



## **Guidance Notes**

*These guidance notes should be read before starting an application, then referred to throughout the application process. Please note that many of the free text entry boxes used throughout the online application form have a limit of 250 words per box; so please consider this constraint when structuring your answers.*

*All questions from the Main Grant scheme application form are set out below. The Fast Track scheme application form comprises a selection of the Main Grant scheme questions. Questions typed in **bold** have guidance notes next to them in italics.*

### **Preliminary Eligibility Criteria**

**This application is being made by (or on behalf of) an organisation:** *The Bransford Trust does not accept applications for funding from individuals. Confirmation is required from all applicants that they are making an application on behalf of an organisation undertaking charitable activities.*

**This application relates to one of the following categories - Culture, Education, Healthcare, Community or Sport:** *The Bransford Trust supports activities and initiatives that deliver benefit to Worcester's local community in the qualifying categories identified and explained under What We Fund. Having read the explanation of the five categories, applicants should select the one that their activity base or initiative clearly fits within.*

**This application is for an initiative taking place at – enter Postcode:** *Your activity or initiative must take place at an address that is within 15 miles of Worcester city centre. The Trust's website will determine if the Postcode of your activity location is within the defined area and it will not accept applications from organisations or activity bases with addresses outside this area. The Trust seeks to focus its support on local organisations who undertake activities and initiatives in and around Worcester.*

**Please enter a brief title for your initiative:** *Please enter a title that clearly and succinctly describes your initiative. Your title description will feature prominently in correspondence and is used throughout the Trust's administrative systems.*

### **Introduction**

Information is provided on the Trust's website to help you with your application. Selected questions also have a '?' button next to them which links through to the relevant guidance note to assist you further during the application process. Even if you have previously made an

application to the Trust you should familiarise yourself with all information provided. In addition, you must confirm that you accept the Terms and Conditions relating to an application to the Bransford Trust for grant funding.

**1.1 Please confirm that you have read the Bransford Trust's guidelines and notes on grant applications:** *Please take the time to read the content of the Trust's website, including the guidance notes and Frequently Asked Questions. The information has been provided to help applicants understand the requirements of the grant application process and maximise the potential of eligible applicants to complete and submit an application of the quality required for consideration by the Trust.*

1.2. Have you received a grant from the Bransford Trust within the past 2 years?

**1.3 Have you previously made an application to the Bransford Trust for grant funding that has been rejected?** *Applications may be unsuccessful for a number of reasons, as explained in the FAQ's, some of which are no reflection on the initiative or the quality of the application. Prior to completion of a new application though, please take the time to re-read the content of the Trust's website, including the guidance notes and Frequently Asked Questions, to refresh your understanding of the Trust's requirements.*

1.4. Do you agree to the Bransford Trust's Terms and Conditions?

#### **Details of your Organisation**

Please enter the name of your organisation carefully as any funding award will only be made payable to the organisation named in this part of the application. In this section, the Trust seeks to understand the status of your organisation, how long it has been established, its core activities and capabilities. The Trust is keen to support organisations that operate with a significant quantity of volunteer support relative to directly employed staff.

2.1. Name of the organisation that will be the recipient of any grant awarded

2.2. Full contact details of the organisation

2.6. Are you a registered charity or is your initiative associated with a registered charity?

2.7. Registered charity number (if applicable)

2.8. Company number (if applicable)

2.9. Date established

2.10. Are you part of a larger organisation, if so which?

2.11. Provide a short summary of your organisation's main activities

2.12. Describe your organisational structure and its management's experience base

2.13. Please indicate the number of Full Time Equivalent staff in your organisation

2.14. Please indicate the number of regular volunteers that work with your organisation

## **Details of your Funding Request**

In this section you should clearly describe why you are applying to the Bransford Trust for funding. The Trust is keen to understand your efforts to secure funding from other sources, noting that it usually provides partial or matched funding of initiatives while operating within its funding limits and constraints. A view of the total cost of your initiative allows the Trust to better assess its viability; considering the relative contribution of the funds applied for alongside those in place, obtained elsewhere or still sought from other sources. The Trust is keen to support organisations that seek to utilise funding applied for to deliver new activities, services or initiatives via their organisation, rather than simply to support existing operating costs.

**3.1. Please provide summary details of why you are applying for funding from the Bransford Trust to support your organisation's initiative:** *Please explain why you have chosen to apply to the Bransford Trust in particular for funding of your initiative.*

**3.2. Are the funds requested, in part or whole, to support the running costs of your organisation?** *While the Bransford Trust may on occasion provide financial support for the running costs of organisations, it is motivated to provide funding for new initiatives that expand the provision of an organisation's activities.*

**3.3. What is the total cost of your initiative?** *This information allows the Trust to assess the level of support it is being asked for relative to the total cost of the initiative - and thereby assess the applicant's other efforts to secure funding from other sources or meet costs by other means.*

**3.4. How is the figure for the overall level of funding arrived at and broken down?** *Brief summary information is required to provide basic confirmation that the costs of the activity or initiative have been fully considered.*

**3.5. How would funding expenditure be split between the initiative and organisational running costs if applicable?** *This estimate is needed to quantify the statement made in answer to 3.2*

**3.6. What funding has been raised from other sources to date in support of the initiative – indicating amount raised by source?** *The Trust is keen to determine the level of funding that has been successfully obtained from other organisations, to allow it to establish the applicant's wider commitment to securing funding for its activities and initiatives.*

