

Trusthouse Charitable Foundation



*Giving your Application
the Best Chance*

The basics

We aim to support

SMALL and ESTABLISHED

organisations running projects and activities
which address a **clear case of local need** in areas
of **rural isolation & poverty**
or **extreme urban deprivation**

What does 'small' mean?

- If you are looking for a grant for **running costs** – which includes salaries, overheads and project costs:
 - for Small grants of £5,000 or less **your total annual income must be less than £100,000**
 - for Standard grants of £5,001-£9,999 **your total annual income must be less than £500,000.**
 - *If you are part of or affiliated to a larger organisation with an annual income above these limits, you must have your own accounts and confirm that you are not able to use the funds of the larger organisation.*
- If you are looking for a grant for **capital costs** – which are one-off costs for building projects, including buying a building, repairing it or fitting it out:
 - for Small grants of £5,000 or less **your total annual income must be less than £250,000**
 - for Standard or Large grants of £5,001-£40,000 **your total annual income must be less than £5 million.**
- For all capital grants, **the total project cost must be less than £1 million.**

What does 'established' mean?

- We do not fund the set up costs of new organisations, so your organisation must be up and running and delivering its work to its target audience. We would expect you to have the in-house expertise to manage the administration of the organisation, though you may 'buy in' expert help to deliver your work e.g. session tutors, payroll companies.
- You should have a track record of success. You might show this by:
 - *statistics such as decreasing levels of crime in your area; fewer unemployed young people; improved health figures; lower figures for teenage pregnancies*
 - *telling us about changes in attitude in your community: better relations between young people and older people; people having a sense of pride and ownership in their local area*
 - *giving us a typical case history of someone who has been helped by your work.*
- You must provide either your latest annual accounts or, if you have not been operating for a year, your latest management accounts and bank statement. Your accounts must show your income and expenditure and what funds you have in reserve.
 - *projected cash flows are not acceptable alternatives to the above items*

What does 'clear need' mean?

- You must show that the work you are doing is relevant to the problems of the area by:
 - telling us about the **problems of the area and how this project addresses these** e.g. a homework club in an area where there is low educational achievement and children find it difficult to do schoolwork at home due to overcrowded living conditions
 - telling us **what research you have carried out to check local interest in the project** e.g. a postal questionnaire, a street survey, talking to current participants, talking to local businesses.

Rural Isolation & Poverty

- What we mean by **Rural**
 - remote and small communities of less than 10,000 people
- What we mean by **Rural Isolation: examples**
 - lack of local facilities (shop/post office closed)
 - poor transport (few or no buses)
 - lack of things for young people to do (and anti-social behaviour as a result)
 - ageing population with older people isolated and lacking social contact
 - recent housing developments which have created tensions between new and long-standing residents
 - Indices of Multiple Deprivation support your claims to be isolated (e.g. in the bottom 20% for Barriers to Housing/Access in the English Indices of Multiple Deprivation)
- What we mean by **Rural Poverty**
 - your area is ranked in the bottom 50% of the Indices of Multiple Deprivation: we are unlikely to give priority to applications from areas not in this categoryOther examples:
 - lack of local jobs (and therefore people moving away)
 - jobs that are available are mainly low paid and/or seasonal
 - lack of local affordable housing
- *Making Your Case*
 - you will need to show that your project is addressing at least one of the problems you highlight
 - **don't forget we might not have ever visited your area, so it is important you tell us what it's like and what it's like to live there**

