# GUIDANCE FOR GRANT APPLICANTS

# GROUPS / ORGANISATIONS

1. **WHO MAY APPLY?**
   1. **Applications must be for the benefit of residents / not for profit organisations** **located within the Trust’s area of benefit**, defined as the council wards of Birmingham City Council known as the Sutton Coldfield constituency. A Boundary Map of the Trust’s area of benefit can be found [here](https://www.google.com/maps/d/u/0/viewer?mid=1QMsebt4XAjefUa92fWFuHCPj6RErMrg&ll=52.564553688158576%2C-1.8170302355832701&z=12).
   2. Exceptionally, applications may be considered from organisations based outside Sutton Coldfield, if these meet the needs of a significant number of residents and there is no similar local provision (For example, medical, hospice and special needs provision).
   3. Organisational applicants must be Not for Profit: i.e. Registered Charities; Community Interest Organisations (CIO), Constituted Clubs; Companies Limited by Guarantee; Local Government / Educational establishments previously funded by the LEA; or a small organisation with a Community Bank Account. Preference to award is also usually given in this order.
2. **WHEN MAY APPLICATIONS BE SUBMITTED?**
   1. The Grants Team undertakes pre-application Due Diligence. Following this, project proposals should be discussed with the Grants Team prior to submission of a full application. The Trust supports both capital and revenue projects. Usually, three years will have elapsed since the last grant for capital projects.
   2. Funding requests are considered by the Grants Committee, which meets eight times a year. For Sport and Religion category grants, funding applications will be considered bi-annually in April and October of each year. Where applications are for £55,000 or less, the Grants Committee makes a decision, and applicants are notified as soon as possible. For requests over £55,000, a brief project outline is presented to the Grants Committee, who will decide if a full application can be submitted. The Board of Trustees makes all decisions on grant requests over £55,000. For all applications, the Committee has delegated authority to decline, reduce or recommend approval of a final decision to full the Board of Trustees, which meets quarterly.
   3. At all stages, staff at the Trust will give assistance to those making applications. For example, projects and applications can be discussed with the Grants Team. Applicants can also request advice about timing the submission of applications and at which meeting they are likely to be considered.
   4. Applicants should ensure that the online funding application and required documentation is received at least six weeks prior to the next Grants Committee Meeting for consideration. Further time may be required to allow for queries to be raised and answered. When the number of applications is high, some may be deferred to a later meeting. If all required information and document is not provided, this may result in a delay in assessing the application and submission to a grants committee for decision. A list of application submission deadlines and Grants Committee meeting dates can be found at the end of Application Guidance document.
   5. **Schools:** The Trust has a School’s Grant Scheme in place, to ensure that all schools that we support, are eligible to apply within a specific timeframe. The scheme operates on a three-year cycle, based on the level and frequency of previous awards. Grants available to individual schools are based on the number of Pupils on Roll. Schools are invited to apply for a grant in specific academic years within the three year cycle. Please contact the Grants Team to discuss when your school is eligible to submit a funding application. Guidance will also be given as to the amount that can be applied for.
   6. For all projects, applicants must discuss project proposals with the Grants Team, prior to submission.
   7. If you are a current grant holder, you may not be eligible to apply again until your current grant period has come to an end. Please contact us if you are not sure about your eligibility.
3. **APPLICATION GUIDANCE FOR APPLICANTS**

As you prepare to complete your application, please refer to this document. Here we provide the full list of questions you will find on the online form, and guidance on how to complete each section of the form. Whilst some questions are self-explanatory, we have provided some explanation on others to clarify the information we need from you.

Once you are ready to complete the online application form, you can always save it and resume it at a later stage, if necessary (your unique ‘Save & Resume’ link generated by the online application form is valid for 30 days).

