

## Funding request form questions

### Contact information

- First name
- Surname
- Position in organisation
- Email address

### Charity information

- Full name of organisation
- Main telephone number of organisation
- Street address
- Town/City
- County
- Postcode
- Organisation's website
- Charity registration number
- Year charity was established
- Brief summary of your organisation – aims, activities, key developments etc. (Max 600 characters, approx. 200 words)
- Year end date of latest available annual accounts:
  - In which, income
  - Expenditure
  - Reserves
- Summary of your charity's current funding sources (Max 600 characters, approx. 200 words)
- Has your organisation previously received funding from any of the Swire charitable trusts? (Swire Charitable Trust, Adrian Swire Charitable Trust, John Swire 1989 Charitable Trust or Swire 2765)

### Funding request

- Title of your funding request (Max 140 characters, approx. 20 words)
- Short summary of your funding request (Max 700 characters, approx. 100 words)
- Please select the programme you would like to apply to (Welfare / Opportunity / Heritage)
- Please select the type of funding sought (Project/Core Funding)

- Please select the most relevant region for your funding request (Various)
- Village/Town/City/Area where the work will take place
- Amount requested
- Total project budget (for project funding requests only)
- Timescale for your requested funding (key dates, duration, etc.)
- Please give an overview of the needs/issues that will be addressed by the work you are seeking funding for (Max 2,100 characters, approx. 300 words)
- Please explain how your charity plans to address these needs/issues (Max 2,100 characters, approx. 300 words)
- If applicable, please detail how many direct beneficiaries will be supported by this grant (Please note, this field must be completed for all applications under the Opportunity category. If not applicable e.g. for some Environment or Heritage applications, please enter 0)
- Please detail how this figure has been calculated (Max 700 characters)
- Please highlight up to 3 key outcomes that you aim to achieve from the work and how you plan to monitor and evaluate these (Max 2,100 characters, 300 words)
- Please explain why your organisation is well placed & qualified to deliver this work? (Max 1,400 characters, approx. 200 words)
- Please give details of your fundraising to date for this work – funding secured and sources, pending applications etc. (Max 1,400 characters, approx. 200 words)
- Is there anything else you would like to share with us at this stage? (Max 3,500 characters, approx. 500 words)

### Attachments

- Latest inspected/audited accounts (If your organisation is too new to have annual accounts please attach a photocopy of a recent bank statement)
- Project budget or organisational budget
- Any other published materials that you think may add weight to your request (e.g. evaluations, impact reports, annual reviews, research etc)

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## Monitoring form questions

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### Interim Monitoring Report

- Please could you update us on the work undertaken and progress made against the outcomes specified in your original application.
- Did this work differ from what you set out to do? If so, in what way?
- Did you have any unexpected successes? If so, what factors do you attribute these to?
- What, if anything, has not gone so well - and what have you learnt from this?
- What evaluation methods are you using to determine the effectiveness of this work?
- What impact is this work having so far and are you likely to change how you deliver it in the coming year?
- Is there anything else you would like to share with us at this stage?

### Final Monitoring Report

- Please update us on the work undertaken and how you have done against the projected outcomes specified in your original application.
- Did this work differ from what you set out to do? If so, in what way?
- Did you have any unexpected successes? If so, what factors do you attribute these to?
- What, if anything, has not gone so well - and what have you learnt from this?
- What evaluation methods have you used to determine the effectiveness of this work?
- What impact is your work having so far and will it continue to be delivered by your charity in the future?
- Is there anything else you would like to share with us at this stage?
- Do you have any comments that you would like to share about our grant application and reporting process, and your dealings with us?