

# Shears Foundation Scoring spreadsheet 2024/25

Name of charity  
Name of project / work  
Date of scoring  
Year  
Quarter


<b>Final Score</b>	
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## PRE-SCORING

1. Has the applicant had a phone call / video call with us before applying? (Please note, if applicants have not done this, we will not progress the application)	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the Charity Commission / Company Registration number legitimate?	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the organisation governed by at least 3 unconnected trustees / directors? (Please note, we will not normally fund organisations with less than 3 unconnected trustees / directors)	<input type="checkbox"/>	<input type="checkbox"/>
4. Has the applicant applied for less than the MAXIMUM grant amount and more than the MINIMUM?	<input type="checkbox"/>	<input type="checkbox"/>
5. Do payments require two or more signatures / approvals? (normally we require at least two people to authorise payments that an organisation makes)	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the applicant attached a suitable & acceptable Safeguarding Policy that is proportionate to the Safeguarding risk of the organisation?	<input type="checkbox"/>	<input type="checkbox"/>
7. Has the applicant made a suitable & acceptable Environmental Impact Statement?	<input type="checkbox"/>	<input type="checkbox"/>
8. Has the applicant made a suitable EDI Statement?	<input type="checkbox"/>	<input type="checkbox"/>
9. Has the organisation stated that they are NOT being investigated for any reason? (Please note, we will not fund organisations that are under any kind of statutory investigation)	<input type="checkbox"/>	<input type="checkbox"/>
10. Are the objects / aims of the organisation NOT exclusively religious in their nature? (Please note that we will not fund organisations that have exclusively religious purposes)	<input type="checkbox"/>	<input type="checkbox"/>
11. If the organisation is not a charity, is there clear evidence of charitable purpose, including a constitutional ASSET LOCK?	<input type="checkbox"/>	<input type="checkbox"/>
12. Are there any indications from the accounts provided that the organisation is NOT a going concern?	<input type="checkbox"/>	<input type="checkbox"/>

**Any notes on Pre-Scoring that we should convey to trustees if the application goes to them. For example, has the applicant provided evidence of robust financial controls if their account is single signatory? Are there aspects of any policies that cause concern? Are there any other concerns?**

## FREE RESERVES

Expenditure figure from application form	
Free reserves figure from application form	
<b>Number of months free reserves</b>	<b>MONTHS</b>

3-6 months operating costs	5
below 3 months operating costs	4
6-12 months operating costs	3
Below 1 months operating costs	2
above 12 months operating costs	1
Above 18 months operating costs	0

<b>SCORE FOR RESERVES</b>	
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**Has the applicant stated anything in the application that might impact positively or negatively on this score? Have they explained why they might have high reserves? There is a separate question for them to provide additional financial information.**

	YES	NO
Do the free reserves stated in the application match the most recent accounts?	<input type="checkbox"/>	<input type="checkbox"/>
Is the explanation of the free reserves in the accounts acceptable / relevant?	<input type="checkbox"/>	<input type="checkbox"/>
Do the free reserves match the trustees' Reserves Policy as stated in the annual accounts?	<input type="checkbox"/>	<input type="checkbox"/>

**Any notes on the reserves / policy etc. that leads to an adjustment to the initial score? For example, if reserves do not match the policy of the trustees, is the reason for this explained?**

<b>ADJUSTMENT (POSITIVE OR NEGATIVE) THAT ADJUSTS THE INITIAL SCORE</b>	
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## PREVIOUS RECIPIENT

More than three previous successful grants, with good feedback and monitoring	5
Three previous successful grants, with good feedback and monitoring	4
Two Previous successful grants, with good feedback and monitoring	3
One Previous successful grant, with good feedback and monitoring	2
Not a previous recipient, with good feedback and monitoring	1

<b>SCORE FOR BEING A PREVIOUS RECIPIENT</b>	
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## OUR CATEGORIES

Application fits into three or more of our categories	3
Application fits into two of our categories	2
Application fits into one of our categories BUT is HEALTH AND MEDICINE	2
Application fits into one of our categories	1