Example 1: a Rural Village Hall

- You are a member of the committee of a village hall based in Llanfair in mid Wales, which has 370 residents. The nearest town with post office, doctor and supermarket is 11 miles away. There are two buses a day during the week and none at weekends. Llanfair's own small shop closed last year when the owner retired. The majority of Llanfair's residents are aged over 50, and 25% are over 75. However, some social housing is being built in the area, and several younger families have moved in during the last 18 months, and more are expected. There has been tension between the long standing residents and recent arrivals. Local incomes are low – from pensions/benefits, seasonal work at a large conference centre 3 miles away, or agricultural labouring.
- The village hall plays a critical role in keeping the existing community alive and could do much in encouraging newcomers to feel welcome and involved. There is a weekly luncheon club for older people; the local GP practice holds a weekly surgery; the local choral society and indoor bowls group meet there. A mums and toddlers group has just started up.
- You have carried out a survey of residents and everyone supports the hall, and they have lots of ideas for additional activities as the younger families want something aimed at them, while the older people need an advice service, and would also like to try some different indoor activities.
- Another suggestion is to open a community shop, where people can buy essentials and local produce (there are various local farms who have expressed interest). This would bring the community together, offer opportunities for volunteering and work experience for younger people, and address the lack of transport for reaching the shop in the local town.
- You have therefore decided to remodel the village hall, adding a large extension to house the new shop, upgrade the old fashioned kitchen and create additional rooms for new activities, such as a weekly advice session run by Age UK, and cookery sessions with older residents teaching newer residents local and traditional Welsh dishes. There will also be a programme of social events through the year to help the self-sustainability of this remote community.

Urban Deprivation

- What we mean by **Urban**
 - suburbs, towns and cities of more than 10,000 people
- What we mean by **extreme Urban Deprivation**
 - areas ranked in the bottom 20% of the Indices of Multiple Deprivation
 - this deprivation could be caused by:
 - problems with employment e.g. low wages; high unemployment rates; families with several generations out of work; few local work opportunities; young people lacking a work ethos
 - problems with relationships e.g. teenage pregnancies; culture of lack of thought for neighbours; high levels of domestic violence; dysfunctional families; poor parenting skills
 - problems with health and education e.g. high levels of cardiac illnesses; low educational achievement; excessive drinking culture; drug abuse rife among young adults
 - problems with the environment e.g. low grade social housing stock; overcrowded living conditions; little open space for safe play
- *Making Your Case*
 - tell us your rank in the relevant Indices of Multiple Deprivation; show how the statistics translate into everyday life for residents
 - what are the particular problems in your area and how is your project tackling these?
 - **remember we may never have been to your local area, so you need to explain what it is like to live there**

Example 2: an Urban Community Centre

- You represent a community centre founded in 1986 in an area of the West Midlands. Originally the area was built to house workers at two big local factories, but these both closed in the 1990s. Some families have never managed to find other work and most others are in low waged jobs.
- You provide a range of activities which you have changed over the years to suit the needs of local residents. When you first started up, there were serious problems with anti-social behaviour from teenagers but the youth club you run 4 evenings a week has seen the crime rate drop by 70%. Some of the original attendees are now volunteering at the youth club, and one has gone on to become a full time Youth Worker.
- Recently you identified that the current most pressing local problem is young families in financial difficulties due to unemployment, so you have started a weekly benefits and debt advice session and worked with the local Credit Union to offer loans at affordable rates when needed. The benefit advice scheme has brought in an extra £100,000 for residents in need, and a doorstep lender who was offering loans at an interest rate of 145% has stopped coming to your area.
- You want to continue the financial advice service, and expand it, involving the local secondary schools to give pupils in Year 10 and above basic financial management skills in budgeting and saving.

More on Deprivation

We have referred to the 'Indices of Deprivation' in the previous slides. We use the various Indices of Multiple Deprivation provided by the national statistics offices of the constituent countries of the UK. These Indices provide us with a consistent and fair method of assessing a big spread of projects over the whole of the UK.

We will check the deprivation statistics for the **postcode** you give on the application form. If you want to check these yourself, here are the website addresses we use:

