

Guidance Notes for Grant Applicants

The Gannochy Trust Grant Strategy July 2022 to June 2027

General Guidance Notes

The Gannochy Trust has developed one application form for the different range of funds that are outlined in the Grant Strategy. You should answer every question however if there is a section that does not apply to you then please insert N/A (not applicable) in the space. The application form has been designed to be flexible to allow you to insert additional lines as required (within the budget element) and the narrative boxes will expand as you type within them.

ORGANISATION INFORMATION

Legal Name of organisation/Name that you are known by

This is the name on your governing document that matches the name on your accounts and bank statements, and your Office of the Scottish Charity Regulator (OSCR) or Charity Commission entry. If you are commonly known by another name, please tell us.

Charity Number and Year Established

To apply for funding from the Gannochy Trust you must be a charity registered with the Office of the Scottish Charity Regulator (OSCR). Please provide your charity number, which we will check with OSCR, and the year in which the charity was established. Please also provide your Company number if applicable.

Organisation Main Office and Website Address

The main office address for the organisation together with your postcode, telephone number and website address (if applicable).

Main Contact

Details of the person who will be our main point of contact and answer any queries during the assessment process. We will also need their address if different to that of the organisation (they may work out of a different office), direct telephone number and email address. Depending on the size of the organisation this may be a Trustee, Chief Executive, Manager or Fundraising staff.

Board of Directors/Trustees

We expect your organisation to have a minimum of 3 directors or trustees that hold regular meetings. Please provide us with their name and position on the board/committee.

YOUR ORGANISATION

1. Give a brief description of your organisation and who it supports

This section provides an opportunity to tell us about: your organisation and its main aims; who your beneficiaries are; and describe the range of services you provide to support them.

2. Please state the number of people involved in your organisation

Staff: Please tell us the number of full-time and part-time staff that are employed by your organisation.

Volunteers: This is the number of people that help your organisation to deliver services without payment.

3. Within which local authority area(s) will the activity take place?

You should include the local authority area(s) (including Scotland-wide if appropriate) in which the specific project or activity will take place. Please note that projects taking place specifically within Perth and Kinross have different outcomes to 'Rest of Scotland' activity and can apply for a larger range of funding.

4. What type of grant are you applying for?

- **Project Funding:** Costs associated with the direct delivery of a specific project or activity which could include salaries or sessional staff, activity costs, volunteer expenses, transport, training costs and a contribution towards overheads.
- **Core Funding (Perth and Kinross only):** The Trust recognises that the core costs of running an organisation can help to create, maintain and build strong organisations; enable flexibility and responsiveness; and strengthen the sector generally. Core costs might include salaries, overheads and day to day operational running costs but are not restricted to these.
The Trust will consider core grant applications from charities which have been a grant recipient within the last three years and therefore have an established relationship with the Trust. New applicants who have not previously received funding are expected to apply for project funding in the first instance.
- **Capital Funding (Perth and Kinross only – as part of a two-stage process):** Applications for capital grants could include: the purchase of equipment, land and/or buildings; the costs associated with the creation or improvement of an asset – a new construction, expansion, refurbishment/renovation or replacement. Applications for capital funding will go through a two-stage process. You should download and complete the Stage 1 Project Summary Report and email this to grants@gannochytrust.org.uk The Trustees will then review your submission and decide if your project will progress to Stage 2 – which is submission of a full funding application.

5. What level of funding are you requesting?

- Small Grant – £1,000 to £10,000 per annum for up to three years
- Main Grant - £10,001 to £30,000 per annum for up to three years
- Major Grant (Perth and Kinross only) – over £30,001 per annum for up to three years
- Capital Grant (Perth and Kinross only) – as part of a two-stage process

In order to establish or re-establish a relationship with the Trust, first time applicants or organisations that have not received funding during the past ten years should only apply for one year project funding. If you are not sure if you fall into this latter category then please contact the Trust Office for assistance.