<b>SCORE FOR HOW MANY OF OUR CATEGORIES THE APPLICATION FITS INTO</b>	
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## COST OF LIVING

The application directly addresses the cost of living crisis	4
The application indirectly addresses the CoLC or has elements that address affordability etc.	3
The application does not address the CoLC but is HEALTH AND MEDICINE	3
The application DOES NOT address the cost of living crisis	1

<b>SCORE FOR HOW THE APPLICATION ADDRESSES THE COST OF LIVING CRISIS</b>	
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## QUALITY OF COMMUNICATION

Great, frequent, multiple communication with purpose	4
At least one piece of ad-hoc communication on top of Monitoring and Learning	3
Not a previous applicant	3
Monitoring & Learning Form only	1

**SCORE FOR THE QUALITY OF THE APPLICANTS COMMUNICATION WITH US**

**CHARITY COMMISSION / COMPANIES HOUSE FILING (LAST THREE YEARS)**

No late filing	4
One late filing	3
More than one late filing but most recent accounts are not overdue	1
More than one late filing but most recent accounts are overdue	0

**SCORE FOR REGULATORY COMPLIANCE**

**SIZE (INCOME) OF THE ORGANISATION**

Income of £0 to £50,000	6
Income of £50,001 to £100,000	5
Income of £100,001 to £250,000	4
Income of 250,000 to £500,000	3
Income of £500,000 to £1,500,000	2

**SCORE FOR THE SIZE OF THE ORGANISATION**

**GEOGRAPHICAL LOCATION OF THE WORK THAT WE ARE BEING ASKED TO FUND**

The applicant is based in, and working in Tyne, Wear & Northumberland	4
The applicant is based in, and working in, one of our other specified Shears Foundation core geographic areas	3
The applicant is not based in one of our core areas but is working in Tyne, Wear and Northumberland	3
The applicant is not based in one of our core areas but is working in our other specified Shears Foundation core geographic areas	2
The applicant is working outside of our UK core geographical areas or internationally	1

**SCORE FOR GEOGRAPHY**

**VIABILITY OF THE WORK WE ARE BEING ASKED TO FUND**

The total cost of the work we are being asked to fund	
Funding that the applicant has already secured	
<b>Funding not yet secured</b>	
<b>% of funds left to raise</b>	
Less than 25% of funds to secure, or SF grant is sole funder, or SF Funding completes budget	5
Between 25% and 50% of funds left to secure	4
Between 51% and 75% of funds left to secure	3
More than 75% of funds still to raise	2

**SCORE FOR THE VIABILITY OF THE WORK**

**ERRORS IN THE APPLICATION**

Please only include errors that have an impact on the accuracy of information provided. Spelling and grammar errors should be ignored.

None identified	4
Minor error	3
Multiple or Major Errors	2

**SCORE FOR ERRORS**

**ORGANISATIONAL VALUE FOR MONEY**

The income of the organisation	
The expenditure of the organisation	
The figure in the accounts for COST OF FUNDRAISING	
<b>For Every pound spent on the cost of fundraising, how much income does the organisation raise?</b>	
<b>What percentage of their expenditure does the organisation spend on the cost of fundraising?</b>	
The number of people who will benefit from the work	

Any other additional VFM comments

High Value	4
Medium Value	2
Low Value	1
Unable to ascertain full value from information provided	1

**SCORE FOR VALUE**

**GRANTS ADMINISTRATOR ASSESSMENT**

The assessment from the Grants Administrator includes analysis of the application's fit with current priorities, the quality of the pre-application phone call and pre-application research that we have carried out.

Very high	6
High	4
Medium	2
Low	0

**SCORE FOR GRANT ADMINISTRATOR ASSESSMENT**

**DESKTOP DUE DILIGENCE**

No, there are no issues (Regulatory, Compliance, Safeguarding, Complaints, Negative Publicity) in the last 3 years.	4
Minor issues (Regulatory, Compliance, Safeguarding, Complaints, Negative Publicity) in the last 3 years.	2
Major issues (Regulatory, Compliance, Safeguarding, Complaints, Negative Publicity) in the last 3 years.	0

**SCORE FOR DUE DILIGENCE**

Additional Comments