- **England:** www.ons.gov.uk. Look for the 'Find statistics for a local area or region' on the Home page, and enter your postcode in the 'Get data for your local area from Neighbourhood Statistics'. Click on the 'People and Places' tab and scroll to the bottom of the screen where you will find a scale. Hover your mouse over the pointer and it will give you the ward rank for your postcode. 1 is the most deprived area, 32,482 the least deprived. For rural areas, your postcode should register under 16,000 and for urban areas, under 6,500.
- **Scotland:** <http://www.gov.scot/Topics/Statistics/SIMD/SIMDPostcodeLookup/ScotlandPostcodeLookup>. In February 2015, the Scottish Government changed the way it provides the Scottish Indices of Multiple Deprivation. You may therefore find it easier to ring your local authority and ask them to provide you with your local ranking based on your postcode. Alternatively, use the website link above to find the relevant page on the new site. Once there, in the File box, click on 'open'. A pop up box will ask if you want to open or save the file. We suggest you click on 'open'. The spreadsheet takes a while to open, but you then click on the Excel spreadsheet and enter your postcode. The rank we are interested in is in the column headed 'SIMD rank 2012'. For urban projects your rank should be below 1,300 and for rural projects below 3,250.
- **Northern Ireland:** www.ninis2.nisra.gov.uk/public/home.aspx. Enter your postcode in the Quick Profile box on the Home page. Select the Ward tab, then the Deprivation tab. The Multiple Deprivation Measure gives you your ward rank: 1 is the most deprived and 582 the least. For urban projects, your ward should be ranked under 120, and for rural projects under 290.
- **Wales:** <http://wimd.wales.gov.uk/> Enter your postcode in the 'See deprivation in your area' box. Click on your area as shown on the map and your local ranking will be shown on a scale at the bottom. There are 1,909 wards in Wales for urban projects, your ward rank should be below 380 and for rural projects under 950.

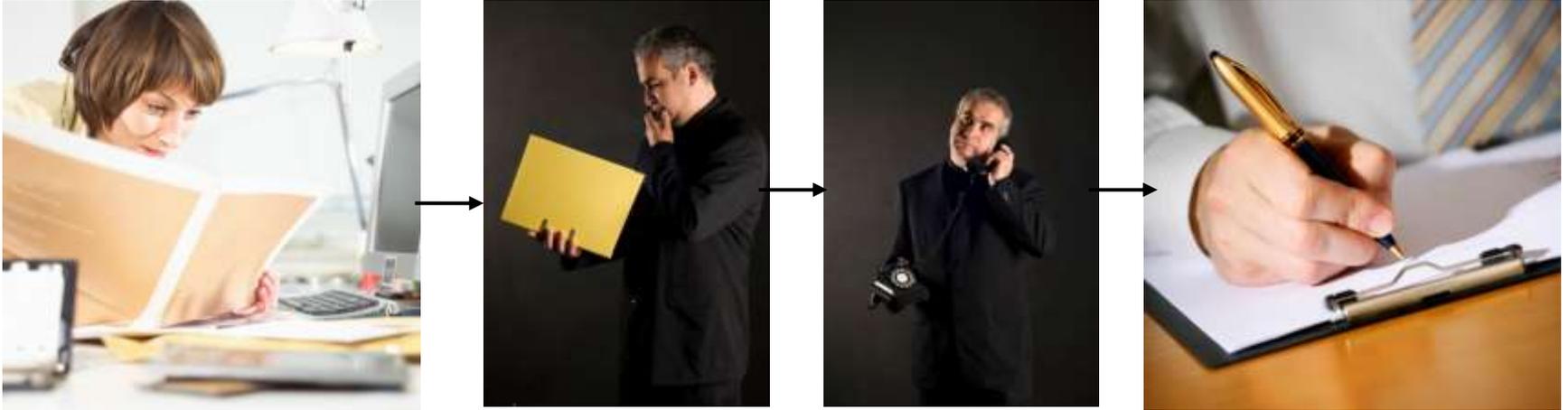
And more on Deprivation

- When looking up at your ward rank on the Indices or asking your local Council for local data, you will probably also find other statistics relating to crime, education, health and living environment which can help make your case to us for a particular project. We therefore recommend having a look at the other statistics these sites show: they might surprise you! **However, we stress that it is your ranking on the Index of Multiple Deprivation which will determine if your area falls within our target category, not in these sub-Indices.**
- If your postcode is not the same as the area in which you are working (for example you may be fundraising for a local project which is located in another area, but you are dealing with all correspondence), you need to explain this in a covering letter, and give a postcode in your work area. This might be for a school, a GP's surgery, a community centre or a post office. You can also give us alternative postcodes if the majority of your users live in a different area (such as a social housing estate) while your offices are based in a different location.
- When describing your area in the application form:
 - remember we may not have been to your area and will not know what it is like to live there. Be specific about your local problems, using the statistics to give us hard facts but also telling us how these translate into everyday life.
 - if you are applying for a project focussing on people with physical or learning disabilities, you need to show us the problems of the geographical community, and how these further disadvantage your members. Projects which bring your members together with the wider community to break down barriers of misunderstanding can fit in with our theme of community benefit.

