



Colin Batts Family Trust Fund Guidance Notes

Completing the application form

What to do before you start

Before completing your application form, please read these guidance notes. If you are hand writing the form, it is also a good idea to write your answers on a separate sheet of paper before writing them on the form. Please make sure your writing is legible. Application forms will be judged on whether your application meets the fund requirements; therefore make sure that you focus on the content of what you write not on how much you write.

If you have the application form electronically, you can type in your answers, but if you amend any of the questions on the form it will invalidate your application. Please use a minimum of size 12 font.

The application form is divided into numbered sections. For each question on the form there is help in answering the question on subsequent pages of this guidance. If you provide further information on additional pages, you should let us know on the application form where you have added extra pages and which sections they relate to. We will only consider the information we ask you for. Please do not send us any additional material, as we will not consider it or return it to you.

Section 1 - About your organisation

1.1-1.2 Name and address of organisation

Tell us the name of the organisation that is applying for the funding and a contact address for the organisation, including the full postal address where the organisation's post normally goes. Note: we cannot fund individuals, we can only fund organisations.

Name of Main Contact Person

Tell us the name and contact details for the person who will act as the spokesperson for your organisation in explaining what you plan to spend the funds on and their position within the group. They should be a representative of the main management committee (Chair, Treasurer or Secretary).

1.3 When did your group start?

Please provide details

1.4 What type of organisation are you? Does your organisation have a set of rules/terms of reference or constitution?

Please note that your answer will not disadvantage you during the application process. You will need to send us the set of rules/terms of reference or constitution by which your organisation is managed. If you don't have any we will expect you to develop some, with our help, prior to applying for funding. If you do have them, you must send them to us with your completed application form (your application might be invalid if you don't send us a copy). It is good practice for the constitution to be signed by the Chair or another officer of your organisation.

1.5 Is your organisation locally managed?

We want to fund locally run and managed voluntary and community organisations, run by and for local people or community members, so we are asking you to tell us how your organisation is managed. We also ask that you provide details of any larger regional or national organisation of which you are a member.

1.6 How many people are involved with your organisation?

Again, because this fund is prioritised towards organisations run by volunteers or with one or fewer full-time staff or workers, we need you to tell us how many paid workers you have in your organisation, including all staff and sessional workers. Full time is defined as 37.5 hours a week. We'd also like to know how many volunteers work for your organisation and how many hours they work. Please provide details about your Management Committee including names, addresses and roles.

1.7 Please explain the aims of your organisation

Tell us the aims and regular activities of your organisation. Tell us what type of organisation you are or describe yourself as: e.g. community organisation, charity, voluntary organisation, BME organisation, faith organisation, company limited by guarantee.

1.8 Policies and Procedures

Your answer will not disadvantage you during the application process.

We may expect you to work towards having relevant policies and procedures in place if you gain funding. We will help you create them if you don't already have them in place. You will only need the policies that are relevant to your organisation and your work. Are your policies in line with any bodies to which you are affiliated?

These policies and procedures could include:

- Equal opportunities
- Health and safety
- Recruitment and selection
- Complaints
- Volunteering
- Public and employers liability insurance
- Criminal Records Bureau (CRB) checks for staff and volunteers
- Child/vulnerable adults protection
- Grievance and disciplinary
- Environmental

1.9 Do you receive funding for your organisation?

Tell us if you receive funding for your organisation. We want to know if your organisation has any experience in managing grants, donations and other funding.

If you have received any funding over the last 2 years please provide details of where the funding has come from, when you received the funds and the size of the grants.

Section 2 - About your project

2.1 Please give us a brief description of your project

Please provide a summary about your project. Tell us when and where it will take place and what you intend spending the funds on. Will the project be to continue what you do now or for a new project.? We might use this information in publicity material so it should describe, in a few words, what you want to do.

2.2 Is the project for new or existing work?

We would like to establish whether you are applying to fund a new initiative or existing one. Please tick the appropriate box.

2.3 Please provide details of the start and finish dates

Please tell us the timescale of your project. When do you plan to start spending the funding and when will it be spent. It is unlikely that you will receive funding for a project that has a delayed start date unless you are able to give an acceptable explanation for this. If your group is awarded a grant, you will need to have spent the funds within a year of receipt. This timescale may be extended in special circumstances.

2.4 Local Authority area

Please tell us which Local Authority area your project will take place in, or will it benefit people over a wider range?