Applications are submitted via the Trusts online portal which is accessible once you have completed our [eligibility checker](https://formapply.formstack.com/forms/scct_eligibility_quiz). Further information can be provided in MS Excel or PDF format (i.e. Supporting Documents, Costings and Annual Accounts). A list of the application questions and guidance can be found below:

* 1. **What type of grant are you applying for?** Please chose from the below.
     1. £1k and under
     2. Over £1k
     3. Festive Grant
  2. **Name or Group or Organisation:** This should be as shown on your Governing Document if applicable.
  3. **Type of organisation:** Please chose from the drop-down menu.
  4. **Registered charity number:**
  5. **Registered company number:**
  6. **Date established:**
  7. **Address/ Meeting place:** Please list the organisations registered address or regular meeting place.
  8. **Brief description of the Group/Organisation: Please include percentage of members or users who are Sutton Coldfield residents:** Please provide a brief description of the organisation, including the type of organisation/the organisations legal entity, when the organisation was established, its objects, history, and development. Please tell us about the number of members / users, their age range and any membership fees paid. If not all of your members / users / potential project beneficiaries, are residents of Sutton Coldfield, a full explanation and percentage breakdown should be given. For Schools, please include the number of pupils currently on roll.
  9. **Name and Position of Main Contact**: This should be someone with the relevant authority, to submit an application on behalf of the organisation.
  10. **Contact Address:** Please list an address where key correspondence can be sent.
  11. **Email Address:** The email address provided will be the main form of sending and receiving correspondence.
  12. **Contact Telephone Number:**
  13. **Project Name:**
  14. **Please tell us about the proposed project for which a grant is requested:** A full account of the purpose of the project for which a grant is requested.
  15. **Total Project Cost in £ and how much grant amount is requested in £:**
  16. **When will the project start and finish:** Please note the Trust is unable to support retrospective grants and projects that have already started.
  17. **What need or issue will the project address:** Applicants are required to demonstrate a clear need and demand for the project, identifying the issues in which the project aims to address.
  18. **Please tell us which benefit category your project falls within.** The Trust supports a broad range of activities that share a commitment to making a positive impact to the lives of the communities in the former Borough of Sutton Coldfield and have effective solutions to helping those most in need.Further details on the benefit categories the Trust supports can be found on our [website](https://www.suttoncoldfieldcharitabletrust.com/who-we-help.htm) and include**:** 
      + - ***Relief of Need:*** *The Relief of those in Need by reason of youth, age, ill-health, disability, financial hardship or other disadvantage.*
        - ***Education****: The Trust has supported the advancement of education since the 1700s.  In recent years, trustees have agreed a scheme to support Sutton Coldfield schools.  The School Grant Scheme operates on a three-year cycle to ensure that all eligible schools can apply within this time frame.  Schools are prioritised by the date of the last grant awarded and the amount of grants provided over a ten-year period.  Grants are awarded to support projects and the purchase of items not generally statutorily funded.*
        - ***Arts, Culture, Heritage, or Science:*** *The Trust supports the arts and Sutton's heritage in their widest sense.*
        - ***Religion:*** *The Trust supports projects that enables all faiths to make a contribution to the community life of Sutton Coldfield and supports the varied services faiths offer to a wide range of residents. Please note that projects that support the promotion of any religion are not eligible for funding.*
        - ***Health or the Savings of Lives:*** *Grants are made to organisations which provide invaluable contributions to the health and well-being of Sutton Coldfield residents.*
        - ***Citizenship or Community Development:*** *The Trust supports a wide range of projects that foster the advancement of citizenship and community development. This can include supporting youth or community organisations, providing equipment and resources, refurbishing premises and local activities and events that supports community need.*
        - ***Amateur Sport:*** *The Trust supports all types of amateur sports clubs and projects that seek to increase participation and access to sport.*
        - ***Environmental Protection or Improvement****: This can include projects that aim to protect the environment and improve open spaces, allotments, and nature reserves within Sutton Coldfield.*
  19. **Please tell us about the benefit and impact that will be achieved as a result of the project:** Please tell us about the difference your project will make and how you will know whether this has been achieved. It is important to show that the project will provide measurable benefits that can be monitored and reported against.
  20. **Please tell us the number of beneficiaries your project hopes to reach over the delivery of the project, and how this will happen.** This should relate to the number of people that will benefit as a result of the project and details on how this will be achieved.
  21. **Number and percentage of Sutton Coldfield members or users that will benefit and/or engage in the project. Residents of Sutton Coldfield are defined by those located within the Trust’s area of benefit** [(SCCT Boundary Map](https://www.google.com/maps/d/u/0/viewer?mid=1QMsebt4XAjefUa92fWFuHCPj6RErMrg&ll=52.564553688158576%2C-1.8170302355832701&z=12))
  22. **Please tell us about any consultation carried out to support the development of the project proposals and demonstrate need and demand.** This can include people who have been involved in developing project proposals, current users, non-users and those you wish to engage with as a result of the project. Please tell us how feedback from any consultation has been used to shape and inform the project.
  23. **Financial information – please provide the following as shown in the supporting documentation.**