So are you eligible?

- If you are applying for a **Small, Standard or Large grant**:
 - on our website, you will be asked to complete some questions to determine generally if your project is eligible and which grants programme is appropriate
 - this filter is only for **basic general criteria**. It is very important that you read through the whole of the Guidelines and this document to further check your eligibility
 - if you are still unsure, please feel free to ring us for an informal discussion. We will not be able to confirm you will receive a grant; we will only tell you whether or not your project fits in with the current funding priorities.
- If you are applying for a **Hospice grant** or **Community Centre/Village Hall grant**, you download the form direct from the relevant page on the website without going through the eligibility filter. It is therefore essential you read through the Guidelines and form carefully to ensure that your project meets our criteria.

Filling in the Application Form



- Read it...
- Think about and research it...
- Query it...
- Write it!

The Application Forms

- We have five different application forms.
- Once you successfully complete the eligibility filter, our website will automatically direct you to the relevant Small, Standard or Large form, based on the answers you give on the filter.
- The forms are:
 - Small Grants: grants of £1,000 to £5,000 for both revenue and capital projects
 - Standard Grants: grants of £5,001 to £9,999 for both revenue and capital projects
 - Large Grants: grants of £10,000 to £40,000 for capital projects only

Wrong form? If you think you should have a different form, try starting the eligibility filter again and check your answers.
- On separate pages of the website you will find the forms for:
 - Community Centres & Village Halls: capital grants of £5,000 to £40,000. (If you are seeking an amount less than this, you need a Small Grants form if you have an annual income under £250,000)
 - Hospices: capital grants only for £5,000 to £40,000.
- You cannot alter the size of the answer boxes on any of the forms, but the number of characters each box allows you to enter is included at the bottom of each answer box.

Read It

- Depending on the type of internet browser and software you have, you may **NOT** be able to save the application form, but you can print a copy off and **read through the questions before you start to complete it.**
- We strongly advise you to do this, so that you can clearly see all the information we need and draft your answers.
- Even if you can save the application form, we do not accept applications by email, so you will need to print it off and send it to us. *Don't forget to sign your form!*

Thinking and Research

- Once you had read the form through, take some time to think about the answers you will give. What do you need to say to explain your project and show that it is relevant to Trusthouse's funding priorities?
- Plan your answers based on the space we have given to each question. **You cannot change the amount of space given on the form. We do not accept additional sheets of information.**
- Check your facts: how much is the total project cost, how much have you raised and what is the amount of the grant you are requesting? You may need to consult with other project members to gain all the necessary information.
- You will need to have secured a minimum of 50% of the cost of the work for which you are applying to Trusthouse. We prefer to see that other funders are involved, rather than you using only reserves for this 50%.
- **If you cannot save the form, you will need to complete the form in one sitting. Making sure you have all the information and facts to hand before you start inputting is essential.**

Queries

- If you have any queries when you have read through the Guidelines and the application form, please call us. We want to ensure you don't waste your time on an application that is not eligible or doesn't fit our funding priorities.
- Please be patient when you ring us: we have a very small staff (just two!) so do leave a message on our voicemail and we will call you back as soon as we can.

Completing the Form: 1

The next screens will take you through each of the questions on the Small, Standard and Large Grant forms, and will hopefully explain what information we are looking for.

Name of organisation: This is the name we will print on any grant cheque, so please ensure that it is the same name as on your organisation's bank account. Note also that if you are registered charity or company, we will be checking your details against official registers and you may need to explain why you are using a different name to the registered name.

Contact details: As we may wish to contact you for further information, please ensure that the contact details you give are for the person best placed to answer any queries. Extra information is usually requested by email, so do give an email address that is checked regularly.

Correspondence address: Unless you want all letters from us sent to you direct rather than the address of the organisation (e.g. if you are a volunteer fundraiser working from home) this box can be left blank.

