

PROJECT APPLICATION & BRIEF



PART A

To be completed by the charity

Please email your completed application to our Project Coordinator at:
vanessa.longman@cranfieldtrust.org

Name of organisation			
Charity number/s			
Address			
Name of individual completing application			
Job Title / Role within Charity			
Contact phone number		Email	
Website address			
Link to latest accounts			
How did you hear of us?			
Date application submitted			

1. Background of Charity

When was the organisation founded? What does it do? Who are your beneficiaries and how many people do you support?

2. Organisational Structure and Roles (Staff / Trustees / Volunteers)

What is your organisational structure and how many staff do you have? (Please attach an organisation structure separately in your email, if you have one.) How many volunteers do you have and what do they do? Please include the names of your trustees and a sentence about their background.

3. Funding

Total annual income	£		
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	None	0 - 3 months	3 - 6 months
Level of free reserves (please tick as appropriate)			

Sources of funding to nearest 10%	Funders Foundations Trusts	Local Authority	Central Government	Earned Income	Public Donations	Philanthropic Donations	Other
% of total Income							

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4. Details of consultancy support required

How would you like support from a Cranfield Trust volunteer consultant? What would you like the project to deliver and how will you determine its success in the short term and long term?

5. Charity's resources & accountability to support the project.

*A consultancy project requires commitment from the organisation. Who will take ownership of the project, and which staff members / trustees will working with the consultant? It is essential that enough people are involved to cover any organisational changes and to **implement** any agreed plans and future activities.*

6. Project timescales

Are there any relevant key dates which should be considered, such as Board meetings or funding application deadlines which we need to work around? (NB It usually takes around one month to match a volunteer with a charity client.)

Thank you and we look forward to working with you.

The next sections are to be completed following the initial discussion with a Cranfield Trust Project Manager and completion of a Journey to Excellence (J2E©) project impact tool. This confirms agreement with the scope, deliverables and conditions of the project.

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PART B

To be completed by the Cranfield Trust Project Manager following the project meeting / discussion

Project Title	Project No.
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7. Agreed scope

Note any additions/reductions to the scope outlined by the client resulting from project meeting/discussion

Expected Deliverables:

Overall Impact:

8. Time commitment for charity and volunteer

Note here any dates or milestones the volunteer needs to be aware to deliver this project - the volunteer will confirm actual number of days needed for the project following the initial meeting with the charity

9. Accountability and involvement

Who is the key contact from the charity and who is the secondary contact (and their contact details). Who else will be involved (other staff, Trustees).

Lead person :	
Secondary person & other staff	

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PART C - AGREEMENT OF CHARITY

To be completed by the charity after a meeting / discussion with the Cranfield Trust Project Manager, confirming agreement with the scope, deliverables and conditions of the project.

Volunteer expenses

Our consultancy service is free to voluntary organisations; all we ask is that you cover our volunteers' expenses, such as travel where appropriate. The nature and level of these expenses and how they should be claimed must be agreed at the start of the project between the charity and the volunteer.

Publicity

Cranfield Trust uses general write-ups of projects carried out by its volunteers for publicity purposes in fundraising and recruiting new volunteers. Detailed descriptions of client charities or the content of the projects are not made public. Please let us know if you would prefer your organisation or project not to be mentioned in our "client list" or in other material (e.g. newsletters).

Ownership of Intellectual Property & Confidentiality

All intellectual property and related material, including any trade secrets, moral rights, goodwill, relevant registrations or applications for registration, and rights in any patent, copyright, trademark, trade dress, industrial design and trade name (the "Intellectual Property") that is developed or produced during this project, will be the sole property of the Organisation. The use of the Intellectual Property by the Organisation will not be restricted in any manner. Once the project has concluded, Cranfield Trust and the Volunteer Consultant will return to the Organisation any documentation, records, or confidential information which is their property which is requested by the Organisation.

Confidential information refers to any data or information relating to the business of the Organisation which would reasonably be considered to be proprietary to the Organisation including, but not limited to, accounting records, business processes, and organisation records and that is not generally known in the industry of the Organisation and where the release of that confidential information could reasonably be expected to cause harm to the Organisation. Cranfield Trust agrees that they will not disclose, divulge, reveal, report or use, for any purpose, any confidential information which Cranfield Trust has obtained from the Organisation or the Volunteer Consultant, except as authorised by the Organisation or as required by law. The obligations of confidentiality will apply during the term of the project and beyond.

Organisation and Volunteer Consultant's Feedback

Cranfield Trust's vision is for all voluntary organisations to have the management expertise they need to help them thrive. As a charity we rely solely on income generated from our fundraising activities, completion of the Journey to Excellence forms and the on-line feedback you provide at the end of your project is vital to our sustainability. Without the J2E and your feedback, we are unable to monitor and evaluate our services for funders, putting our valuable services in jeopardy. Taking time to complete and return your feedback survey means other charities, like yours, will be able to benefit from our free services in the future.

TRUSTEE AND CEO DECLARATION

I can confirm that a trustee and the CEO of the Charity have read the final Project Brief and agree that it is accurate and that the scope of the project, tasks and deliverables are in line with the desired outcomes required by the Charity. We are aware of the time input and commitment required by the charity staff and/or volunteers to achieve a successful outcome from the project and agree that this time should be committed to the project.

Trustee – confirmation of agreement

Signature _____

Print _____ Date _____

Charity CEO/Project Manager – confirmation of agreement

Signature _____

Print _____ Date _____