Collecting, creating, storing, and using key business and project information

Using these templates, you can quickly and easily collect, create, and store the information required to submit a great grant application or tender response. By copying and pasting from here, you can save time and, once you feel confident, even delegate parts of the application process to others, allowing you to focus on the more important aspects of the application.

Tips to ensure this template works well for you:

- Ensure the information is accurate, current and relevant to the specific opportunity.

- Consider using graphics or infographics to explain concepts in pictures instead of primarily using words.

- After gathering your information and writing your paragraphs or bulleted lists, try copying and pasting text into ChatGPT with an accompanying question asking the AI to refine the words for you. You may be pleasantly surprised with the result!

Key business information

	Information which may be required	Populate the rows below, then you can cut & paste information into your application. Ensure your spelling and formatting are consistent and the information is current.
1.	**ABN / ACN**	
2.	**Registered business name**	
3.	**Business physical address**	
4.	**Business postal address**	
5.	**Business contact details**	
6.	**Website**	
7.	**Social media urls / links**	Ensure your social media presence accurately portrays your practice's values and demonstrates your commitment to the issues in the application. If necessary, build your social media to better showcase your awareness of and involvement in these issues to reinforce your position and create a lasting impression.
8.	**Contact person full name**	
9.	**Contact person designation**	
10.	**Contact person email / phone number**	

ISO 9001 QUALITY

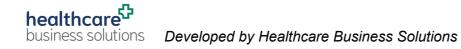| 11.	**Practice principal / director / CEO full name**	
12.	**Practice principal / director / CEO contact details**	
13.	**CVs of key people**	This is generally a requirement for tender applications, but not routinely required for grants. Keep CVs brief. Tips: Ensure CVs are up to date; proofread for correct spelling and grammar; ensure they are revised in line with specific reference to your response or application, specifically around terminology; and always use the same template / colour palette / font for all CVs.
14.	**Capability statement / business overview***	You may need to tweak the details of your capability statement / overview depending on the focus of the application. For example, if you're applying for funding for enhancing your business' ability to provide telehealth, mention the distances involved in your patients accessing timely care, or include statistics on the numbers of patients on your database residing in particular post codes to demonstrate why access to telehealth services will have a positive impact.
15.	**Bank account details**	
16.	**Business / project plan**	If you don't have a business plan, prepare a straightforward, concise and general document which can be easily adjusted to match a particular application. There are free online resources available to do this including: https://www.business.qld.gov.au/running-business/planning/writing-plan Keep a copy here and adjust or alter according to the needs of the application.
17.	**Organisational chart**	Keep a copy on one of the following page to easily cut and paste or save as a new document.
18.	**Annual report**	Usually only required for not-for-profit grant applications.
19.	**Financial statements (3 years)**	Keep a copy of these on one of the following pages, to easily cut and paste or save as a new document. Some applications call for signed, audited financial statements. Make sure you're clear on what is required.
20.	**Insurances**	Keep a copy of current certificates of currency on one of the following pages, to easily cut and paste or save as a new document. Insurances commonly requested include public liability and worker's compensation.
21.	**Accreditation certificate(s)**	Save copies to one of the following pages, to easily cut and paste or save as a new document.

Information specific to a particular project, initiative or set of services

1.	**Project / initiative name**	
2.	**Start date**	Ensure this date aligns with the timeline in the application documentation
3.	**End date**	Ensure this date aligns with the timeline in the application documentation
4.	**Description of project or initiative:** • What is the problem or need? • What is your target group / demographic? • What is the solution you propose to address the problem or need? • What is the plan to get there? • What resources / inputs do you need to achieve success? • What specific outcomes do you want to achieve? • What are some of the risks which may impact your success? How will you address these? • How will you measure success?	Don't forget to include: • Timeline / project milestones. Consider an infographic • How the project aligns with govt / grant maker / owner's priorities? • Who are the partners / stakeholders and / or who have you consulted with? • What will the benefits or return on investment be for the grant-maker / owner? • What will the long-term outcomes be? • How will the success of the initiative, including expected outcomes be measured. What evaluation methods will you use? Never assume your reader understands your business / your region / your issues: • Keep it simple. • Use plain language. • Avoid jargon or industry acronyms. • Your story will be clearer if you: • Use concrete facts and figures like numbers, dates, percentages and actual units of time. • Always have your documents proofread by someone unrelated to your business to ensure a lay person can understand your proposal. Word counts are important!
5.	**Supporting material to:** • Highlight the problem or need • Illustrate your track record • Emphasise your previous experience; or • Sell your ability to deliver the desired results	Plan for and collect evidence of your success stories including: • Social media or other publicity mentioning previous activities, events or involvement in community initiatives relating to your proposal. • Case study examples showing your track record or commitment to a particular cause or issue.

		• Recommendations or letters of support from organisations or people who have worked with you or have knowledge of your reputation. Approach reputable people and organisations e.g., local councillors, your MP, Queensland Health etc. • Statements from respected sources emphasising the need for a solution you are proposing. • Evidence in the public domain (news articles or social media posts) showing the scope of the issue or the impact of the unmet need. • Photos and links to video of previous projects / initiatives you've participated in or spearheaded.
6.	**Partners / stakeholders**	