

Overview

This standard is about determining sources of funding and other resources and establishing good working relationships with actual and potential fund holders. It includes developing and submitting proposals for funding, or other forms of support, and negotiating the terms of proposals to a successful conclusion. You will also establish contingency plans so that you are able to mitigate against any shortfall in funding.

This standard is suitable for practitioners and managers who have responsibility for securing finance to develop provision.

Performance criteria

You must be able to:

1. establish an up to date list of organisations that provide resources currently, and which might provide resources for future activities
2. develop fully costed proposals and recommendations for obtaining the finances and other resources required to deliver proposed activities
3. agree proposals and recommendations with relevant stakeholders
4. make bid proposal submissions to potential funders
5. address any requests for further information and clarification
6. agree contractual arrangements with funders which set out the terms of the resource provisions
7. update all relevant parties regarding the outcome of the proposal
8. provide those who will make use of the resources with information about any conditions attached to the funding
9. develop contingency plans to address any problems regarding the spend requirements
10. implement a system for effective funding source monitoring
11. meet the values and principles in relation to the requirements of this standard

Knowledge and understanding

You need to know and understand:

1. guidelines and codes of practice and any legislative, regulatory and ethical requirements in relation to types and providers of funding
2. the objectives, plans and resources of your own organisation
3. the proposed activities of your organisation, including those which require finance and resources
4. the organisation's stakeholders and their views in relation to the financing of the organisation's activities
5. the current types and providers of finance and other resources used by own organisation, and other potential types and providers of finance and their associated benefits and risks
6. sources of information on resourcing opportunities, including those within the statutory, private, voluntary and charitable sectors
7.
how and when to maximise opportunities and reduce duplication by working in partnership with other stakeholders
8.
how to make a business case and promote the benefits of the proposed projects
9. the scope, available resources and purpose of the funding body being approached, and any constraints under which they operate
10. what information is required by the funding body and the correct format for the presentation of the proposal
11. relevant people in your organisation and any key stakeholders who should be consulted on proposals and recommendations for obtaining finance and resources
12. the importance of submitting clear proposals of bids or applications to providers of finance and other resources, and of allowing sufficient time for consideration
13. the type of agreements that should be put in place with providers of finance and what they should cover
14. the type of actions that might need to be taken in the event of a shortfall in funding
15. why it is necessary to put contingency plans in place in relation to obtaining finance and the type of contingencies that might occur
16. the values and principles in relation to the requirements of this standard

Glossary

Resources

This covers any physical or human resource that supports the adult learning process and could include technical equipment, IT-based resources, buildings, sources of specialist knowledge, local assets.

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| Developed by | CLD Standards Council Scotland |
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| Relevant Occupations | Adult Learning Worker |
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| Suite | Adult Learning |
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