Small Grants only: Total Annual Income: this is the entire income for the whole of your organisation, not just the income received for a particular project. Remember that under the Small Grants scheme if you have an income under £100,000 you can apply for revenue or capital costs; if between £101,000 and £250,000 only for capital costs.

Type of organisation: As stated above, we will be checking your details against official registers if you are a registered charity or company. Please ensure that you give the correct number. If you are a voluntary organisation, we may later ask to see your constitution, but you should not send this with your application.

Year founded: This is the year you were set up, not the year the organisation became a registered charity or company etc.

Disclosure and Barring : If you are working with children, people with disabilities or any other vulnerable groups, you must have a thorough policy of checking staff and volunteers using the current checking mechanisms available through statutory agencies. We may ask later to see your Safeguarding Policy. We are not able to give a grant if we have concerns about your policy or systems on this issue.

Completing the Form: 2

- **About Your Organisation: What does your organisation do?** You should describe in straightforward terms what your aims are and what services or activities you provide to achieve these aims. Avoid simply giving your 'charitable objects' as they are written in your founding document, as these do not always give us a clear idea of what your aims actually are or what you do to achieve them. For example your Memorandum and Articles might state: "The relief of persons suffering from disability and the amelioration of their position through educational activities". This really doesn't explain very well what you do, but the following would:

We work with young people with disabilities to enable them to access employment and volunteering opportunities. We run training sessions every morning in food preparation, hygiene, horticulture and customer service. The afternoon sessions concentrate on job searching, work experience placements and help with benefits.

- **Your Community And The Area:** Have another look at the pages in this document on Rural Isolation and Urban Deprivation. We are looking for a blend of statistics (see the page 'More on Deprivation'), a description of the problems of the area and how these translate into what it is like to live in your area. For example:

Grossby was built in the 1930s as a satellite town for workers from the factories in Chawstinbury. The factories started to close down in the 1980s, and by 2004, there was only one of the original factories open. The area is ranked 467 on the Indices of Multiple Deprivation and the local Council has prioritised the area as its most deprived. Child poverty is given by the local Council as 35% and over 60% of primary school children are entitled to free meals. There are a significant number of families (approximately 25%) who have experienced generational unemployment, are benefit dependent, who have few aspirations and have passed on a culture of non-achievement to their children. Educational achievement is low with high levels of exclusion and truancy. Drug abuse among adults in their 20s and 30s is rife; teenagers and older people have drink-related problems. Crime rates are high in petty crime and anti-social behaviour. There have recently been increasing tensions in the community between residents and an influx of Roma travellers, following the opening of a travellers' site on the outskirts of the area. The local community centre was the subject of an arson attack in 2006, and was derelict until 2008 when a group of residents came together to re-start the centre and offer a range of activities. Progress in addressing the ingrained problems has been difficult, but we are beginning to see small changes: this year for the first time our school met the national average for students gaining grades A-C at GCSE level.

Completing the Form: 3

- **The Impact Of Your Work:** in this section, we want you to give us the evidence that your work is successful and what impact it has a) on the people who directly participate and b) the local community. You could tell us, for example, that 20 young people stopped being NEET last year after attending your courses and have found employment, or that 200 older people were helped to claim benefits totalling £120,000. We are looking for solid evidence of impact so we will not usually find general claims such as “people say they feel a lot better after attending our counselling sessions” helpful. We would like to see instead something like “using our feedback forms, 87% of clients confirmed that their mood had improved significantly and 20 clients have been able to return to employment or take up volunteering opportunities.” If you have space in the section, you could also highlight a case history, but this should not form the whole of your answer. We are not especially interested in awards or quality standards you have achieved, nor of funding you have received. This section also shows us that you keep track of whether or not you are succeeding in your aims.

Here is an example of the type of answer we would like to see:

Since we re-launched the community centre in 2010, there has been considerable improvement in the area. Our activities for 50 young people a week have seen a drop in anti-social behaviour (as the police have noted); our community celebration days for summer, Christmas and Eid have brought different generations and cultures together and older people have organised their own regular cross-cultural talks and events, which have reduced social isolation and misunderstanding. 300 people a week now take part in educational activities including IT and literacy, and 52 people achieved qualifications up to GCSE level in 2015. A one-off project to improve the neighbourhood which involved re-planting a communal area and creating a 'heritage graffiti' wall has seen a real air of pride and commitment to our area with a drop in vandalism and littering.