|  |  |
| --- | --- |
| **Financial Information** | **£** |
| Annual Income |  |
| Annual expenditure |  |
| Free reserves |  |

If free reserves are greater than 6 months operational expenditure, please provide a full commentary/rationale for the need of this grant and details of the reserve policy.

* 1. **Project Costs - Please provide a breakdown of project costs using the table below including details of any partnership or match funding and the status of this match funding:** Where appropriate please show that reasonable estimates from a range of sources have been obtained. Applications are often more successful if a significant contribution is made by the applicant or made from other sources of funding.

|  |  |  |
| --- | --- | --- |
| **Cost Heading/Item** | **Description** | **Cost** |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total Project Costs:** |  | |

**Partnership Funding:**

|  |  |  |
| --- | --- | --- |
| **Secured Funding From:** | **Status** (applied, confirmed, secured) | **Amount** |
|  |  |  |
|  |  |  |
| **Match funding Total** |  | |
| **Shortfall** |  | |

* + 1. **Value Added Tax –** Please confirm whether VAT is included in the estimated costs, and your VAT status (some organisations may be exempt from VAT or able to recover VAT payments). We cannot cover the costs of VAT that you can reclaim. It is your responsibility to seek appropriate advice about reclaiming VAT and to check with Customs and Excise if there is any doubt. Schools should check with the Education Authority or Secretary of State for Education. The Trust will not cover any VAT if this is intended to be reclaimed by the beneficiary. Organisations cannot claim additional amounts to cover VAT after the application has been approved.
  1. **For projects over £1,000, if you are offered a reduced award what would be your strategic plan for raising further amounts or scaling the project:** You may want to consider if you would deliver a smaller proportion of the project or whether you would prioritise certain element of your proposals. In these circumstances, please tell us how the project would progress or whether it would be unable to take place.
  2. **What will happen to the delivery of the project and/or services upon completion of the funding period.** Please indicate whether the project, services or work will continue beyond the grant period. If it will, please tell us how you will ensure it is sustainable overtime.
  3. **If the grant applied is over £1,000, please tell us how the project will be financially sustainable and how you plan to continue to engage with people after the project ends. Please tell us about any long-term delivery plan or strategy for the project/service**. You may be asking us to support an ongoing activity which is core to your service delivery, and which can only be sustained by further fundraising next year and in years to come. If that is the case, please tell us that. You may be asking us to pump prime a new initiative (a new post, for instance) and working towards the cost being absorbed by another organisation in the long term. If so, please do let us know. Or you may be asking us to support a one-off project such as a new set of information literature or a new website, which will not require ongoing costs in the future.
  4. **For capital projects, please tell us how you will manage and maintain any work carried out.**
  5. **For projects over £1,000 please tell us who would manage the delivery of the project and what is the organisation’s experience of running similar projects**.
  6. **Please tell us about how the group supports equality diversity and inclusion and how the project will help support and incorporate these principles.**

**SUPPORTING DOCUMENTS:**

**All Projects:** Please provide the following documents when submitting your funding application:

* A copy of the groups governing document/ constitution.
* A copy of a bank statement showing the current balance in your groups/organisations name to verify bank details.

**For those projects over £1,000 please also provide:**

* A copy of the most recent annual accounts
* A copy of your EDI statement or policy
* A copy of your safeguarding policy

**For applications from Schools, please also provide:**

* Annual Budget out-turn statement showing any carry forward surplus or deficit.
* Current year’s total income, budget, expenditure and forecast or likely carry forward or deficit balances.