6. Which Gannochy Trust aim(s) are you applying under?

The Trust has different criteria for charities working in Perth and Kinross, than those across the rest of Scotland. We intend to fund charities to deliver the undernoted aims:

- Perth and Kinross
 - To improve the quality of life
 - To improve the availability or quality of the built and natural environment for wide community use
 - To develop and inspire children and young people (from age 0-21 inclusive)
- Rest of Scotland
 - To develop and inspire young people (from age 11 to 21 inclusive)

We appreciate that work within Perth and Kinross may fit more than one of the Gannochy Trust aims and would ask you to select the aim(s) which most closely align to the funding you are requesting and the Trust's outcome(s) you choose below.

7. Please select up to three of the Gannochy Trust outcomes that you hope to achieve with the funding.

All of the grants we make will meet at least one of the Trust's outcomes (the impact or long term change we hope to make) which are listed on Page 4 of the Grants Strategy 2022-2027 and replicated below. Some applicants may find their project or activity meets more than one of these outcomes. If this is the case, you can identify up to three of those listed that fit your work. Please note, you do not need to address more than one outcome. Applications will be assessed on the quality of your work rather than the number of outcomes that you are working towards.

If you consider that you address more than three of the Trust's outcomes please select the three where you believe your work has the greatest impact.

Regardless of whether you are applying for capital, project or core funding, the activity that you outline in Question 8 of the application will have to clearly demonstrate how it meets the aim(s) and outcome(s) that you have chosen.

	Perth and Kinross			Rest of Scotland
	AIMS	AIMS	AIMS	AIMS
	To improve the quality of life	To improve the availability or quality of the built and natural environment for wide community use	To develop and inspire children and young people (From age 0 to 21 inclusive)	To develop and inspire young people (From age 11 to 21 inclusive)
	OUTCOMES	OUTCOMES	OUTCOMES	OUTCOMES
	At least one of these:	At least one of these:	At least one of these:	At least one of these:
	<ul style="list-style-type: none"> Positive change in people's lives and communities. Increased inclusion, enablement, independence, mental health and wellbeing. Increased access to employment, volunteering, learning, culture, sport, and leisure opportunities. Increased equality of opportunity and active citizenship. 	<ul style="list-style-type: none"> Greater access to services and facilities. Improved infrastructure. More sustainable services and facilities that reflect local priorities. 	<ul style="list-style-type: none"> Increased participation, opportunities and experiences through culture, leisure, play, environment, and heritage. Increased access to sporting opportunities at all levels of participation and ability. Increased leadership or mentoring. Accredited non-formal learning through voluntary activity in the community. 	<p>We want to focus on quality youth work programmes that work alongside young people to deliver:</p> <ul style="list-style-type: none"> Increased leadership or mentoring. Better employment options that can be tracked and measured. Accredited non-formal learning through voluntary activity in the community. <p>Programmes that lead to improved mental health or wellbeing are particularly encouraged.</p>

PURPOSE OF FUNDING

8a. Purpose

What we are looking for here is a one-line description of the purpose of the funding which we can use in correspondence with you.

Examples of a **project grant** descriptor might be:

- BeActive Development Worker Salary costs
- Youth employability support (YES) programme
- Little Stars

Example of a **core grant** descriptor might be:

- Core Funding April 2022-March 2025

Examples of **capital grant** descriptors might be:

- Extension to Village Hall
- Heating upgrade

8b Description of the work or activity, who the beneficiaries are and any collaboration/partners

This must be linked to the answers given to Questions 6 and 7. You should clearly demonstrate that the work or activity that you wish us to fund meets the Gannochy Trust aim(s) and outcome(s) that you have identified.

We want to understand what you plan to deliver and this could include information about:

- The type of service(s), activities or facilities that you will provide (e.g. support, advocacy, advice, apprenticeships, programmes of activity, skills development and accreditation, mentoring, new building or refurbishment)
- Who will deliver the service (e.g. counsellor, volunteer, advice worker, youth worker)
- Who the beneficiaries are and the frequency of contact (e.g. 1 day a week for 12-weeks; 5 days a week for 6-months etc) and how the services are provided (group-based or 1:1)
- How have the beneficiaries been identified (e.g. referral agencies)

- For capital applications, what difference will the new or renovated facilities make to your community or beneficiary group
- If relevant to your application: the number and type of accredited awards; number and type of training opportunities

The Trust is keen to support collaborative work/partnerships that deliver a better service, improve efficiency and/or effectiveness and lead to better outcomes for beneficiaries of our funding. It also helps us to see how you link with other organisations in the community. If your work or activity will be delivered with partners please provide details within this section.

