

**MAJOR GRANTS STAGE 2 APPLICATION  
HELP INFORMATION TO THE QUESTIONS ON THE FORM**

| <b>A. GOVERNANCE AND MANAGEMENT</b> |   |  |
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| <b>A1</b>                           | <p><b>Please give a brief description of the way in which your organisation is governed and managed.</b></p> <p>(330 words)</p> | <p>We want to be satisfied that you are a well-run organisation, governed in accordance with best practice standards of a charity, registered company or recognised sector standards.</p> <p>Information about your Board and how your organisation is governed will be in the Trustees Report.</p> <p>Give a brief description of the way in which your organisation is governed and managed.</p> <p>Your description should include: number of trustees; their relevant skills; trustee recruitment process; length of appointment; frequency of meetings; who is responsible for Charity Commission requirements; how the trustees work with the management team to support and guide the work of the organisation as a whole and the work of employees; financial controls i.e. checks and balances in place on expenditure, cheque signatories, internal bookkeeping.</p> <p>If you are a registered charity or company and your record on the relevant authority's website shows you have been late submitting annual returns/accounts within the past three years, you can use your answer to this question to explain why this happened.</p> |
| <b>A2</b>                           | <p><b>How are people made aware of your services?</b></p> <p>(160 words)</p>  | <p>We are interested in your plan to ensure individuals and families know the service is available.</p> <p>For example, you may be advertising in local papers, radio, on noticeboards in your own venue or local community centres, receiving referrals from other voluntary or statutory services, by leaflets distributed through GPs' surgeries, other agencies etc. You might encourage people to attend a support 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.</p>  |
| <b>A3</b>                           | <p><b>How will you encourage people to participate?</b></p> <p>(330 words)</p>  | <p>Making people <i>aware</i> of a project is one thing: actually seeing them <i>participate</i> and engage with your organisation might be quite another.</p> <p>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 acting as 'peer buddies', reception staff might be trained on how to welcome new members etc.</p>   |

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| <b>A4</b> | <b>When was the written safeguarding policy, plus the procedures and measures to implement it, last reviewed?</b>                                    | <p><b>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.</b></p> <p>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.</p> <p><b>Use the calendar to select a date by day, month and year. INPUTTING THE DATE MANUALLY WILL CAUSE AN ERROR.</b></p>  |
| <b>A5</b> | <p><b>Please describe how you handled any reportable safeguarding incidents within the past 24 months.</b></p> <p>(660 words)</p>                    | <p>'Reportable incidents' in this context means all safeguarding issues which were brought to the notice of the management/trustees of your charity and/or statutory authorities such as the police, Charity Commission, social services etc.</p> <p>You should briefly describe the incident (e.g. a client complained a volunteer had verbally abused her), the date it happened (e.g. March 2024), what action was taken (e.g. statements taken from client, volunteer and staff member present; client had been told that her behaviour was putting other clients at risk so volunteer had to tell her she could not access the activity), any additional measures implemented to stop a recurrence (volunteer re-trained, reviewed activity to see if it was appropriate for all clients).</p>   |
| <b>A6</b> | <b>When did you last review the safeguarding policy and record of third party organisations with whom your organisation has a formal connection?</b> | <p>Forte Charitable Foundation underscores the importance of safeguarding widely. We want to be sure that organisations using third party service delivery partners take every care to be confident that these organisations have strong safeguarding policies and practices in place.</p> <p>Examples of such situations are:</p> <ul style="list-style-type: none"> <li>• Organisations, community centres and family hubs hiring out space to other youth groups, disability support groups, family services, or childcare providers.</li> <li>• Commissioning a finite project or ongoing work with a third-party organisation that works with vulnerable groups e.g. a youth organisation buying in services from a performance therapy company for young people who have had traumatic experiences</li> <li>• The lead partner in a consortium project, responsible for managing a project delivered by several different organisations e.g. a local community project which will use reminiscences gathered by an older people's group to be formed into a multimedia exhibition created by young people under guidance of an external digital media company.</li> </ul> |