- **Total number of clients/users of your services in the last year** You should tell us how many people actually participated in the activities/services. If you are an Arts organisation, you should not include audience numbers in this total as we count this as indirect participation. You can, however, include audience numbers in the Impact Of Your Work section.

Completing the Form: 4

- **Your Grant (Small and Standard application forms): Describe the project for which you are applying for a grant.** We need to know exactly what you are applying for a grant for and what our funding would be spent on. Your project should relate to the problems of your area which you described under the previous question. For example, here is a community project in Grossby, the town described earlier:

We want funding to continue and expand our after school homework club. We are very proud that the club is acknowledged by the school in playing a key part in the improvement of GCSE grades. We offer a quiet, relaxed place for 30 young people aged 14-16 for three afternoons a week from 4pm to 6pm. Sessions start with a fun quiz to engage everyone, and then a quiet hour with help on hand from adult volunteers to go through homework. There is a break at the end of the hour with a healthy snack – we know for some of our youngsters this is the one healthy meal of the day they will have. The second half of the evening offers a learning session on a particular topic that the young people have asked for (science, literature, languages) delivered by teachers from the local independent school with whom we have arranged a partnership for the club. A-level students from the independent school also attend and provide support to our students. This is having a noticeable effect on the aspirations of our students and greater understanding of the educational and training opportunities open to them when they finish school. As well as wanting to continue the sessions, we want to add a weekly Saturday session for 11 year olds, with a one hour study session, followed by an hour of sports activities. We are seeking funding for session staff to run the Saturday group.

If you are seeking running costs and especially salary costs, we would need to know the importance of these roles in delivering your services. Thinking of Grossby again, here is a request for salaries:

We are applying for the salary of our Centre Manager, the one full time paid member of staff. She is the driving force behind everything we have achieved, and has a very high reputation with both our users and the statutory agencies with whom we work. She works with our users, either directly through the services we provide (especially our advice sessions for young parents), or talking to them to determine what they want the centre to do to help them. She meets with statutory agencies such as the police, local education officers, social services and community regeneration team to hear what their plans are, pass on the views of the local community and has set up a community forum to deliver views directly as well. Her work with the local school in working on activities which engage young people and open up new possibilities for them is having a significant impact on the culture of the community. She manages our volunteers and is in charge of all administration for the centre as well.

- **Your Project (Large Grant application form)**

We are looking for a factual description of the works to be carried out e.g. replacement of the roof, building an extension which will create two new rooms and additional storage space, purchase of a minibus.

Completing the Form: 5

More tips on completing the Your Project description section

- Make sure there are enough practical details for us to understand how you will deliver the project e.g.
 - *The parenting course will run twice a week, for two hours, over 10 weeks. There will be 6-8 people for each session*
 - *The performance skills group for our homeless clients will be delivered every Tuesday morning, with a trained facilitator leading the group with the help of two volunteers.*
- Don't just put 'running costs' in this box. You need to describe fully what costs particularly you are seeking.
- Use all the space in the box to fully describe the work and to make your case.
- **If this is a new project, service or employee role, why have you decided this is needed?** We need to know that you have researched the need for your project, through your own knowledge of your area, with current and potential users, and any statutory agencies which could contribute to the success of the project. You may have used surveys and questionnaires, feedback forms or the results of outreach work. We also need to be confident that your organisation has the skills to successfully deliver the project. Using Grossby again as an example, here is a typical response to this question:

We were approached by the local school to run the Saturday sessions, as many of the 11 year olds struggle to make the transition from primary school, and bringing pupils together in an informal and fun environment will help them make friends, catch the 'learning bug' and be more positive above school. We have spoken to the 11 year olds who attend our weekly after school play session and they asked if sports could form part of the Saturday sessions. We will be employing a retired teacher to run the study sessions and an experienced sports coach from the independent school has agreed to run the sports sessions, training some of our young adult volunteers to take coaching qualifications themselves, so in the long term they will be able to manage the sessions, with some support from older volunteers.

