Trusthouse
Charitable Foundation

MAJOR GRANTS STAGE 1 APPLICATION
HELP INFORMATION TO THE QUESTIONS ON THE FORM

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	A. ORGANISATION	
A1	**Name of Organisation**	If you are a registered charity or company, we will confirm your details against official registers. Please explain if you are using a different name to the registered name.
A2	**Your organisation address**	We will use the postcode you give in this section to see if you are within our target categories for the Index of Multiple Deprivation. If you will be delivering services from a different place or the majority of your clients live somewhere else, explain this in your answer to Question D2: 'Please tell us about the community or local areas where your organisation works´ and provide either the postcode of the venue where work will be delivered or up to six representative postcodes of public buildings such as GP surgeries, schools, libraries, where the majority of your clients live. **You must not provide the postcodes of your clients' homes.**
A3	**Please select what type of organisation you are**	If you are a Community Interest Company, you are **not** eligible to apply. If you are an unregistered voluntary organisation, we may ask to see your constitution at a later stage of our assessment process. **Please note that Adventure Playgrounds, Baby Banks and Disability charities cannot apply to our Major Grants programme.**
A4	**Registered charity**	If you are a registered charity enter your registration number here. **If your record on the Charity Commission / Scottish Charity Regulator / Charity Commission for Northern Ireland register shows that you have been late making your Annual Return or sending in your Annual Accounts within the past three years, then we regret your application will be ineligible.**
A5	**Registered company number**	If you are a registered company or industrial and provident society, enter your registration number here.

		If your record on the Companies House list shows that you have been late making your Annual Return or sending in your Annual Accounts within the past three years, then we regret your application will be ineligible.
A6	**Year Established**	This is the year you were set up, not the year the organisation became a registered charity or company etc. **Use the calendar to select a date by day, month and year. INPUTTING THE DATE MANUALLY WILL CAUSE AN ERROR.** Please note that the calendar goes back to 1970. If your organisation is older than this, select the nearest date and let us know the actual date you were set up at grants@trusthousecharitablefoundation.org.uk *Note: set up for less than a year? If you do not have at least one year's annual accounts you are not eligible to apply.*
A7	**Organisation email address**	
A8	**Organisation website**	

B. PRIMARY CONTACT

B1	**Title**	
B2	**First name**	Please ensure that the contact details you give are for the person best placed to answer any queries on the application and who will be available after the application has been submitted. **If applying for a salary, the application should not be made by the postholder.** The application can be made by a trustee or senior manager who will act as a contact point but may need to ask your organisation's office to help with any additional information we might require.
B3	**Last name**	
B4	**What is your Job Title in the organisation?**	**If applying for a salary, the application should not be made by the postholder.** The application can be made by a trustee or senior manager who will act as a contact point but may need to ask your organisation's office to help with any additional information we might require.

B5	Telephone number	
B6	Mobile number	
B7	Email address	
B8	Primary contact street address	We may ask you to confirm why the correspondence address needs to be different. Examples of valid reasons are: the organisation's building is not always staffed (as in the case of a community hall) you are acting as a volunteer or paid fundraiser and are responsible for all correspondence relating to this funding application.
B9	Primary contact postcode	

	C. ELIGIBILITY OF ORGANISATION	
C1	What was the total annual income in your organisation in the last financial accounting period?	1. This is the Total Income as given on your latest annual financial accounts. 2. We do not give grants to organisations with a Total Income over £500,000. 3. Please note that if your anticipated total income or expenditure over the forthcoming year is significantly over £500,000, we are not likely to make a grant as Trusthouse's ethos is to support small to medium-sized charitable organisations. 4. Individual project incomes should not be given - it is the organisation's whole annual income we want to see. 5. Give your answer in pounds only, do not include pence.
C2	What were the unrestricted reserves of your organisation in the last financial accounting period?	This is your organisation's Unrestricted, Free or General Reserves as given on your most recent annual accounts. A charity's reserves is the accumulation of its surpluses and deficits over its life. There are two broad categories of charity reserves: restricted and unrestricted reserves.
C3	What is the Index of Multiple Deprivation (IMD) score of the local area where your organisation is based or will carry out its work?	Each country of the UK has a separate Index of Multiple Deprivation (IMD), which ranks deprivation by postcode. You must check the IMD website to find out if your organisation's postcode, or the areas where it works, is in the most deprived 15% for urban areas and 50% for rural areas. Further detail on how to find your IMD Score, with weblinks, is on the Trusthouse website under "Our Grants --> FAQs".

