

## Grant application help notes

These notes are to help you complete our application form. If there is anything you do not understand, please contact us or ask your local council for voluntary service.

### Q1. Contact Details

This should be the name and address of the organisation that is applying for the grant and will be responsible for how it is used, if successful.

If you have paid employees, the **highest ranking person** in your organisation will be called the chief executive, chief officer, manager, co-ordinator or something similar. If you are entirely volunteer-run, the highest ranking person will be the chair of your trustees, board or management committee. The **first contact person** should be someone who can discuss the application. If possible please give a **second contact person** in case the first is not available. The second person needs to know enough about the project or activity so that they can answer questions.

### Q2. What type of organisation are you?

Please tell us about the **legal status** of your organisation. This is a different to whether you are a charity (see below) as charities may be incorporated or unincorporated. If you are incorporated or established by some statutory instrument, your organisation will have its own legal identity separate to the people who run it.

If you are **charity** you will normally be registered with the Charity Commission and have a charity number. Certain charities are *exempt* from registration, normally because they are supervised by another body; examples include universities and housing associations. Other charities, including some churches, scout and guide groups, and armed service funds, are regulated by the Commission but are *excepted* from registration

**You do not have to be a registered charity to get a grant, but we can only give grants for activities or projects that are charitable in law.** If you are not a charity, we may need more information to ensure any grant we make is used for exclusively charitable purposes.

### Q3. When did your organisation start?

Enter the year in which your organisation was set up (or the exact date if known).



#### **Q4. What does your organisation do?**

This should be a brief summary of the work of your whole organisation rather than the project or activity for which you want a grant. Please try to avoid jargon or abbreviations.

*For example a youth club might say: We are a club working with children and young people 13-19 years old. We open four nights a week. We provide sport, leisure and arts activities.*

#### **Q5. Where does your organisation do most of its work?**

State your town/city/village and Local Authority area

#### **Q6. How many people benefit from or take part in your organisation's activities each year?**

This question refers to the number of people who benefit not counting volunteers or workers. You might call these people your service users, beneficiaries or clients.

#### **Q7. How many people are involved in running your organisation?**

By trustees, board or management committee members, we mean the people responsible for governing your organisation. By staff we mean people who are paid employees of your organisation. Full time means 35 hours or more a week; if they are paid for fewer hours than this, count them as part time. By volunteers we mean people, other than the trustees/directors or management committee members, who help run your organisation's activities on an entirely voluntary basis. If any questions don't apply put a 0 in the box.

#### **Q8. What is your organisation's income?**

The figures should be taken from your most recent annual financial statements. The unrestricted reserves figure should **not** include any money you have been given for a specific purpose (restricted funds), for example other grants. If you are not sure about your reserves figure, please ask your treasurer, bookkeeper or accountant.

You must send your latest annual financial statements with the application. These should not be more than 18 months old. If you are a completely new organisation, you can send a copy of your most recent bank statement.

#### **Q9. Describe the project or activity you want the grant for**

In the first box, give your project or activity a short name or title of no more than 10 words. If you are seeking a contribution to general activities or 'core' costs, please say so.

In the second box, tell us about your plans and how you will spend our grant. Describe what you will do, when, where and what resources you will use to make it happen, like equipment, staff, volunteers etc.



### **Q10. Why is the project or activity needed and how do you know it will work?**

Tell us how you know the project or activity is needed or wanted by the people who will mainly benefit, and how you know the approach you plan to take is the right one. We are keen to see that your target community has been engaged in the decision to run the project. We also want to understand the evidence from your own work, or from the wider field, that you are using to help you design your project or activity. If you are trying out something new for your organisation, or for your field, please say so here and describe an appropriate grant objective in Q12. In Q13 you will need to say what tools you will use to understand whether your new approach has worked.

### **Q11. Which of the following statements best describes the aim of your project?**

Through our funding as a whole, we are looking to make grants across three broad themes. Please select the one you think most closely fits the project or activity which you want us to fund with this grant.