Large Grant applicants should provide a list of what additional services they will provide as a result of their capital project e.g. an extra minibus for a community transport scheme could extend the scheme's reach to three more villages; new equipment at an adventure playground could enable children with disabilities to take part in activities. Large Grant applicants should clearly describe the **consultations** they have undertaken with anyone making use of the new facilities to ensure these are relevant and wanted by the local community. For example, "we asked all the children and parents currently using the adventure playground, plus the local Special Educational Needs School, about the interest in providing more inclusive equipment, and there was strong support for re-organising the playground so all abilities could access it. 50 children would have the opportunity to use the playground more fully."

Completing the Form: 6

- **Small and Standard grants: How are people made aware of your services?** Having a plan to make sure your potential users know the service is available is crucial. You may be advertising in local papers, on noticeboards in your own venue or local community centres, receiving referrals by referrals from other voluntary or statutory services, by leaflets distributed through GPs' surgeries, other agencies etc. You might encourage young people to attend a youth group through street-based outreach work, you might use fun events or informal projects to attract people towards services which address more deep-rooted problems. For example, here is a drop-in centre for homeless people which is looking for funding for a structured project to help its clients towards independent living:
Help At Hand is well-known among the local homeless and vulnerably housed population and we have a strong presence in the high street, with a shop frontage. We carry out evening street work to rough sleepers and build up relations with them, continuing to build up trust with individuals attending our daily drop in. We run afternoon sessions in arts and crafts, and through these we can gently steer clients into taking part in group activities such as drama, IT use and eventually into one-to-one sessions tackling addictions and finding supported accommodation.
- **Small and Standard grants: How do you and will you encourage people to participate?** Making people aware of a project is one thing; actually seeing them participate can be quite another! You might have a number of different ways of helping people to take the big step of walking through your doors. You could have staff or volunteers who attend the activities at the beginning with clients, longer standing participants act as 'peer buddies', reception staff might be trained on how to welcome new members etc.
- **Small and Standard grants: What other local organisations you are working with?** We expect that most applicants will be working with other organisations to obtain input on the shape of a project, to identify applicants, to benefit from other organisations' advice and expertise, to demonstrate the standing of your project. We are not particularly interested in organisations 'which have expressed interest' as this may come to nothing, but we do want to hear about firm partnerships or existing informal understandings already in place. You need to name the organisations you will be working with. Here again is Grossby's description, as an example:
We have worked with Grossby High School for 3 years now and with Highshire Independent School for the past 2 years. Grossby Education Authority have provided advice, referred potential volunteers and vetted sessional teaching staff for us. We have recently agreed a contract with the Pupil Referral Unit. We work informally with Social Services and have recently agreed to provide a venue for a children's counselling charity which will offer confidential sessions at our after school club for teenagers.
- **Large Grant applicants: What is the timetable for the project?** Because we expect grants to be claimed within 12 months of being awarded, we need to be satisfied that your timetable fits in with our schedule. For building projects, tell us roughly when you expect each stage to happen e.g. tenders received February; contractor selected March; work to begin May; completion in August.

Completing the Form: 7

Funding the Work

We stress it is **essential** that you have secured a minimum of 50% of the cash funding you need for the total cost of the work for which you are applying to us. The funds can be in your bank account or have been pledged. We do not count in kind donations nor loans as part of the 50% secured funds.

- **What is the total cost of the work you are requesting?**
 - If you are applying for running costs or salaries, you should enter the total annual cost of these.
 - For capital projects, please enter the total cost of the works, not just the element you are seeking funding for.
 - If you have a multi-phased capital project, you should only provide the figures relating to the phase for which you are applying to Trusthouse. Funds raised for earlier phases should not be included in the current secured amount.
 - The total cost should be the cash cost of the project, and not include volunteer time or goods in kind.
- **What is the grant amount you are seeking?**
 - we are unlikely to consider requests for less than £1,000
 - there is no guarantee that if a grant is made to you, it will be for the amount you request. The final amount depends on the funds we have available, your funding shortfall and the strength of interest our trustee have in your project.
- **Who else is funding this project?**
 - we expect you to have applied to local sources of funding before applying to us. We would like to see that you have local fundraising initiatives under way e.g. sponsored events, bag packs, monthly donations from supporters etc.
 - please give the actual names of other funding organisations rather than 'trusts and foundations'. We prefer to see that you have a portfolio of funders, rather than being over-reliant on one source.
 - ideally we like to see that you have some multi-year funding in place for running and salary costs (especially for youth and disability projects) to give an element of stability to your work
- **Large grants: If running costs will increase, how will you raise these?** If you are enlarging a building or adding an additional vehicle, the likelihood is that you will have higher costs for heating, lighting, extra staff, fuel etc. It is important to show us that you have taken these extra costs into consideration and what your plan is for raising these: we need reassurance that we will not fund a project that is economically unworkable.

