



Foundation Grants Guidance Notes

These guidance notes will help you complete your application for a Foundation Grant. If you find anything unclear or confusing or would like to talk to us, please call the grants team on 01380 729284 or email on info@wiltshirecf.org.uk

Please start by reading through the criteria (see below) for the Foundation Grants to make sure that your application fits and so you can understand what we are looking for in your application.

Criteria of Foundation Grants

Foundation Grants fund projects which will make a sustained impact on the lives of disadvantaged people in Wiltshire and Swindon. All projects must demonstrate that the majority of people benefiting are disadvantaged in one or more of the following ways:

- economically - facing financial difficulties
- socially - unable to participate in normal activities without support
- geographically - living in an isolated or disadvantaged community with limited access to services
- physically - having additional needs, a disability or mental health issues

The Foundation particularly focusses its grants on projects taking place in communities with limited financial capacity and benefitting people who cannot afford to cover the costs themselves.

You can apply for up to £5,000 per year for 1, 2 or 3 years. The maximum grant is £15,000.

Groups of any size can apply for a Foundation Grant, but if you are applying to, or currently hold, a Small Grant you cannot apply for a Foundation Grant as well.

What we fund

- registered or non-registered charities and community groups operating within Swindon and/or Wiltshire who have the following:
 - a bank account with at least two unrelated signatories
 - an independent management group based in Swindon or Wiltshire
 - a constitution
 - less than 12 months running costs in unrestricted reserves
 - an Equal Opportunities Statement
 - if relevant, a Child Protection Policy (under 18 years) or Vulnerable People Policy (over 18 years) and procedures
- social enterprises (including Community Interest Companies) provided they:
 - have a social purpose and are owned and run by their communities
 - are limited by guarantee
 - have at least three unrelated directors, the majority of whom are not paid
 - have an asset lock clause that ensures funds and assets are transferred to a body with charitable objects on closure of the CIC
 - have a system to ensure decisions on Directors' remuneration are not taken by those Directors receiving remuneration
- new projects
- continuation of existing provision

- training and other development activities that strengthen groups
- salaries
- core costs and overheads
You are welcome to apply for core costs, but you should apply for an identifiable element (e.g. 4 hours per week administrator time) or as part of full cost recovery for a project (ie when applying for project costs you can include a proportionate contribution to the organisation's core costs.
- up to £5000 towards capital projects (buildings and equipment), provided most of any remaining costs have already been secured

What we don't fund

- groups with more than 12 months running costs in unrestricted reserves
- groups without an independent management group based in Swindon or Wiltshire
- statutory organisations including schools, academies, area boards, town and parish councils and NHS Trusts.
- projects taking place outside Swindon or Wiltshire
- projects due to start more than 6 months after the grant is awarded
- one-off or sponsored events
- general large fund raising appeals
- capital projects costing more than £5000 unless most of the cost is already secured
- projects which duplicate an existing service
- the advancement of religion
- medical research and equipment
- animal welfare
- party political activities
- running costs for Community Area Partnerships

How to apply

We have sent you a link to our on-line application form process. The link will take you to a screen where you register your email address to receive the form. A link to the form will then be sent to your email address and you can start to complete it. You can save the form at any time as you complete it. If you want others in your organisation to contribute, you can share the link to the form with them.

Most answers have a word limit because we do not want you to give us excessive detail. Once you have submitted your application, one of our grants assessors will contact you to arrange to discuss the application either by phone or a visit. At this point you can tell us anything you have not been able to do on the form.

Many questions have a small blue information dot. These tell you what we are looking for in the answer.

In the email sent with these notes, we have told you when you need to submit your form. If you have difficulty meeting this date, please contact us. Sometimes we can be a bit flexible.

Guidance on completing the form

Section 1 – Organisation

This section helps us understand your organisation, including its financial position and who is responsible.

Section 2 – Project & Referee

This is your opportunity to make a case for the grant, explaining clearly why you want a grant and how you will spend it.

Please answer each question as specifically as possible. We want to know exactly how you will spend the grant and the difference it would make.

Please try to avoid repeating information in various answers. Each question is different, so if you are repeating yourself it probably means that you have not provided the information we were looking for in one question.

The following are some examples answers to give you an idea of what we are looking for:

Example project description:

We will run a weekly youth club for young people aged 8 to 16 in our village during term time. We will hire the village hall for 2 hours each week, recruit 2 paid youth workers and 4 volunteers to staff the club. We will organise a variety of activities and trips. The grant requested will cover the costs of the youth workers.

Make sure that you also include in the Budget section all the items you include in this description.

Example description of why the project is needed:

There are 120 young people in our village aged between 8 and 16. There are currently no facilities for young people in this isolated village. In March we held a consultation meeting attended by 20 families. 26 of the 30 young people who came said that they currently had nothing to do in the evenings and would like a weekly youth club.

A common error is to tell us in this answer about the difference the grant will make. Just describe the needs of the people who will benefit.

Example description of how the beneficiaries disadvantaged:

There is no affordable transport out of the village for young people. The nearest town is 8 miles away and the bus runs only twice per day and not at all after 5pm. There are a number of areas of social housing in the village and many families are on low incomes.

Example description of the difference you expect the project to make:

Young people in our village will be able to socialise with each other and take part in enjoyable and positive activities. They will feel more positive about their own community. They will be able to tell us what activities they want, and help to develop these in the group.

