CREATING A TABLE OF INFORMATION ABOUT GRANT MAKING TRUSTS

IMPACT IN ACTION

LARGER ORGANISATIONS MAY HAVE A DATABASE WHERE THEY RECORD INFORMATION ON GRANT MAKING TRUSTS, BUT FOR MOST OF US AN EXCEL SPREADSHEET WILL SUFFICE. THIS ONE PAGE WONDER COMPLIMENTS THE 1-2-1S EXCEL SESSIONS KAREN OFFERS.

Enter some information on your trusts. The exact headings below will depend on what you want to record. Here are some suggestions.

Don't forget

If you are collecting personal information such as an individual's named email address then your Data Protection policy should reflect this.

1) ADD SOME INFORMATION TO AN EXCEL SHEET

AutoSave Off — Sample Trust List — Search (Alt+Q)

File Home Insert Page Layout Formulas Data Review View Help

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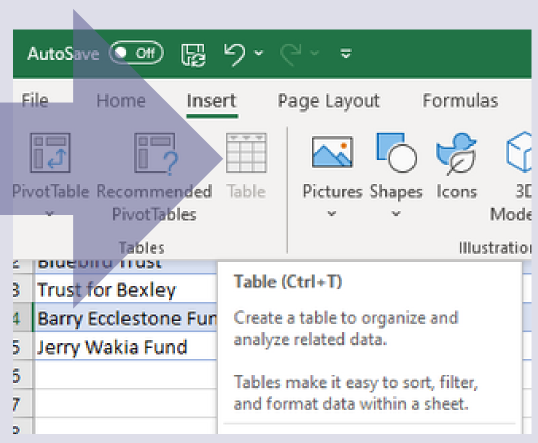
	A	B	C	D	E	F	G	H	I
1	Name of the Trust	Website	Action month	Action to take	Application made financial year 2020-21	Application da	Application successful?	Amount applied 2020-21	Amount Successful
2	Bluebird Trust	www.bluebird.org	Jan	Report	1	12/05/2021	1	10000	9000
3	Trust for Bexley	www.thrust4bexle	Feb	Apply for proje	0		0	0	0
4	Barry Ecclestone Fu	www.befflestone.c	Jan	Report	1	12/10/2021	1	500	500
5	Jerry Wakia Fund	www.jwf.org	Sept	Research to se	0		0	0	0

Action month: when you need to do something with the trust. By having this you can sort the information so you can see what to do in January, February etc. Never miss a deadline! **Action to take:** what do you need to do with the trust? For instance research more or apply.

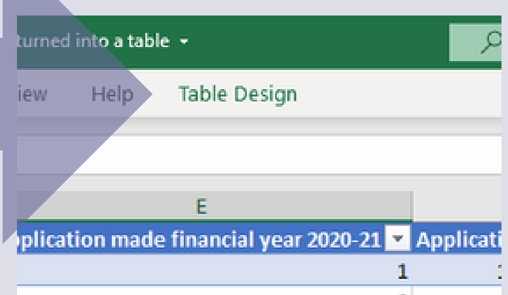
There are various ways to do your Excel spreadsheet, but an easy way to start is to add to the list where an application was successful. If yes the add a 1, you can then add up the numbers in this column so you can see how many applications you made this financial year.

2) TURN IT INTO A TABLE

Click into a cell with data in. Insert (on the ribbon), *Table* and select the data that you want to be in the table. It is likely that Excel will automatically select all of your information.

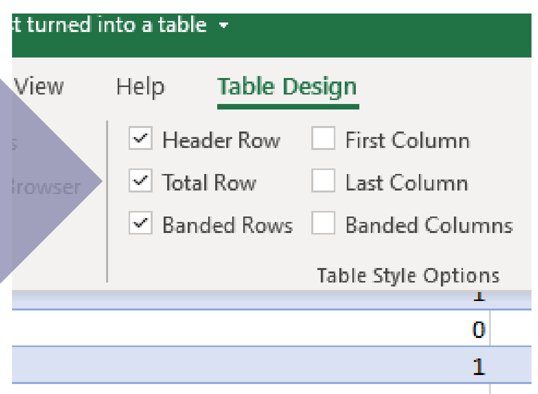


You'll see the page go stripy and there will be a new option at the top called *Table Design.*

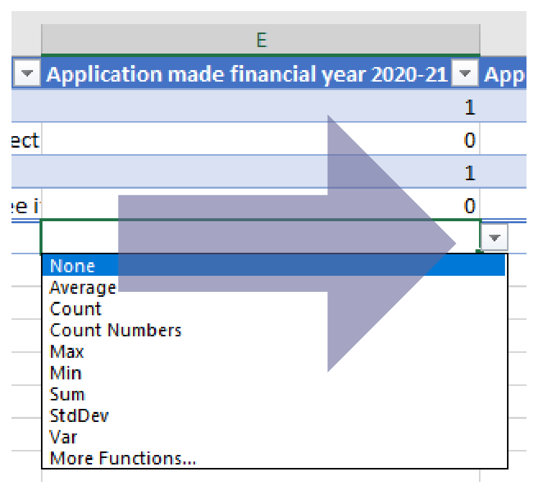


3) WORK OUT HOW MANY APPLICATIONS YOU MADE: COUNTING

Click Table Design and tick the *Total Row* box. A new row will appear.

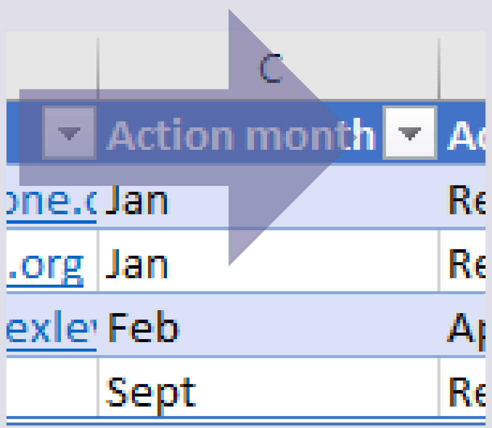


Go to the row you've just created and the column you want to count and click on the *down arrow.* Choose Count. Use a smilar method to work out the average size of grants you have applied for.

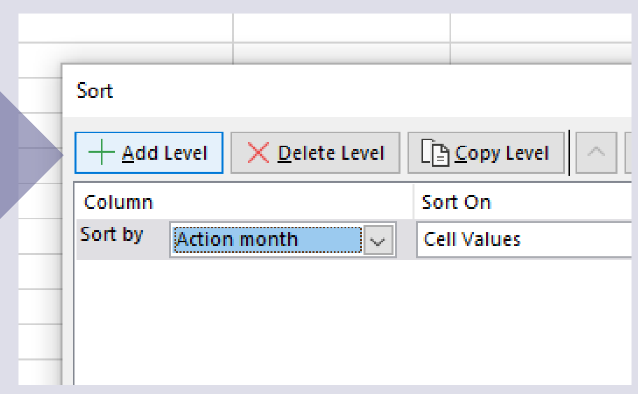


4) SEE ACTIONS TO TAKE IN A MONTH: SORTING

A quick way is to click on the arrows at the top of each column.



If you wanted to sort on two things, firstly the Action month and then Trust Name in alphabetical order, click into the data, click Data, Sort and then *Add a Level.*



Impact in Action is a project under BVSC, funded by City Bridge Trust. Contact Impact Officer, Karen Jefferys, karen@bvsc.co.uk 01322 315391