THE OCTOBER CLUB

Charity Application Form Guidance

Funding Criteria - **Our ethos is clear and we follow three simple rules...**

The three rules...

1. We fund small and growing charities with income from donations and legacies, and income arising from charitable activities, which combined amount to £0.75–2.5m per annum
2. The funding is for a TRANSFORMATIONAL project based in the UK
3. The funds must be used within 3 years

Please note:

We will consider income that comes from donations and legacies, and income that arise from charitable activities**.** *Note: we do not include income that arises from other trading and/or fundraising events.* We tend to work with smaller charities so if, for example, your income meets the criteria, but you have £5m of local authority income and the costs and infrastructure scaled to match, you are unlikely to be right for us.

By transformational we mean something beyond business-as-usual growth or linear expansion of what you currently do. The charities that we support are UK based, doing remarkable work and with the ambition to extend this.

All are welcome to apply as long as you meet the criteria stated. There are no particular causes we avoid, although we tend not to fund binary-outcome medical research. Also, we tend not to fund charities that are in the same field as our beneficiaries of the previous two years.

We support one charity per year. While we cannot guarantee the amount we will raise in any given year, the average of recent years is around £650k.

Due to the high volume of submissions, we are unable to provide individual feedback on applications that fail to meet the criteria. On request, we may be able to provide feedback on those that do meet the criteria but are nevertheless unsuccessful.

If you have any questions or concerns about the criteria, please email enquiries@theoctoberclub.co.uk or contact a committee member via LinkedIn.

Application Guidance

Section 1 - Charity Details

• Please state your charity name, charity registration number, website, address and a contact telephone number.

Section 2 - Applicant Details

• Please detail your name, job title and email address.

• Please sign and date in the appropriate boxes.

Section 3 - Charity Background

• Please provide a brief summary (150 words max) of the charity's background including when the charity was founded, your primary services, service users and beneficiary statistics and the geographical areas your charity operates in.

Section 4 - Financial Profile

• Please submit a copy of your two most recent signed audited accounts. Ensure that the audited accounts are signed by an auditor or an independent examiner.

- Send the files as **PDFs** and name them clearly in the following manner: "Charity name", "Year" Year End Accounts e.g. <Charityname > 2026 Year End Accounts.pdf

• Additionally, please submit your most recent management accounts as well as a summary of your original budget for the year.

- Send these files also as **PDFs** with the charity name and type of file clearly in the title.

• Please complete the table found in the financials section of the application form using SORP (http://www.charitysorp.org) as a guideline.

- Note: the cost of the executive/leadership team should include all salaries, emoluments, bonuses, employer's national insurance and employer's pension contributions.

Section 5 - Transformational Project

• Please tell us what your transformational project is in a sentence of 15 words maximum.

• Please outline how The October Club investment will transform your organisation (maximum 500 words). This should cover how the project is transformational (for the

charity or beneficiaries), what was learnt during the project's pilot phase, what the intended outcomes are, what success looks like, how the project is to be sustained beyond The October Club funding, and how the project will be measured and evaluated.

• Please provide a budget breakdown of how The October Club investment will be used. Again, please submit this as a printable **PDF** (of an excel sheet, if applicable).

Section 6 - Governance

• Please provide brief biographies of your Chair, including length in post, and the names of all your trustees.

• Please provide a brief biography of your Chief Executive Officer including name, length in post and salary.

• Please state the number of staff, full time and part time, and the number of volunteers.

Section 7- Other Information

• Please provide details if you have been encouraged to apply to The October Club by a committee member or friend of The October Club, or if you have any connection to a committee member.

• Please provide details if you have previously applied to The October Club.

• Please specify any other potential large-scale investments (receipts over £200k) in this project or your organisation. The October Club investment is designed to make possible a transformational change that wouldn't otherwise happen. Therefore, we want to understand any potential large-scale funding opportunities you have in the pipeline. We are not wishing in any way to undermine your pipeline and welcome additional investment, but we do need to understand the hierarchy of your investments.

• Please provide a statement regarding any financial or reputational risks that are currently being considered by your Board of Trustees or have been considered in the past 12 months.

Application Submission

• Please email your application as a **Word document ONLY**, saved as the name of your charity [for example <Charityname>2027 Application.doc]

• Applications must be submitted by close of business on **5th February 2027** to:

Taina Slendebroek
enquiries@theoctoberclub.co.uk

- We will let you know by end April if you have been selected to present to the committee.

We look forward to receiving the completed application. Please also refer to the FAQs on our website for more information about what makes a good application, the selection process and our expectations should you be chosen to be our partner charity for 2027.