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|            |  | <p>Use the calendar to select a date by day, month and year. INPUTTING THE DATE MANUALLY WILL CAUSE AN ERROR.</p> <p><b>If you have not reviewed the safeguarding policy of any third-party service providers within the past 12 months of the date of your application, we regret that your application will be considered ineligible and will be rejected.</b></p>   |
| <b>A7</b>  | <b>Please confirm all your staff/volunteers are vetted through the Disclosure and Barring System (DBS)</b>                                   | <p><b>If staff/volunteers are not DBS checked, we may contact you for further details.</b></p> <p>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.</p> <p>In England, Wales and Northern Ireland these checks are carried out through the Disclosure and Barring Service (DBS).</p> <p>In Scotland, you may be using the checks provided by Disclosure Scotland, which includes the PVG (Protecting Vulnerable Groups) system, which for these purposes we will equate to DBS checks.</p> |
| <b>A8</b>  | <b>Number of Staff</b>   | Tell us how many staff you have in your organisation. If you have none, enter 0.   |
| <b>A9</b>  | <b>Number of Volunteers</b>  | Tell us how many volunteers you have. If this is not applicable to your organisation, enter the value 0.   |
| <b>A10</b> | <p><b>What other local organisations, statutory or voluntary, do you partner with whether formally or informally?</b></p> <p>(330 words)</p> | <p>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.</p> <p>We do want to hear about partnerships or existing informal working institutional relationships already in place. You need to name the organisations you will be working with.</p> <p>We are less interested in organisations 'that have expressed interest' as this may not always result in a partnership arrangement.</p>   |

## B. FINANCE AND IMPACT MANAGEMENT

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| <b>B1</b> | <b>What was the total annual income of your organisation in the last financial accounting period?</b>         | <ul style="list-style-type: none"> <li>• This is your organisation's Total Annual Income as given on your most recent annual accounts.</li> <li>• If your income was over £500,000, you are not within our priority to focus on small to medium sized organisations.</li> <li>• Give your answer in pounds only, do not include pence.</li> <li>• Do not include £ sign or commas</li> </ul>   |
| <b>B2</b> | <b>What was the total annual expenditure of your organisation in the last financial accounting period?</b>    | <ul style="list-style-type: none"> <li>• This is your organisation's Total Annual Expenditure as given on your most recent annual accounts.</li> <li>• If your expenditure was over £500,000 you may be given a lower preference as the Trustees may consider you are not within our priority to focus on small to medium sized organisations.</li> <li>• Give your answer in pounds only, do not include pence.</li> <li>• Do not include £ sign or commas.</li> </ul>  |
| <b>B3</b> | <b>What was the net operating surplus/loss for your organisation in the last financial accounting period?</b> | <ul style="list-style-type: none"> <li>• This is your organisation's Net Operating Surplus or Loss as given on your most recent annual accounts.</li> <li>• <b>If your organisation has a significant Net Operating Loss, please provide further information as to why this is the case in your answer to Question B6</b></li> <li>• Give your answer in pounds only, do not include pence.</li> <li>• Do not include £ sign or commas.</li> </ul>   |
| <b>B4</b> | <b>What were the current unrestricted reserves of your organisation?</b>                                      | <ul style="list-style-type: none"> <li>• This is your organisation's Unrestricted, Free or General Reserves as given on your most recent annual accounts.</li> <li>• 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.</li> <li>• <b>If your organisation holds less than 3 months or more than 12 months operating costs in unrestricted reserves, please provide further explanation of the current financial situation in Question B6.</b></li> <li>• Give your answer in pounds only, do not include pence.</li> </ul> |