2.5 In which area (estate, village, town) do most of the people who will benefit reside?

2.6 What is the need for your project and why is this important to your community?

This is your chance to expand on the summary given in question 2.1. What will you be using the grant for? How will this benefit you organisation and, mmore specifically, young people? Tell us about the need for your project. You will be unlikely to be awarded a grant if you cannot identify a need for it. Have you consulted with young people? Does it benefit those most disadvantaged? Are you increasing local services or responding to an economic need for the project? Demonstrate how this is so.

Please note that we are not asking you to provide a budgetary breakdown in this section as the financial details will be covered later.

Tell us how the project you have described in question 2.1 fits into the normal activities of your organisation. We would expect the project to relate to the aims and activities of your group.

2.7 What difference will the project make to the people who will benefit?

Will the project lead to young people being provided with new skills or activities? Will they be able to contribute more to their community? Will they feel less isolated or excluded? How will you keep track of your project and provide us with evidence of how it will benefit young people and its impact?

Section 3 - About the beneficiaries

3.1 How many people currently benefit?

How many people are members of your organisation or participate regularly in the services you offer?

3.2 Primary age group

Please indicate in the box provided.

3.3 Do you make a charge?

Please tell us how much the young people who benefit will pay to participate in the service you provide. Do they pay weekly, monthly or an annual fee? Or will the activities be free of charge? It may be that they pay annual membership but the project is free. Please confirm.

Section 4 - About the budget

4.1. How much are you applying for?

Please tell us how much you would like us to award your group.

4.2 Your project's budget

We need you to complete the outline budget in the table provided. If you cannot recover VAT, include VAT in both columns where applicable. A short explanation of the table is given below.

Staff and volunteer costs - This is where you put any costs incurred by staff or volunteers, e.g. travel, expenses, wages.

Operational/activity costs - This is where you put any costs of the actual activity, e.g. refreshments, workshop costs, transport, training, insurance.

Office, overhead, premises costs - This is where you put any costs for office resources e.g. photocopying, postage, venue rental.

Capital costs - This is for the assets you buy over £1,000 (exclusive of recoverable VAT) and with an expected life of more than one year, e.g. equipment.

Publicity costs - This is for leaflets, websites, marketing and any other publicity costs you might have.

We expect you to be insured to carry out the activities we fund, so if you need insurance for your project, you can include it in the budget under operational costs.

PLEASE PROVIDE SUPPORTING DOCUMENTARY EVIDENCE where necessary (eg for equipment, workshops costs, activities)

4.3 If, in the previous question (4.2), the total cost of your project is more than the amount requested in grant, we ask you to explain where the remainder of the money will come from. You are unlikely to be awarded funding if haven't already secured the balance prior to applying for a grant.

Section 5 – Bank Details

5. Bank details

Please provide full details. We need you to send us a copy of your last set of annual audited accounts and recent Bank Statement. If you don't have audited accounts, please provide us with your last set of annual accounts or income and expenditure details. We will use this information when assessing your application so make sure you send it to us. Please note that we do not accept bank statements as a substitute for your annual accounts/cash-flow forecast.

Do you have a bank account in the organisation's name with two signatories?

We will be unable to fund your organisation unless you have a bank account in the organisation's name that requires two signatures to cash cheques. If you don't have a bank account yet, and you are successful, you will have to open one before we can give you any money. The two signatories must not be related, close friends or living at the same address. Please also provide a copy of a recent Bank Statement.

SECTION 6 - Declaration

Signatures of applicants

Please provide the signatures of the chair, secretary or treasurer of your organisation, who should also be the main contact. By signing the form, these people are confirming that to their best knowledge, all details are accurate. Remember, we need an original signature. Don't use scanned or photocopied signatures, don't sign on behalf of someone, don't type in a signature using a different font in the signature box and don't send us the form unsigned.

What next?

Please ensure that you have completed all sections of the application form, have the enclosures ready and then send a paper copy with original signatures on it, together with supporting documentation, by post to:

Sue Fortune
Lincolnshire Community Foundation
4 Mill House
Carre Street, Sleaford
Lincs NG34 7TW

Note: we must receive all the information requested below with your application form otherwise we might not consider your application. Please also make sure that you keep a copy for your own records. You may need this to complete monitoring information if you are successful.

Checklist: have you enclosed:

- The signed and completed application form
- Any additional papers you used to answer the questions above (evidence of cost)
- Your organisation's set of rules/terms of reference/constitution, including details of the group's management committee.
- Your organisation's last set of audited accounts or income and expenditure details and a copy of a bank statement

Remember, additional information will not be considered and will not be returned to you so please do not send it to us.

Ensure you send all enclosures with your application. If you send additional documents separately, we cannot guarantee that we can match them up with your application.

Grant applicants are protected under the Data Protection Act 1998 and no personal details are given out