https://www.trusthousecharitablefoundation.org.uk/our-grants/frequently-asked-questions

If the postcode of your organisation's office is not within the most deprived 15% of the Index of Multiple Deprivation for urban areas or 50% for rural areas, but the areas where you work are, you can include in your answer to this question a representative postcode for the areas where your activities are carried out.

If necessary, you may also include multiple postcodes in Question D2 to describe the community. Postcodes can be for schools, GP surgeries, post offices or other public buildings but must not be of private dwellings.

C4	**Tick to confirm you have a safeguarding policy which is given to all trustees, staff, volunteers and clients**	If you do not have a policy, we are unlikely to make a grant to you. We do not require you at this stage to provide a copy of the policy though we may ask you to send it at a later stage of your application.
C5	**When was the last training/refresher session on safeguarding conducted with staff/volunteers?**	**If you have not reviewed your safeguarding policy and/or held training or refresher sessions within the past 12 months of the date of your application, we regret that your application will be considered ineligible and will be rejected.** Your answer to this question demonstrates that you regularly review and update your policy, in line with the circumstances of your organisation, its work and the needs of your clients, staff and volunteers. Enter the date by day, month and year.

D. PROJECT DETAILS

D1	**What does your organisation do?** (450 words)	You should describe in straightforward terms what your organisation's aims are and what services or activities you provide to achieve these aims. The Major Grants programme currently focus on organisations that support vulnerable families. Please see our Funding Guidelines for the complete list of Family Support activities we support. Please avoid simply cutting and pasting your 'charitable objects' as they are written in your founding document.

D2	Please tell us about the community or local areas where your organisation works. (450 words)	**If you are supplying additional representative postcodes, put them here. These must be for public buildings and not individual residences of your service users.** Trusthouse supports organisations providing Family Support to communities in deprived rural or urban areas. It is important to describe the community where your organisation is based and/or how your organisation's activities address local challenges in deprived communities. Tell us in your own words about the people and the place where you work: • Are the residents a tight knit community or are there tensions between different groups? Are the people interested in helping each other and their community? Or is there a loss of hope and a lack of aspiration? • The look of the area: is it high rise flats or Victorian terraces; is it poorly maintained; is it scenic but isolated? Is it rural or urban? • What sort of work is available locally? Are people likely to have qualifications? • Do the local schools inspire and encourage an interest in learning? Are there social, educational and leisure activities for all ages? Advice Your own thoughts on the local community tell us much more than numbers. Avoid using statistics or excerpts from reports by statutory authorities. Some of the most powerful descriptions we've received have been the views of local people about their community. Think of asking your service users how they would describe the area.
D3	Please describe the impact of your work. (450 words)	In this section, please provide evidence that your work is successful and what impact it has a) on the families and individuals who directly participate in your services/activities and b) the local community. 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." This section also shows us that you keep track of whether or not you are succeeding in your aims. The measurable outcomes you provide in your answer should relate to the past year.
D4	Please provide a case study of a family or individual you have	A case study of a family or individual you have recently helped can be very helpful in demonstrating the impact your work has and can add a real sense of the people who you help.

	recently helped. (450 words)	We appreciate that not all organisations can share case histories and it is therefore not a requirement to give this. If you are able to do so, please change any names or give the case anonymously. For data protection purposes, please note your application including the case history, will be held on a secure server. It will be shared with Trusthouse trustees and staff and possibly with other trusts and foundations who ask us for our opinion on your work. It is not given to anyone else.
D5	**How many individuals have used your services in the past 12 months?**	Number only. No commas or decimals. Please tell us how many individuals participated in the activities/services in the past 12 months. You cannot enter a range, only a single number. If you do not have a precise number of clients, we suggest you enter an average. So, if you know the number of users was between, say, 450-500, then enter 475.
D6	**How many individuals will benefit from this work or service over the next 12 months?**	This is the number of people who will actually take part in the project, not people who benefit indirectly such as family members or audience numbers.
D7	**Please describe the work, salary or project the grant will pay for?** (450 words)	We need to know exactly what you are applying for a grant to fund and what our funding would be spent on. Please describe this in written text format - a project budget with financial costs should be uploaded in the "Supporting Documents" section. Your project should relate to providing Family Support services, such as: • Early intervention • Families coping with addiction • Prisoners' families If you are seeking running costs and especially salary costs, we would need to know the importance of these roles in delivering your services. *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 family support group 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': you need to describe fully what costs particularly you are seeking.