**3.7. What funding applications from other sources are pending - indicating amount requested pending by source?** *The Trust seeks to understand if the delivery of the initiative is dependent on the successful outcome of other funding applications, and may require confirmation from the applicant that it has secured all necessary sources of funding before it releases any grant awarded.*

**3.8. Have you established whether or not your initiative is eligible for support from any statutory bodies?** *Confirmation is required from applicants that they have investigated if funding is available for their activity or initiative from statutory bodies.*

**3.9. What amount of funding is sought from the Bransford Trust under this application towards the total cost of your initiative (entered in 3.3)?** *This is the amount of grant funding requested just from the Bransford Trust under the application, to help with meeting the total cost of the applicant's activity or initiative. Please see the FAQ's for further guidance on the amount of funding to apply for.*

**3.10. Aside from the funds you are applying for from the Bransford Trust, is the balance of funding in place to meet the total cost of your initiative?** *In conjunction with 3.7, this question seeks to determine whether sufficient funding is in place - should the grant applied for be awarded by the Bransford Trust – to ensure delivery of the activities or initiative described in the application.*

3.11. How will expenditure on the initiative be phased? – indicating amount by period

**3.12. When is the latest date the funds applied for are required?** *This important date indicates to the Trust when funding is needed. It will be used in conjunction with the start and end dates of the initiative as well as the phasing of expenditure, to determine the timing of payment of any award made, as well as whether it is appropriate to make payment in stages in line with a payment schedule decided upon by the Trust.*

3.13. When will your initiative commence?

3.14. When will your initiative end? (Leave empty if no fixed end date)

### **Explanation of your Initiative**

This section of the application provides the opportunity for applicants to explain their planned activities or initiative in detail, describing who will benefit and how. The Trust is keen for the initiatives it supports to bring benefit to many and has a particular focus on the support of young people. The Trust is also keen to support initiatives that expand the applicant organisations activity base or services, creating new experiences and opportunities for people in the local area.

**4.1. Please provide full details of the initiative for which you are applying for funding from the Bransford Trust.** *This summary explanation of activities for which you require support will feature prominently in the presentation of your application throughout the Trust's administrative systems. Please ensure the information provided clearly and concisely describes your initiative.*

4.2. What are the aims and objectives of the initiative - described with reference to the creation of improved opportunity and circumstances for beneficiaries, as well as experiences and skills accessed or gained?

4.3. Please describe who your initiative will help, how many people will directly benefit, in which age groups and over what period?

4.4. If the funding applied for will be used to address organisational issues, please provide summary details of the changes planned.

4.5. How will your organisation's offer or services be improved by the funding applied for?

### **Supporting Information**

The Trust requires some basic financial information to help it put the applicant organisation's grant application and initiative in context. Applicants should submit financial accounts for their organisation if they are available, but in all cases provide the more basic summary financial information requested regarding their overall financial position.

5.1. Please enter the financial period of your organisation's latest accounts.

5.2. Upload latest accounts (.pdf or .xlsx) if available.

5.3. Please enter the following financial information from your organisation's latest accounts or summary financial information:

5.3.1. Total incoming Resources/Receipts in the period

5.3.2. Total resources Expended/Payments in the period

5.3.3. Total Free Reserves/Unrestricted Funds

### **Additional Information**

Please use this section of the application form to provide any additional information - that you don't believe has been captured elsewhere - in support of your application to the Trust. In addition to a further summary statement, the Trust is happy to review additional documentation - though please ensure that any information provided is brief, clear and fully relevant to your application.

6.1. If you would like to add any further relevant information in support of your application then please do so below:

6.2. If you would like to supply any additional documentation please attach up to three files for consideration alongside your application. These may be .jpeg .png, .pdf or .docx files.

### **Commitment to Provide Feedback**

The Trust requires your commitment to feedback the outcome of your initiative so that it can establish that the financial support it provides is being appropriately used to deliver benefit to the local community. The feedback you provide on your achievements will also be used by the Trust to raise awareness of charitable initiatives, encourage further participation and support for similar activities as well as to inspire and inform other potential applicants. The Trust also requires a commitment that any funding provided will be used for the purposes stated in the application.

7.1. Please confirm that you agree to provide the Bransford Trust with a brief report on the outcome of your organisation's initiative within 6 months of its completion.

7.2. Any grant awarded is done so on the basis of the information provided. Please confirm that you agree to inform the Bransford Trust immediately of any change in the circumstances of your organisation that may vary the delivery or scope of your initiative from that advised in this application.

### **Organisational Contacts**

Please provide full details of the contacts in your organisation that the Trust may correspond with regarding your application. A secondary contact may allow queries to be progressed in the absence of the primary contact, helping to avoid missing the deadline for consideration of applications in case of an outstanding query. In the first instance though, all correspondence will be addressed to the primary contact, who should be easily contactable. All contacts detailed should be knowledgeable regarding the application.

8.1. Please enter details of the primary contact for this application

8.2. Please enter details of any secondary contact

### **References**

The Trust requires the contact details of a referee who it may contact to gain further background on the work of your organisation and its initiative. The referee should therefore be familiar with the work of the organisation and willing to provide a personal view of its benefit the local community.

9.1. Please provide details of a professional referee with knowledge of your initiative and application that the Bransford Trust may contact to discuss it with.

© The Bransford Trust 2016