

Standardised scoring for assessing applications June 2023 Version

The scoring system here is for guidance only. We're sharing it so that you can make an assessment of whether you think your application will get a high enough score to progress to our second stage, where our trustees vote on the applications. Typically around 40% of the applications we receive each quarter progress to our trustee stage. Applications with a score of over 39 have a reasonable chance of progressing. Remember that this is just a tool to help you. Whilst many of the scores are largely objective, some are more subjective - so our score might not be the same as yours. We won't enter into discussions with potential applicants / applicants about the scoring system or the score they receive as part of this process.

Description of Scoring Criteria		3-6 months operating costs	below 3 months operating costs	6 months to one year operating costs	Below 1 months operating costs	above 12 months operating costs	Above 18 months operating costs
1	What free reserves does the applicant have ? We will be flexible on this where an applicant has provided further information on the level of reserves.	5	4	3	2	1	0

Description of Scoring Criteria		More than three previous, successful, grants	three previous, successful, grants	two previous, successful, grants	One Previous Grant	Not a previous recipient
2	Is the application from a previous Shears Foundation grant recipient ?	4	3	2	1	0

Description of Scoring Criteria		three or more	two	One, where the application is in the Health and Medicine Category	One, all other categories
3	How many of our priority areas does the application meet ?	3	2	2	1

Description of Scoring Criteria		Yes, directly	Yes, secondary	No, where the application is in the Health and Medicine Category	No
4	Does the application help address the cost of living crisis ?	4	3	3	1

Description of Scoring Criteria		Great communication	At least one ad-hoc update / communication	Not a previous applicant	Monitoring form only
5	What is the quality of communication from the charity ? Trustees really appreciate a level of communication with a grant recipient that helps us know how things are going, but doesn't put an undue burden on them to report to us. However the scoring system is designed to not unduly penalise a new applicant/	4	3	3	1

Description of Scoring Criteria		No record of late filing	one late filing	more than one late filing, but most recent filing is on time.	The organisation's most recent filing is late
6	What is the applicants filing history in the last three years ?	4	3	1	0

Description of Scoring Criteria		Income of £0 to £10,000	Income of £10,001 to £100,000	Income of £100,001 to £250,000	Income of 250,000 to £500,000	Income of £500,001 to £1,000,000	Income of £1,000,001 to £10,000,000	Income of over £10,000,001
7	What was the applicant's income in their most recently filed accounts ?	6	5	4	4	3	2	1

Description of Scoring Criteria		The applicant is based in, and working in, Tyne, Wear & Northumberland	The applicant is based in, and working in, one of our other specified Shears Foundation core geographic areas	The applicant is not based in one of our core areas but is working in Tyne, Wear and Northumberland	The applicant is not based in one of our core areas but is working in our other specified Shears Foundation core geographic areas	The applicant is working outside of our UK core geographical areas or internationally
8	How does the application fit with our geographic priority areas ?	4	3	3	2	1

Description of Scoring Criteria		Less than 25% of funds to secure, or SF grant is sole funder	Between 25% and 50% of funds left to secure	Between 51% and 75% of funds left to secure	More than 75% of funds still to raise
9	How financially viable is the work we are being asked to fund ?	5	4	3	2

Description of Scoring Criteria		None identified	Minor error	Multiple errors or Major errors
10	Are there any errors in the application ? For example, does the financial information on the application match the annual accounts submitted ? Is the amount applied for the same as our fixed grant amount ?	4	2	1

Description of Scoring Criteria		High value for money	Medium Value for money	Low value for money
11	Does the organisation, and the work they are doing represent value for money ? Is the spending on raising funds proportionate to the funds they raise ? How many people will benefit from the grant ?	4	2	1

Description of Scoring Criteria		Yes	No
12	Are the objects of the organisation consistent with the work that we are being asked to fund. For example, with applications from religious groups, do their objects clearly state a broader purpose other than promoting a specific religious cause ?	4	1

Description of Scoring Criteria		No	Yes
13	Does our desk based due diligence indicate their have been any governance, legal, compliance, safeguarding etc. issues with the organisation in the last three years ?	3	0

MAXIMUM POSSIBLE SCORE FOR AN APPLICATION	54
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