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|           |   | <ul style="list-style-type: none"> <li>• Do not include £ sign or commas.</li> </ul>  |
| <b>B5</b> | <b>What is the net current assets of your organisation?</b><br><br>   | <ul style="list-style-type: none"> <li>• This is your organisation's Net Current Assets aka Liquid Assets as given on the balance sheet your most recent annual accounts.</li> <li>• You will need to find the Current Assets total. This should not include any Fixed Assets amount for buildings, equipment etc. From this total, subtract the total of any Creditors – “Amounts falling due within one year”. The result will give you the Net Currents Assets figure we require.</li> <li>• Give your answer in pounds only, do not include pence.</li> <li>• Do not include £ sign or commas.</li> </ul>   |
| <b>B6</b> | <b>Further explanation of financial reserves and/or net operating loss reserves and/or net operating loss.</b><br><br>(330 words) | If you have low unrestricted reserves (less than 3 month) or high reserves (more than 12 months), or a significant negative net operating loss, please give further explanation here.   |
| <b>B7</b> | <b>Please describe how your activities will lead to the impact outcomes you seek to achieve.</b><br><br>(660 words)               | <p>We want to understand how your organisation creates positive outcomes. Please explain in simple words how your project or service makes a difference in people's lives.</p> <p>What measureable impact can we expect as a result of your project or intervention? We are interested to know what outcomes will result, and how this change will happen for your target beneficiaries. Please try to describe this in qualitative and quantitative terms.</p> <p>A theory of change sets out how your organisation or project will bring about social impact, and is the basis for impact measurement.</p>  |
| <b>B8</b> | <b>What methods will you use to measure these outcomes?</b><br><br>(160 words)  | <p><b>Please describe your method for data and evidence gathering.</b> We want to know that you have both defined outcomes for your work and a plan for how to measure impact.</p> <p>Measuring means using data and evidence, both quantitative and qualitative, to gain useful insights about your charity's work. It's about understanding whether your project or service made a difference in people's lives.</p> <p>Measurement could involve keeping a head count of numbers of individuals attending activities. You might also use client feedback surveys. You might also want to look at recognised impact measurement practices, such as Outcome Stars.</p> |

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|            |                                    | We expect counselling services and projects relating to addiction, physical or mental health to use a best practice method of impact measurement.  |
| <b>B9</b>  | <b>Target 1</b><br><br>(160 words) | <p><b>Define a measureable impact target that your organisation can report against.</b></p> <p>We want to know that you have targets for your work. Please choose an output target using data or evidence that your organisation is able to measure.</p> <p>Targets should relate to impact for your beneficiaries.</p> <p>We will ask you to report against these targets when you submit a progress report.</p> <p>You might want to choose a target related to beneficiary numbers, the number of participants successfully completing a course, numbers entering employment or volunteering, improvement in outcome stars, uplift in feedback survey results, or other evidence-based data that you collect from beneficiaries.</p> <p><u>Examples of targets:</u></p> <ul style="list-style-type: none"> <li>• To scale up training to reach 500 individuals across 3 regions in one year.</li> <li>• To set up 12 new support groups in 18 months.</li> <li>• To achieve a 20% increase in reported parental wellbeing.</li> </ul> |
| <b>B10</b> | <b>Target 2</b><br><br>(160 words) | <p><b>Define a measureable impact target that your organisation can report against.</b></p> <p>As above.</p>   |
| <b>B11</b> | <b>Target 3</b><br><br>(160 words) | <p><b>Define a measureable impact target that your organisation can report against.</b></p> <p>As above.</p>   |

## C. 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

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| <b>C1</b> | <b>If your annual financial accounts are more than 6 months old, please upload your management accounts.</b> | 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).<br><b>Please note that re-uploading a file will overwrite the currently uploaded file.</b> |
| <b>C2</b> | <b>Please upload a recent impact report, if available.</b>   |  |
| <b>C3</b> | <b>Please upload any new/updated information not yet submitted with the previous application.</b>            |  |

## D. DECLARATION

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| <b>D</b> | <b>Click to confirm that all the information given on this form is correct and current.</b> | <p>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:</p> <ol style="list-style-type: none"> <li>1. You confirm you have the appropriate level of authorisation from your organisation to make this application. Forte reserves the right to request additional information from your organisation by phone, email or letter to confirm your authorisation.</li> <li>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.</li> <li>3. You confirm that if any grant is made by Forte 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.</li> <li>4. You confirm that we may hold and process the information you have provided on a secure server. The information will be shared with Forte trustees and staff. It may also be shared with other trusts and foundations, who seek Forte's opinion on your organisation, work and project for which you are seeking funding.</li> </ol> <p><i>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.</i></p> |
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