Completing the Form: 8

Measuring Your Success

We want to know that you have both targets for your work and a plan on how you will measure these targets. We think it is important to encourage you to think about gathering hard evidence of the success of your work, as this can inform your future plans and open up doors for accessing funding from statutory and other sources.

- **What methods will you use to measure your success?** This could be as easy as keeping a head count of numbers for different activities, but we would really like to see you also using customer feedback surveys at least ('customers' could be direct clients and/or other organisations referring participants to you). You might also want to look at recognised sector measures, such as Outcome Stars. We will always expect counselling services and other projects relating to the improvement of mental health to use a recognised system.
- **What are your measurable aims for this work?** This could be number of users, number of participants completing a course, numbers entering employment or volunteering, timetable for the completion of phases of a building project.

Governance and Management

We want to be satisfied that you are a robustly run organisation, governed in accordance with the required standards of a charity, registered company or recognised sector standards. If you provide full annual accounts, you will probably be able to skip most of this question as the information will be in the Trustees Report, but it is essential to double check. We are looking for brief, factual answers in this section.

Declaration and signature

You must sign and date your application form, to confirm that you have read and understood the general terms under which we make grants as given in the Declaration.

Budget and Accounts

Budget for the work

This should be given on one side of A4. The budget should cover the whole cost of the work or project, not just the amount for which you are applying to us. If you are applying for running costs, provide a budget for all your running costs.

Accounts

- Send your latest annual accounts. These must show your annual income and expenditure for the year (Statement of Financial Activity) and the assets and reserves for the year (Balance Sheet).
- If your accounts are more than 12 months old, please also send your latest management accounts or your draft annual accounts for the latest financial year.
- If your organisation has been running for less than a year, please send your latest management accounts and a copy of your latest bank statement. If you cannot provide these items, we regret that you are not currently eligible for funding.
- If your accounts show that you have more than 6 months' unrestricted reserves, your application is unlikely to be treated as a priority unless you explain the need for holding reserves at such a relatively high level. You might, for example, be fundraising towards a large capital project.
- If your accounts show that you have less than 2 months' unrestricted reserves, you will need to explain what steps you are taking to raise these to the generally accepted 3-6 months. Alternatively you might be funded project by project in restricted funds, but you will need to confirm this.

Covering Letter

You are welcome to include a covering letter with your application, but you should not use this to replace fully completing the application form. You can include information which:

- clarifies or explains your accounts (see above)
- explains why the Charity Commission website records show you have been late submitting the Annual Return and/or Accounts in the past three years including what steps have been taken to ensure this does not recur.

Anything else?

- Please do NOT:
 - send us DVDs with your application: we simply do not have the time and staff resources to watch these
 - include more information on additional sheets. Additional sheets of information will not be read or taken into account in the assessment of your application
 - refer us to websites for information rather than completing the application form
 - send your Memorandum & Articles of Association, your Constitution or any policies such as Safeguarding or Equality. We will let you know if we need to see these once the initial assessment of your application is complete.
- If we have any queries on your application or need any further information, we will contact you by email, so please ensure the email address you provide on the application is checked regularly.
- We will send you an acknowledgement of your application by postal letter within 2-3 weeks of receipt. If you have not received a letter within 4 weeks, the likelihood is the application has gone missing in the post. We strongly recommend that you always keep a copy of your original application, so that you do not have to re-draft it if the original does get lost.
- If you think there is other information which you would have found helpful to be given by Trusthouse, please let us know. We aim to make the application process as simple as possible and your feedback is therefore helpful.