- *Supporting people to overcome disadvantage* – e.g. meeting individuals' needs through services, empowering them through advice and support, or giving them a voice through confidence-building and advocacy
- *Creating stronger communities* – e.g. supporting people who share a place, interest or identity by providing facilities, opportunities to work together and a common voice on relevant issues.
- *Making the area a good place to live* – e.g. through providing good quality housing, sustainable local environments, vibrant cultural venues and excellent sports facilities.

### **Q12. Which of the following best describes what you hope your project will achieve?**

Through our funding as a whole, we are looking to make grants that contribute to three main outcomes. Please select the one you think most closely fits the project or activity which you want us to fund with this grant.

- *Provide services and activities that work* – the grant will mainly help your organisation maintain, expand or provide new services.
- *Create stronger organisations* – the grant will mainly help with your organisation's development rather than the costs of your services; or it will help to strengthen civil society more widely through helping organisations other than your own.
- *Support a change in policy and practice* – rather than services, the grant will focus on helping your organisation to influence improvements in relevant policy and practice.



### Q13. Identify a maximum of 3 objectives that will be met as a result of the grant:

Use this section to state simply and clearly what you are going to do with your grant. Try to ensure that your grant objectives are “SMART”:

<b>Specific</b>	You should state exactly what you intend to do with the grant.
<b>Measurable</b>	Make sure it is possible to collect evidence of what is achieved with the grant.
<b>Achievable</b>	Be realistic, and only set grant objectives that you are able to deliver.
<b>Relevant</b>	Remember we are interested primarily in what difference our grant will make.
<b>Timescaled</b>	For each grant objective tell us exactly when you hope to have achieved it.

Examples might include:

- *For a simple grant to purchase a mower for a cricket club:*
  1. *A mower will be bought and used on the club’s pitch by June 2015.*
- *For a more complex grant to run youth sessions focused on promoting healthy living:*
  1. *40 young people will take part between June and August 2015.*
  2. *12 sessions will be held of 2 hours duration in Summer 2015 covering exercise, healthy eating, smoking, sexual health and drugs and alcohol.*
  3. *We will collect “before and after” evidence to see if participants’ attitudes to healthy living change and report our findings in September 2015.*

Our advisors will review your grant objectives when we consider your application, and may suggest changes to them if necessary.

### Q14. How will you track progress and show whether you have succeeded in achieving your objectives?

At the end of the grant period, we will ask you to provide evidence that these grant objectives have been achieved. For this reason it is important to ensure from the start that you collect the information you will need to meet this requirement. Please briefly explain here how you will go about gathering and using the information you will need. Describe the records you will keep, data you will use and any tools you will apply for evaluation.

### Q15. How many people will benefit from your project?

We know you will not always be sure exactly how many people will benefit; if that is the case, please give an estimate based on your previous work or similar schemes elsewhere.

### Q16-20. Beneficiary information

For Q16, please tick one box which most closely describes the main beneficiaries of your project or activity. If the work you are asking us to fund will be open to anyone, please select ‘the general public’. For Q17 tell us the main area of benefit of the work. If you have said in Q16 that your work will mainly benefit people of a ethnic origin age group, gender or disability/condition, please give details by selecting options in Qs 17-21.



## **Q22-24. Money**

State the total cost of the project and itemise where the funding will come from to pay for it. Make sure you indicate whether funding has been secured or not. You should list each item you are asking for separately with the total cost and in the amount requested from the Community Foundation. You should then put the grand total at the bottom of the table.

## **Q25. Independent Referee**

This should be someone who knows your organisation and its work but is independent of it. That means they should not be a trustee/director, employee, volunteer or beneficiary. A suitable referee might be another funder, a local councillor or a membership body.

## **Q26. Your bank account**

Any grant will be paid by electronic transfer (BACS). We will only make payments into the accounts of organisations, not personal accounts. The name of the account should be that of your organisation. Please provide the address of your bank and your sort code (6 numbers) and account number (8 numbers).

## **Q27-28. How many signatures do your cheques require and how many people are allowed to sign them?**

We expect that cheques should require a minimum of two signatories who are not related to each other, and that at least two people in your organisation are able to sign them.

## **Q29. May we give your organisation's contact details to the press, TV and radio?**

We will only do this if you get a grant and we will contact you in advance before we do.

