



# Old Luce Community Fund

## Small Application Form Guidance (£500 - £10,000)

Please read the Fund Factsheet and the following guidance notes before deciding whether or not to apply. Occasionally, application materials are revised or changes made to the grant programmes we run. Please check our website at [www.foundationscotland.org.uk](http://www.foundationscotland.org.uk) for information about any recent or forthcoming changes.

All sections of the application form must be completed. Incomplete applications may be returned.

Do not state 'see attached' on any part of the form as a substitute for information – however if you wish to include other documents (besides those listed in the checklist on page 5) with which to support your application then you are welcome to do so.

### Section 1: Contact details

#### **Name of organisation**

We can only consider applications from constituted organisations. The name of your organisation should be stated as it appears on your constitution (or governing document or set of rules).

#### **Main Contact**

The main contact should be the person who is best placed to provide further information about both the grant request and the organisation. This is the person we will contact by phone to discuss the application. Please make sure they will be available and let us know if they are away for any time between the submission deadline and notification date (see above).

#### **Position**

This should be the position the main contact holds in the organisation e.g. your job title if you are a paid member of staff or, if you are a volunteer, your role within the group.

#### **Tel (main)**

Please provide the phone number that you can be contacted on during the day. This could be a landline or mobile.

#### **Tel (alternative)**

Please provide an alternative phone number to the main phone number provided above. This could be an alternative landline or mobile.

#### **Email**

Please provide the email address for the main contact person for this application.

### **Website**

Please provide the website address of your organisation. If the organisation does not have a website address then please leave blank.

### **Correspondence address**

This may differ from your organisation's fixed address should you prefer correspondence relating to your grant application to be sent to a more convenient address, for example, your organisation's premises may only be open during certain days/times in the week.

### **Organisation address**

If the correspondence address provided above is the home address of the main contact then please provide the organisation's fixed address here.

## **Section 2: About the organisation**

### **In which local authority area(s) do you work?**

Please state which local authority area(s) your organisation exists to benefit. If you are unsure which area(s) your organisation benefits, this should be stated in your governing document.

### **When was the organisation established?**

Please provide the month and year your organisation was formally constituted.

### **What type of organisation are you?**

Please select the most appropriate legal status/structure of the organisation. Your group does not need to be a registered charity to apply for a grant; however, your group should be a non-profit organisation with charitable aims and objectives, and this should be reflected in your constitution or governing document, which you must send us with the application form. **Please ensure the governing document you send us is the most up-to-date version, as adopted by the organisation.** If you are unsure if your group is eligible, please contact us for advice.

### **How many of the following are involved in the organisation (numbers)?**

- Staff: Part time staff are considered those who work 16 hours or less each week, full time are those who work more than 16 hours each week.
- Management committee: your organisation must have at least 3 management committee members to be eligible.
- Volunteers: this number should not include voluntary management committee members.

### **Briefly describe the purpose of your organisation, outlining the main activities/services you provide.**

Please do not simply copy the aims and objectives from your constitution. Please try and describe the work your group does in your own words, as this will help us in assessing your application.

### **Please describe who benefits from the work of your organisation (e.g. members or service users) and on average how many people you work with per week, month or year?**

Describe in this section the people that the work of your organisation brings you into contact with, and roughly how many people benefit from your work or rely on the service that it provides. If you are a new organisation then please estimate the number of people that will benefit from the work of the organisation in general, as well as the number of potential beneficiaries of the project being applied for.

## **Section 3: Financial details**

Please include in your application a copy of your most recent approved annual accounts that have been **independently inspected and signed by a suitably qualified person**. We will be unable to process your application if you do not send us these or you submit accounts that are out of date and

/or unsigned. Further guidance is available on our website.

Organisations less than a year old and which therefore do not yet have approved annual accounts must provide a **projection of income and expenditure for the group's first year of operation**. This is an outline of where you anticipate receiving funding from and what you will be spending this on. Further guidance is available on our website. An independent examiners signature is not required but the projection must be signed by two management committee members. Please also include any evidence you can of funding pledged or secured, and include details of **all** your group's income and expenditure, not just that which relates to the project that is the subject of this application.

#### **What was your total income last accounting year?**

This should include all income i.e. grants, fundraising, sales etc. This figure should match the total income figure as stated in your most recent annual accounts.

#### **What are your current unrestricted reserves?**

Unrestricted reserves are funds held for the general purposes of the organisation. Restricted reserves are provided by a funder or donor for a particular purpose or project.

#### **Why can these unrestricted reserves not be used for this project?**

Please inform us if the organisation has ring-fenced any of its unrestricted reserves for a particular project i.e. purchase equipment, repair and maintenance of premises, in the event of redundancies etc.

#### **Please state the name and position of the independent examiner who has signed your accounts.**

This person should be someone with no connection to the management committee of the organisation and who is sufficiently familiar with financial record keeping of a similar level of complexity (e.g. the treasurer of another group, a bank manager or accountant or someone retired from these positions, a community support worker, etc.).

#### **Bank account name:**

Please provide the exact name in which your account is held (as it is usually shown on your cheque book). The account name should match the name on your governing document otherwise we may not be able to make a grant. Where applicable please state the reason(s) why it is different. Please note we do not require the sort code or account number at this stage. Please **do not** provide the name of the Bank/Building Society.

Please note we expect groups to require at least two unrelated people to authorise spend from their account, whether by cheque or electronic transfer. If this is not the case, we may not be able to award you a grant.