Example description of how you will know the project is making a difference:

We will keep a record of how many young people attend and what activities they participate in. We will ask them to give us feedback about the youth club informally and formally, through conversation, surveys and social media. We hope to involve the young people in the design and collection of feedback.

Referee

The referee should be someone who knows your organisation well but is independent of it. We may want to discuss your application with them, so please make sure they know about the application.

Section 3 – Budget Breakdown and Impact

We want to know how much your project will cost in total and how you have calculated this. We also want to know how you plan to meet the total cost. We are particularly interested in knowing whether the people who will benefit will contribute towards the costs.

Please make sure that the amounts are consistent and the totals are correct. During assessment, we often have to spend time re-calculating budgets which have been submitted incorrectly.

For each item (“Staff Costs”, etc), tell us the total cost for Year 1 of the project and how much of this you are requesting in the grant. In the Breakdown boxes, itemise what you have included in the total.

Volunteer costs can include the costs of recruiting volunteers and reimbursing their expenses (eg travel or lunch). You should not budget to pay volunteers a flat daily rate.

If you are unsure how to work out or write down the expected costs, then contact us for some advice

Section 4 – Impact & Equal Opportunities

Please estimate as accurately as you can how many people will benefit from the project. We know that it can be difficult to estimate this, but it will help us understand your project.

From the various lists, please select the most relevant descriptions of what you expect to achieve and who will benefit. These will not influence the success or otherwise of your application. They help us evaluate the overall effectiveness of our grants programmes.

Supporting Documents

Please submit all the supporting documents. You can email or post them separately but it is easier for us if you attach them to the form. If you have applied to us recently, we will have copies, so you do not need to submit them again. If you are unsure if we need new copies, please contact our grants administrator on 01380 729284 or email info@wiltshirecf.org.uk

Submitting your application

If you have made any errors or missed out a required question, you will receive error messages when you try to submit the form. If you have difficulty resolving these, please contact our grants administrator on 01380 729284 or email info@wiltshirecf.org.uk. We can access your form and can help resolve any issues.

When your completed application has been successfully submitted, you will receive a completion email.

What happens after I have submitted my application?

Initial assessment

When we have received your application, we will check it is complete and eligible. If you have not submitted all the supporting documents, we will ask you to do so – this will delay your application and may mean that the Grants Panel cannot consider it until a later grants round. If your application does not fit the criteria of the grants programme, we will tell you why and what you would need to do before re-applying.

Assessment

One of our grants assessors will then assess your application. The purpose of this assessment is to make sure that the Grants Panel, who will make the decision, fully understands the application. For groups who are new to fundraising or are not familiar with completing this type of application, the assessment process is also a further opportunity to explain to us why you want a grant.

- The assessor will call or visit you and discuss the application.
- The assessor may then contact the external referee to clarify anything they need to.
- The assessor will write an assessment report which gives the Panel additional information and analysis.

Decision making

Our Grants Panels decide whether a grant should be awarded. The Panels are made up of a wide variety of people from across Wiltshire and Swindon. Panel meetings are usually held quarterly. Panel members read your application form, accounts and assessment report before reaching their decision together.

In reaching a decision, the Panel consider the following:

Is the project needed?

- What are the needs of the people who will benefit?
- How severe are these needs and how many people are experiencing this need?
- Do the beneficiaries want this project?
- Are other services already meeting their needs?

Will the funded project meet these needs?

- Will the project make a significant difference to people in need?
- Do the group understand clearly what difference they are trying to make?
- Is it likely to be achieved?
- Is the budget well planned and realistic?

Is the group is well run?

- Does the group have the skills and experience to run this project well?
- Does it have suitably qualified and engaged trustees, staff and/or volunteers?
- Are appropriate safeguarding measures in place?
- Does the group manage its finances well and have sound financial plans for the future?
- What is the group's history with the Foundation?

Does the group need the grant?

- Are the group and the beneficiaries contributing as much as they can to meeting the project costs?
- Is the group able to raise funds within their own community?
- Has the group explored other sources of funding?

After the Decision

Very quickly after the Panel meeting, we will send you an email or letter telling you the Panel's decision.

- If you have been awarded a grant, the email or letter will include a copy of our Terms and Conditions for you to sign and return to us.
- When we have received a signed copy of our Terms and Conditions, we will pay the first year of grant.
- If your group is not funded, the letter or email will tell you why. If you wish to consider re-applying, you can contact us to discuss what you would need to do to make an application more likely to be successful.

During the Grant

If, at any point, you have any difficulty in delivering the project how and when you described in the application, please contact us. We are usually happy to be flexible, but do need to know about any changes. Our Terms and Conditions make this clear.

End of the Grant

At the end of your grant, we will send you an online form for you to tell us how you spent the grant and what you achieved. We intend this process not to be onerous for you. We hope that you will find the process of reflecting on your project helpful in your own future planning. Please ensure

that you do complete the end of grant form when you receive it. We are unlikely to award you any further grants if you have not told us what you have achieved with this one.

If we have awarded you a multi-year grant, we will contact you, probably by phone, at the end of each year to discuss how the project is going before we pay the grant for the following year.

Complaints procedure

If you want to challenge the Panel's decision you can do so, but only if your complaint is about the fairness of the process. Details of the complaints procedure are available from the Wiltshire Community Foundation.