D8	**If this is a new project, service or employee role, how and why have you decided it is needed? (If this is not a new project, go to the next question.)** (450 words)	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. You do **not** need to answer this question if you are requesting funding for an existing project or post.
D9	**What is the total cost of this work, salary or project?**	The total cost is for the full amount of the work for which you are applying for a grant. For example, if you are applying for a salary, then the total cost is for the whole of that salary and must not include other salaries or running costs. On the other hand, if you are applying for a general grant towards all running and salary costs, then the total cost would be for all the costs involved (but please remember, you cannot then ask for a grant to be towards a specific part of these costs, nor can a grant be used to pay for more than 50% of any of the single items that make up this whole amount). Enter the total cost for all the years for which you are applying (max 3 years). For example, if you are seeking funding towards a salary of £25,000 a year, then the amount you would enter is £75,000. The total cost should be the **cash** cost of the project, and <u>not</u> include volunteer time or goods in kind. Enter the amount in pounds; do not include pence. Do not include £ sign or commas.

D10	**What is the total grant amount you are requesting?** **(The amount cannot be for more than 50% of the above total cost of work)**	The minimum grant you can request is £10,000. You can apply for either: *Single year grants:* From £10,000 to a max of £50,000 for one year for core costs, salaries, running and project costs. *Multi-year grants:* From £10,000 up to a maximum of £100,000 over 3-years for core costs, salaries, running or project costs. No more than £50k can be applied for in any given year over a 3-year period. **Applications for amounts outside these figures will be rejected.** **You cannot apply for a grant larger than 50% of the total cost of the project/work.** Examples: - if your total running costs per annum are £40,000, and you want a single year grant towards these costs, you may only request a grant of up to £20,000 - if you are applying for a three-year grant towards a salary which is £20,000 a year, the maximum grant you could request is £30,000 i.e. £10,000 per year • If we make a grant to you, it may not be for the full amount you request: it depends on the funds we have available and our Trustees evaluation of your work. • Enter an amount in pounds only, not pence. • Do not include £ sign or commas.
Multi-year grant applications only: only answer these questions if you are asking for a grant for more than 1 year's costs.		
D11	**Grant amount requested for year 1**	• You should only answer this question if you are asking for a grant for more than 1 year's costs. • Your answer to **Question D14 (Total Amount Requested)** must equal the sum of this and the following two questions on the grant amount require for Yrs 2 and 3. • The budget you provide must also mirror the amounts given in your answer to these questions. • Your answer should be in whole £ only.

D12	**Grant amount requested for year 2**	• You should only answer this question if you are asking for a grant for more than 1 year's costs.
		• Your answer to **Question D14 (Total Amount Requested)** must equal the sum of this and the questions on the grant amount required for Yrs 1 and 3.
		• The budget you provide must also mirror the amounts given in your answer to these questions.
		• Your answer should be in whole £ only.
D13	**Grant amount requested for Year 3**	• You should only answer this question if you are asking for a grant for more than 1 year's costs.
		• Your answer to **Question D14 (Total Amount Requested)** must equal the sum of this and the previous two questions on the grant amount required for Yrs 1 and 2.
		• The budget you provide must also mirror the amounts given in your answer to these questions.
		• Your answer should be in whole £ only.
D14	**Total amount requested**	Your answer should equal the sum the previous questions on the grant amount required.
		You can ask for a maximum of 50% of the total cost of the work, running costs **or any one salary**.
		You cannot apply for a grant larger than your funding shortfall.
		If we make a grant to you, it may not be for the full amount you request: it depends on the funds we have available and the interest of our Trustees in your work.
D15	**What funds have you secured to date?**	• Funding must be actually secured or be pledged to you for the current calendar year.
		• You cannot include anticipated amounts from sales income or grants which you 'usually' receive but which are not yet actually confirmed.
		• Do not include funds raised for pilot projects which have completed.
		• Enter the amount in pounds only, not pence.
		• Do not enter £ sign or include commas.
Multi-year grant applications only: only answer these questions if you are asking for a grant for more than 1 year's costs.		
D16	**Funds secured to date for year 1**	Funding must be actually secured or be pledged to you for the current calendar year.