8c. How have you identified the need for this work, activity or facility? Who have you consulted and how have you included the views of your beneficiaries in this?

This is an opportunity to demonstrate how your charity contributes towards a solution to a particular need. For example:

- what are the challenges facing the individuals, groups or communities that you support?
- how are you responding to these challenges?
- what needs do your target group have?
- how do you know that they have this need?
- why is it important that these needs are met?
- are your facilities appropriate to your needs?
- how will new or improved facilities meet the needs of the group or community they serve?

8d. What targets/indicators will be measured to show that you have met the intended outcome(s)?

We would like you to identify the targets or indicators you will use to measure how well you have met the intended outcome(s). These may be tasks, services or activities. Examples include: running groups, courses or programmes of activity; producing and distributing information; building a community centre; access to and use of facilities. It is useful to use action words to describe what you will do such as: to provide, to run, to organise, to produce, to recruit, to support, to promote etc. We would also like to know the number of people that you aim to involve and benefit from your activity. The activities should clearly link to a more detailed description within Question 8b of your application.

What methods/criteria will you use to evaluate this work?

You should describe how you will gather the evidence which will demonstrate that you have been successful. The evidence can come from a range of sources, including: things you observe; things you are told by service users (casual feedback, questionnaires, video diaries, focus groups etc.); things you are told by people in service users' lives (e.g. feedback from parents, carers); records you keep (e.g. attendance, assessments); external statistics (comparisons with your service users); Awards and standards achieved by your organisation and/or your service users (e.g. Youth Achievement Awards, Duke of Edinburgh, Saltire). The evidence can be both quantitative and qualitative.

The Gannochy Trust requires all grant holders to report on how they have achieved their intended outcome(s) by completing an End of Grant Report. If you receive multiple year funding, an annual End of Year Report will be required. Please note that a successful report will release the following year's grant. The End of Year/Grant Report template can be downloaded from the Trust's website.

You may feel that the last thing you want to think about at the start of your work or activity is the Annual or End of Grant Report but considering it now will help you complete this section of the application form and plan what information you will need to measure and collect from beneficiaries about the impact that your work has had.

In particular, we want to understand from your application:

- How you will know if the work has been a success and that you have made a difference, change or impact?
- What steps will you take to collect quality data to assess and improve the service – both qualitative and quantitative methods?
- That you have considered what you will need to measure to find out whether you have made the difference, change or impact that you had hoped for.

If you are asking us to fund existing work you may wish to reference or provide evidence on the difference it has made to the lives of the people you support (e.g. evaluation report, impact statement). If it is a new project or activity and there is evidence to demonstrate that it is effective please include this information (e.g. from a pilot).

9a. The number of staff and volunteers involved in delivery of the grant work that you are requesting support for
Within the table please provide the number of staff (full-time, and/or part-time and sessional), and volunteers involved in delivering the work.

9b. The number of people that will benefit from your proposed project

Please provide a breakdown by the age categories of those that will directly benefit as a result of the grant requested. If it's a core or capital grant, list all beneficiaries. If it is a project grant, just list those that you expect to benefit from the project.

10. Will you need to recruit any new staff to fulfil your project/proposal

If yes, then you should detail the name(s) of the post(s) and whether these are full, part-time, or sessional. We will also need a copy of the job description and person specification which should include the salary range that you will offer for the post(s).

11. When would you like this funding to start and finish

This should be a realistic timescale. Depending on when your application arrives with us, it can take up to 4 months from its receipt to a decision being made and advised to you. Capital projects may take longer due to the 2-stage process. For applications requesting core funding we expect the timescale to reflect your annual accounting period.

12. Any additional information you wish to share with us about your application.

If required, please use this section to tell us anything else that you think it would be useful for us to know in support of your application.

