Funding, Applications and Fundraising Policy

1. Funding Applications.

1.1 Preparing Applications

- Good applications need to show enthusiasm and knowledge about the proposed outcomes.
- Applications should be first agreed in principle by the Board before applications are prepared to ensure that multiple applications are not being prepared for a single fund.
- Proposals are best prepared by the person/people involved in identifying the prospect and who will manage the project if funding is secured.
- Draft applications should be subject to a constructive review by at least one other trustee.
- All applications should be reviewed by the Treasurer and agreed by the Board before submission.
- If the application is to fund a new project, a project plan should also be available to the Board.

1.2 Project Execution

Successful applications should be managed by the trustee assigned responsibility for the project by the Board to ensure;

- that the agreed funding outcomes are met
- the money is spent timeously
- report(s) are submitted to the funder as and when required.
- Contact is maintained with the funder during the project as required to report progress and agree any modifications to the outcomes and/or spend limit.
- Funding claim applications are completed and submitted in accordance with the funders requirements and timetable.

All correspondence with the funder such as award offers and reports to the funder should be placed in a dedicated project file on the TreeLink shared drive contained within the Grants & Sponsors folder.

The Treasurer shall maintain all receipts and invoices within the Financial records. Receipts and invoices will be compiled as required to support applications for funding claims..

2. Fund-raising Activities

2.1 Fund Raising Process

- All fund raising proposals shall be authorised by the Board.
- Fund-raising activities may be carried out to generate unrestricted funds to support the Charities core costs or when agreed to fund specific projects.
- Each funding raising activity should be assigned a named trustee for liaison and oversight to ensure that it is legal, ethical and in line with TreeLink values.
- Fundraising activities need not be undertaken by a trustee.
- Working groups may undertake fundraising for specific projects as agreed and authorised by the Board.
- Funds may also be generated by, for example, members/volunteers nominating TreeLink as a beneficiary of workplace fundraising or members/volunteers participating in sponsored events to raise funds for TreeLink.
- The preferred mechanism for collecting funds generated is via CAF Donate, the on-line donation facility. This ensures that the risks associated with cash handling are minimised and that donors have an opportunity to provide additional benefit by claiming gift aid on any donations.
- It is preferred that a CAF portal is established for each campaign. This can be arranged by the responsible trustee.

3. Responsibilities

Overall responsibility for the implementation, monitoring and review of this policy and procedures lies with the Treasurer.

Implementation and adherence to this policy is the responsibility of all trustees, members and other volunteers within the organisation.

Adopted by the board of trustees on 6th January 2025

To be revised by January 2027