

FUNDING APPLICATION FORM GUIDANCE NOTES

These notes aim to help you complete the standard application form for funding. Please read them carefully before you fill in the form. Some questions include prompts to assist completion. The information requested is necessary for us to register and assess your application. If you do not supply the information and documents required on time, your application could be delayed or not fully considered. Please note the closing date(s) announced by each Fund.

If you have any difficulties or questions regarding completing the form, or require any further information please contact the Funding Officer concerned.

Craig Downs, Voluntary Sector Support Officer, CBC. Tel. 01293 438763
Geoff State, VSLDO, WSCC Adult Services (Crawley) Tel. 01293 895171
Sarah Hawke, Primary Care Trust (Crawley) Tel. 01293 572128

1. Contact Details

Address

This should be the main or registered address of the organisation or main contact person if no office address. (Organisations without a main office address may wish to use the address of the person who is the organisation's main contact. In this case, mention elsewhere in the application where the group holds its regular sessions or meetings).

Contact Person

The contact person should ideally be the organisation's Chief Officer, Manager, Coordinator or Organiser, or someone else who is knowledgeable about the details of the application (e.g. a Trustee, Management Committee Member or Charity Company Director).

2. Organisation Profile

Organisation Status

If your organisation is newly established or informal, to be eligible to apply for a main or large grant (e.g. for CBC this is over £750; for WSCC Adult Services this is over £1,000 – typical maximum of £5,000) you must have an agreed constitution/governing document, a bank account in the name of the group and a system for financial reporting and accountability.

Organisation's Main Purpose

The aims and objectives of your organisation as specified in your constitution/governing document.

'Management Committee' Description

This refers to the group of people responsible for the control and direction of the organisation (it may be known as the Trustee Group, Management Committee, Board of Directors, etc). Please detail the number and status (e.g. appointed, elected or co-opted) of management committee members together with any

relevant comments as to its make-up, such as service users, people with disabilities, minority group representation.

Volunteers

Any unpaid person (excepting appropriate out-of-pocket expenses) engaged in the ongoing management of the organisation or regular delivery of services counts as volunteer support.

Equal Opportunities

Please send us a copy of your organisation's equal opportunities policy statement. If there is no statement, please say how you will address equality (equal opportunity / fairness / impartiality) issues for your service. Applications without an agreed policy statement may result in no award or an award with special conditions.

Internal Financial Controls

These are the agreed practices for managing money and resources and help to ensure *accountability* and *transparency* in the organisation's financial management, e.g. ensuring cheques are signed by two signatories.

The Charity Commission's website gives useful guidance if needed.

<http://www.charity-commission.gov.uk/>

3. Work Activity

Background

You may already have detailed information in the form of a service, project or business plan; (if so) in this section please provide an outline or summary. You may append the full details to your application.

Need for Activity

This can be evidence that your organisation has gathered to support a particular proposal or evidence (e.g. reports, articles, surveys) of third parties. For example, you may refer here to any sources such as published research and your own monitoring or direct experience of staff, volunteers or service users.

It is necessary for you to have looked into and established the availability, or otherwise, of any known similar service to avoid duplication. An organisation working together with others to develop services however is generally accepted as good practice.

Planning Future Activity

This is how you have involved people in shaping your plans such as consultation. It should also say what you intend to do during the period of funding to involve intended beneficiaries and other stakeholders (interested parties) in future.

Please provide details of the consultation methods, dates and the numbers of people [to be] involved.

Funding Priorities

Refer to the criteria for funding as published by the funders (CBC/PCT/WSCC) and say how your activity will contribute to the specific priorities. Focus on the strongest link(s) rather than attempt to satisfy all of those listed.

For example, further information on Council's plans such as the Cultural Strategy is available on www.crawley.gov.uk

If you are not clear about links to the LSP you may wish to refer to www.crawleytogether.org.uk for further information.

Beneficiaries - Monitoring Activity and Measuring Impact

Describe any formal and informal monitoring methods used by your organisation. Outcomes may be measured by quantitative (e.g. statistical data) or qualitative (e.g. user satisfaction surveys) means. Please state what your success factors (or key service indicators) are and how/ when/ by whom they will be assessed.

4. Financial Information

Please give 'true and fair' (as full as possible) details of your organisation's income and expenditure for the current financial year and for each budget as applicable.

Restricted funds

These are funds subject to specific trusts which may be declared by the funder(s)/donor(s), or with their authority (e.g., in a public appeal), but still within the objects of the charity. The funder will specify if the award is to be treated as 'restricted'.

Un/Designated funds

Designated funds are amounts that the organisation has decided to 'ring fence' (allocate) for a specific purpose. *Undesignated* funds are available for general purposes (without restriction by funders/donors) or as 'free reserves' (considered as discretionary funds). You will need to detail and justify all designated funds and undesignated funds above 3 months general running costs.

5. Budgets

Show your *current year* budget and a budget for *each year* of funding as requested. If any costs are increased above the annual rate of inflation (RPI) please detail this in the notes section (or separately).

If you are intending to purchase *equipment or contracted services*, you will need to send copies of two independent quotes or estimates (you may include a small contingency for inflation).

Trusts, Companies and other Sources of Funding - The status of other applications should be stated as either '*intended*' (in draft form / to be submitted within 90 days), '*lodged*' (applied for / awaiting decision), '*awarded*' or '*declined*' (send a copy of all award/refusal letters)

6. Link Officer / Reference

Please identify someone who is knowledgeable about your services but who is not a service user, Trustee or (Charity) Company Director of the organisation.

7. Declarations

Applications must contain signed statements by the main contact and another person authorising on behalf of the organisation to be accepted.

8. Closing date(s) – are final unless otherwise indicated or varied by the funders.