BUDGET

13. Budget

The Gannochy Trust will not fully fund organisations, projects or activities. We will expect you to provide details of other funding including any contribution from your own funds, if applicable. As a general rule, the Trust will not fund more than 50% of a project or core costs within Perth and Kinross, and 30% of project costs within the Rest of Scotland.

General guidance

- You may insert as many additional lines within the budget template as required
- The budget should include all the costs of your project or activity and a contribution towards overheads, if applicable.
- Full cost recovery (both the direct costs of the project and the relevant portion of overhead costs) will be considered by the Trust where the calculations are considered to be fair, reasonable/proportionate and associated with the project or activity being applied for.
- If you are applying for multi-year funding we expect to see a yearly increase in costs and salaries, if appropriate, or to take account of development or growth.
- If you are applying for core funding we would expect to see a full cashflow or budget breakdown of your organisational costs and income for each year.
- If your budget includes salary costs you should indicate if this is a full or part-time post and include the employers NIC and pension costs.
- You should consider what in-kind contributions you will be able to secure and be clear about the basis for any estimates. Be as realistic and reasonable as possible.

Projected expenditure

Please include a detailed breakdown of the main items of expenditure associated with your project, core or capital request.

Confirmed income

The Trust would expect to see a contribution towards the project, core or capital request from the charity's own funds where possible. This section should also include confirmed income from other sources detailing the funder and the amount.

Anticipated income

Please list information on other funding applications which you have made or intend to make. You should provide the name of the funder, the amount requested and when a decision is expected (if known).

Request to the Trust

The amount you are applying to the Trust for.

Any comments you would like to make on the budget

This is an opportunity for you to provide an explanation on the financial information that you have provided within the budget template (if required).

GOVERNANCE, POLICIES AND PROCEDURES

14. Governance

The Trust is receiving a growing number of applications where a trustee is also a paid employee. The Trust will accept applications from these organisations where they can demonstrate compelling reasons why it is in the best interest of the charity, that their governing document allows for this, and they have a policy in place to mitigate any conflict of interest.

Policies and procedures

The Trust is committed to ensuring that the beneficiaries of our funding, particularly children, young people and vulnerable adults are kept safe from harm. If applicable, we expect you to be able to meet the requirements outlined in Question 13 and you may be asked to provide evidence or copies of appropriate policies. Please do not send these to us with your application – if we require them as part of the assessment process then we will contact you.

DECLARATION

15. Declaration

The application form should be signed by one of the following people - Chair, Vice-Chair, Treasurer, Secretary, or Chief Executive Officer. The grant application form must be submitted electronically in MS Word format and we will accept an electronic signature.

CHECKLIST

16. Checklist

Please ensure that you submit a copy of your most recent signed annual accounts with the application form and if appropriate a job description for any staff post(s) included in the budget and relevant evaluations or business plans.

If you are a new charity, we will require a copy of your constitution or governing document together with a copy of a recent bank statement and a projected cashflow statement for the first year of operation.

If you are seeking funding for a capital project (only available in Perth and Kinross) you should submit a Stage 1 Project Summary for considered by our Trustees in the first instance. If you are invited to progress to Stage 2 (submission of a full funding application) you would be expected to also provide us with the undernoted information:

- Information on the current title or lease of the building or land and any plans regarding the future of the title
- Approval/confirmation from the landlord (if the property or the land is not owned by the organisation/project)
- Information/evidence of how the local community would benefit from the project and the groups/numbers likely to be involved
- Justification and/or evidence that such additional or new community space is required and not available elsewhere, and is not to the detriment of other community venues or facilities
- Plans (preferably A4 or A3)
- Fully costed schedule of the proposed work

Help and Support

Your completed application and accompanying documents should be emailed to grants@gannochytrust.org.uk or posted to The Gannochy Trust, Pitcullen Crescent, Perth PH2 7HX.

If you have any queries, please do not hesitate to contact the Grants Team:

**The Gannochy Trust, Pitcullen Crescent, Perth, PH2 7HX Tel: 01738 620653
Scottish Charity Number: SC003133**