## **Section 4: Your Project**

#### **Please provide a brief description of the project you are applying for including details of what it will do and how it will be run.**

Please give a clear and concise description of the project/service/equipment you are applying for. This should include an outline of the activities or equipment that the grant will pay for, how many / how often they will be run, and where they will be located or delivered. For example (this is not an exhaustive list):

"Towards the cost of a series of six training courses that will benefit older people in the community. Courses will be run weekly between August and September in the Anytown Community Centre."

"The grant will contribute towards the salary of an administrative worker for a year, who will support volunteers to organise and run a series of events celebrating local heritage."

“Providing a range of indoor and outdoor equipment for a project that benefits disadvantaged young people. This will include two laptops and sports equipment.”

“Towards the costs of printing and publishing 500 copies of a quarterly community newsletter.”

### **In which community council area(s) will the project take place?**

Please state the community council(s) in which the project will be delivered (not the local authority area).

### **How many people will benefit directly from the project?**

Please provide a realistic estimate, or exact figure, of those that will *directly* benefit from the project to which your application relates.

### **Please tell us how you worked this out.**

If possible, please break down the figure given above, e.g. “60 will benefit in total – this was calculated based on 20 people attending the training course which will be delivered in 3 blocks over the course of the year.”

We understand that it may be hard to predict the number of people who will benefit, but please consider the following:

- We only need to know about people who will benefit during our period of funding.
- We are interested in individuals who will directly benefit from your services.
- If your project is complex and a range of people will benefit, which proves difficult to quantify, please explain why.

### **What consultation have you done to ensure this project is meeting the needs and interests of those involved?**

Please tell us how you have identified the need for your project. This should include the process you went through with potential beneficiaries/the community to establish the need for the project, for example focus groups, questionnaires, surveys, public meetings etc. It is important that you can evidence the need for the particular service or activity you are applying for.

### **What difference will your project make and how will you know this?**

What difference will the project make to the people it seeks to benefit? Please describe briefly the changes it will bring to their lives or to the ability of your organisation to make a positive impact. This is not the same as the services or activities you will provide – it is the differences these will make for those who take part. Please be realistic as to the likely difference made as a direct result of the project. Please also explain how you will know if the project is making a difference. The information you give will help us form a view on the **impact** of a grant award.

### **When is the expected start and end date of the project?**

When do you realistically expect to start and complete the project? Please be aware of the turnaround times for receiving a decision on your application. Please note we do not fund retrospectively, so please ensure you submit your application well in advance of your project start date.

## **Section 5: Details of grant requested**

### **What is the total cost of the project?**

Please provide the total cost of all the expenditure required to successfully deliver your proposed project. Please note the total cost of your project may be different to the value of the grant request.

### **How much are you requesting?**

This is the amount of money you are requesting from the Fund and may not necessarily be the total cost of your project.

### How much have you raised so far?

Of the total project cost, how much have you raised so far from other sources? This should include all fundraising and grants received to date in relation to the project you are applying for only.

In the table provided please input the details of other funding applications you have submitted/secured in relation to the project you are applying for, whether successful or not. Please do not include applications which are not directly relevant to the project you are applying to this Fund for. Where available, please indicate when you will know the outcome of any outstanding applications.

### Will you be contributing any of your own funds to the project or fundraising locally to help meet the costs? If so, please state how much and how these funds have been raised.

Please outline any fundraising activities you have undertaken or are planning; provide details on how much you have raised/expect to raise and when the event took place/is proposed to take place. Please also state if you are allocating any of your own funds to the project from reserves and how much.

### Please provide a full cost breakdown of the amount you are applying for:

Please provide a breakdown of the costs you are applying for to inform us how the proposed grant will be spent. Ensure the breakdown adds up to the amount you have requested. Please provide an accurate breakdown of the costs for each of the items for which you are requesting grant funding in as much detail as possible, showing how you have worked costs out where appropriate. For example: "Tutor costs 10 hrs/week @ £10/hr = £100/week".

## Section 6: Details of referee

Your choice of referee should be someone who is contactable during the day and who knows about your project and its activities. E.g. someone in the Local Authority, your Local Council of Voluntary Service, or a previous/other funder. **The referee must be independent and must not be a member of your organisation but should be familiar with its work.** Please ensure the referee knows about this application and is willing to be contacted by an assessor during working hours Monday-Friday.

## Section 7: Any other information

This section allows you to provide additional information you think may be relevant to support your application.

### Sending us the application: Checklist

Don't forget to sign and date the application form

A copy of your up-to-date signed constitution / governing document AND a copy of your latest independently inspected annual accounts (signed by the examiner) must be included with your application. New organisations must provide a projection of income and expenditure.

For any capital items (e.g. equipment, construction services) costing between £200 and £2000 you will need to provide a quotation from a supplier. For items exceeding £2000 in value, three quotes should be provided. If this is not possible, we will ask you to explain why.

Please check you pay the correct postage for the size and weight of your application. We do not take any responsibility for the return or non-delivery of applications sent with insufficient postage.

## What happens next:

In the first instance, we will check your application is in order and has been submitted with the necessary information. We will contact you immediately if there is anything missing or if you are ineligible to apply.

An assessor will then contact you to arrange a short telephone conversation to learn more about your project and request for funding. If you will be unavailable for any significant period between the submission deadline and notification date, please include a note to that effect in a covering letter, as your application may not be considered if our assessor cannot contact you.

You will then be informed of an outcome in writing by email or letter. **Please do not contact us to find out whether your application has been successful or not as we wish to use this valuable time to process applications.**

Please send completed applications to:

**Programme Administrator  
Foundation Scotland  
The Kiosk  
Gatehouse of Fleet  
DG7 2HP**

or via email to:

[office@foundationscotland.org.uk](mailto:office@foundationscotland.org.uk)

For any questions please contact the Programme Administrator on 01557 814 927 or via the email above.