1. **HOW ARE APPLICATIONS PROCESSED?**
   1. The Grants Team will be happy to informally discuss project enquiries, prior to submission of a full application, at an early stage.
   2. Following an assessment of the application, the Grants Team presents requests and applications to the Trustees and answer any questions that may arise to assist the decision process. Trustees receive a clear written summary of the requests and extracts of accounts in advance of the meeting. All decisions are taken by the Trustees, who make one of the following responses:
      1. award a full grant.
      2. award a proportion of the sum requested.
      3. defer any award pending further information.
      4. decline the application.
   3. The decision of the Trustees is communicated to the applicant in writing as soon as possible after the meeting together with arrangements for claiming the grant. The Trustees' decision is final.
2. **OTHER MATTERS**
   1. Details of the Trust’s aims and activities are published in an Annual Review, along with a full list of grants awarded. This is available in local libraries or can be obtained from the Trust’s office. Details are also sent to the local press, the Charity Commission and published on the Trust’s website <https://www.suttoncoldfieldcharitabletrust.com>
   2. The income available for grant making is derived from investments, rents etc. and therefore vary from year to year. Grants are made from surplus funds after the Trustees have attended to their first priority, which is the maintenance of their 46 Almshouses. SCCT often receives many more requests than it can possibly hope to support. This means that, even if a proposal meets all conditions, SCCT may not be able to provide funding.
   3. The Trust may make enquiries with other Funding providers.
   4. The Trust will make no public comment about applications received or being processed, until such time that an award is made, following which it will publish details of the award on its website, Annual Review and other Media. Applications are considered as deemed consent to Publish. Photographic Consent will be requested where required. Applicants are also requested to acknowledge Grant Awards in suitable Media.

### If an application is approved, the organisation will be sent full details about arrangements for claiming the grant. Capital Grants are usually expected to be claimed within 12 months of the award.

### **It is normal procedure for SCCT to pay suppliers’ and contractors’ invoices** after receiving confirmation that goods or services have been satisfactorily received.

### If appropriate, organisations can apply in advance for agreement to the reimbursementof costs.(It must still demonstrate that it has paid an account from its own funds and supply copies of the original invoices and evidence of payment).

### **In all cases, it is essential that organisations have all invoices made out in their name, not in the name of SCCT.**

**ORGANISATIONS SHOULD ADDRESS COMMUNICATIONS TO:**

The Grants Team

Sutton Coldfield Charitable Trust

Lingard House

Fox Hollies Road

Sutton Coldfield

B76 2RJ

**Telephone 0121 794 0970**

**Emails:** [grantsmanager@suttoncharitabletrust.org](mailto:grantsmanager@suttoncharitabletrust.org)

**Meeting Dates 2024-2025**

|  |  |  |
| --- | --- | --- |
| **Application Submission Deadline** | **Grants Committee Meeting** | **Board Meeting** |
| 16 October 2024 | 27 November 2024 | 12 February 2025 |
| 11 December 2024 | 22 January 2025 | 12 February 2025 |
| 15 January 2025 | 26 February 2025 | 14 May 2025 |
| 26 February 2025 | 09 April 2025 | 14 May 2025 |
| 09 April 2025 | 21 May 2025 | 3 September 2025 |
| 4 June 2025 | 16 July 2025 | 3 September 2025 |
| 6 August 2025 | 17 September 2025 | 12 November 2025 |
| 10 September 2025 | 22 October 2025 | 12 November 2025 |
| 15 October 2025 | 26 November 2025 | February 2026 |

Applications will be considered by the date that they are received.

Applicants should ensure that the required documentation is received **at least six weeks** prior to the next Grants Committee Meeting for consideration. Further time may be required to allow for queries to be raised and answered. When the number of applications is high, some may be deferred to a later meeting. If all required information and document is not provided, this may result in a delay in assessing the application and submission to a grants committee for decision.

**The Trust Offices are open 8:30 a.m. to 4 p.m. Tuesday, Wednesday & Thursday.**