		You cannot include anticipated amounts from sales income or grants which you 'usually' receive but which are not yet actually confirmed.
D17	**Funds secured to date for year 2**	As above
D18	**Funds secured to date for year 3**	As above
D19	**Total Amount Secured**	Your answer must equal the sum of the previous three questions.
D20	**Who else is currently funding this work?** (450 words)	**Please list the confirmed funders of this work.** • 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 and are not over-reliant on one source. • For grant applications for running and salary costs, ideally we like to see that you have some multi-year funding in place to give an element of stability to your work. • Do not include details of unsuccessful applications.
D21	**What other applications are you making for the cost of this work?** (450 words)	Please tell us what other applications you have in hand or are planning to make for the costs for which you are applying to Trusthouse. **Trusthouse will cover up to a maximum of 50% of the total operating, salary or project cost** **Please include applications which you are making which involve the salary/work/costs for which you are applying to Trusthouse but may also be for other items as well.** For example, if you are applying to Trusthouse for a salary, you may be applying for a general or unrestricted grant from a funder, and if you are successful, you will use some of that grant for part of the amount of the salary. Do not include applications you are planning to make for other costs, unrelated to this request. For example, if you are applying to Trusthouse for running costs, do not include applications you plan to make for a specific salary.
**E. SUPPORTING DOCUMENTS** Maximum file size 10 MB each (ten megabytes) with a total of 25 MB (twenty five megabytes) across all uploads on this form	
E1	**Please upload your latest annual accounts here**	• Send your latest annual financial 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 organisation has been running for less than a year, and you cannot yet provide annual accounts, we regret

		that you are not currently eligible for funding.
		• If your accounts show that you have significant unrestricted reserves (more than 12 months of operating costs), please 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, we will ask you 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.
E2	**Please upload a budget for the costs of the work or project for which you are applying.**	• 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 a multi-year grant you must provide a budget which shows the expenditure for each of the years for which you want a grant. • If you are applying for running costs, provide a budget for all your running costs. • If you are applying for a salary, you should show the basic salary; NI; pension contributions; any expenses (e.g. travel) expected. • Do not send cashflow projections: these are not the same as a budget for specific work or a project.
E3	**If your latest annual financial accounts are more than 6 months old, please upload your latest management accounts**	If your annual financial accounts are more than 6 months out of date, we request that you upload the latest management accounts. This will allow us to form a more complete picture of your current financial situation. If there have been significant recent changes in your organisation's financial situation, for example in the level of current unrestricted reserves, we may request further explanation. **Please note that reuploading a file overwrites the currently uploaded file**

F. DECLARATION

F	**Click to confirm that all the information given on this form is correct and current.**	If a grant offer is made, you will be required to sign a copy of the offer letter re-confirming the below and your acceptance of our grant terms:
		1. You confirm you have the appropriate level of authorisation from your organisation to make this application. Trusthouse reserves the right to request additional information from your organisation by phone, email or letter to confirm your authorisation.
		2. You confirm that the information you have given in this application is true and accurate to the best of your knowledge. You understand that knowingly providing false information will invalidate this application and may result in the requirement to repay any grant that may be made.
		3. You confirm that if any grant is made by Trusthouse Charitable Foundation to your organisation, it will be used for the purposes described in this application. Failure to do so may result in the requirement to repay the grant.
		4. You confirm that we may hold and process the information you have provided on a secure server. The information will be shared with Trusthouse trustees and staff. It may also be shared with other trusts and foundations, who seek Trusthouse's opinion on your organisation, work and project for which you are seeking funding.
		Note: If a grant offer is made, you will be required to sign a copy of the offer letter re-confirming the above and your acceptance of our grant terms.