



# Application Guidelines

We recommend that applicants first review the Trust's funding criteria before applying for a grant to ensure that their application is eligible. Please see the ['What We Fund'](#) webpage and ['Restrictions'](#) webpage.

## Applying online

If you wish to make an application simply click on the 'Online application' button, found on the 'Apply for a Grant' page on our website. The points below will assist with your completion of the form, along with the FAQs document. **The Trust only accepts online applications. These must be submitted when a grant round is open.** We operate two rounds of grants per year, and each round is open for approximately 3 weeks. If you have any difficulties or queries please contact the Trust Manager at [s.wright@agneshunter.org.uk](mailto:s.wright@agneshunter.org.uk)

## Newly established charities

Please ensure you meet our eligibility criteria as stated on the ['Restrictions'](#) webpage. Also refer to Section 1 in the FAQs document for specific details on extra information that we will require.

## Returning applicants

Please review this document in full as the online application form may have been updated since your last grant application to the Trust. If you had previously been contacted during the sift/assessment period for further details, do ensure that your new application includes that additional information you had supplied in response (if requesting funding for the same/ similar service provision).

## Completing the online application form – Helpful hints

- 1) We recommend using Google Chrome as the preferred web browser for the completion of your online application. This is particularly useful for the print function before final confirmation of your completed online form, however it is not essential.
- 2) The online form can be scrolled through in its entirety prior to completing, and you will not lose any information. There are six sections to the form, with Section 1-3 requiring the most input.
- 3) You may complete the form in any order, with the exception of Section 6.
- 4) If you would like a paper copy/ blank template to work on before completing the online form you can download a blank Word document version using the sub-link in the top right corner of the online form. This Word document is for reference only and does not constitute a formal application form. You can then copy and paste each

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answer into the relevant section of the online form. **We strongly suggest that you save a copy of your form content on your own computer – either using this Word document template or your own document version.**

- 5) As you complete the application form (once the grant round is open), you can save your draft by using the Save button located at the top right of each page. This will generate a message for you to enter your email address and create a password. You can then either close the link or resume the application form. Please note that each time you click on the Save button this same email/password message will appear and you will need to re-enter the same email and password combination. This ensures that you save the most recent version of the form, and is not a duplication but part of the online process.
- 6) As long as you have saved your progress you can log-off your computer/ close the tab/ use a different computer and still return to your online application form at the stage that you had left it.
- 7) Once you have entered your email and password to save the online form, you will receive an automated email from [s.wright@agneshunter.org.uk](mailto:s.wright@agneshunter.org.uk) which will confirm this action and includes a link back to the application form. Please check the Junk folder of your email inbox in case it is in there.
- 8) Alternatively, you can resume your application form via the 'Online application' button on the 'Apply for a Grant' webpage from the website. This will open a new online application form but in the top right you will find a link titled 'Resume a previously saved form'. Click on this. (Sample below)

## Online Grant Application Form

Page: **1** 2 3 4

☐ Save my progress and resume later

[Resume a previously saved form](#)

- 9) You can only work on one online application form at any one time unless you use a different email address and password.
- 10) Remember that each new grant application is treated as a 'stand-alone' submission, so it should not be assumed that the Trust has previous knowledge of your charity and its services/projects.
- 11) Mandatory fields in the application form are marked by a red asterisk. These must be completed or you will not be able to submit your application. (Sample below)

**Project/Grant Title \***

- 12) Please note the word counts that are stated for the larger text boxes/ responses. These may be hidden until you start to type in the text box (Sample below) but they are noted in the blank Word document version.

### Full Project/Grant Details

Please provide a full description of the project/service or core costs requiring funding in the text box below. **What** do you want to do? **Who** will be involved? **Where** and **when** will it take place? **How** will it be **managed**? Also include the following: the age range of participants, referral routes/ partners, whether the service is free of charge, whether there are delivery partners, and what the "next steps" for the participant will be.

750 words remaining

- 13) You can expand the answer text boxes by holding and dragging the bottom right corner of the text box with your computer mouse.
- 14) We recommend using line breaks, numbered bullet points and subheadings in capitals to separate long pieces of information in the online form. Underlined and bold text will *not* be pulled through and paragraphs may run together.
- 15) **Section 1: Organisation details** – please supply a current contact address and emails for a main contact and alternative contact. This is for the purpose of processing and assessing your grant application, as well as future grant monitoring. The main contact will be the key point of contact during the assessment process and if a grant is awarded. By providing us with details of an alternative contact you are confirming that they have given you permission to share this information with the Trust.  
  
Later in this section you will also need to have information about any previous grant applications (over the last 5 years) to hand. You will also need to supply your registered Scottish charity number (starting 'SC0') as **only applicants registered with OSCR are eligible for funding.**
- 16) **Section 2: The Project/ Service provision (or core costs)** - you will be asked various detailed questions about the project/service (or core costs) for which you are requesting funding. At the start, a 50-word summary is required as an executive summary /brief description.

Please supply the 'start' and 'end' date of the grant funding. This reflects the period of service provision that our grant will help towards. The Trust does not award funding retrospectively, so please be aware of the Board's decision meeting dates as published on our website.

The 'Full Project / Grant Details' section should detail the service you want to deliver. What activities & why? Who are your target client groups? Where & when will it take place? Who/ which staff will deliver this and are they appropriately qualified/ experienced? Also include information on the age range of your service user, whether it is free of charge, who your referral routes are, and any delivery partners. To get a full picture of client support we also ask what the follow-on or "next steps" will be for your service users.

The Key Activities and Targets of the project/service should include concise information on duration, frequency, content, participant numbers etc. This information

will be used in any future monitoring reports to the Trust, so should be realistic and easy for you to track. This includes those grant requests towards core costs.  
(Sample below)

Key Activities/targets =

Each year we will:

- Support c.40-50 disabled young people aged 18-25yrs through activities, information and advice.
- Offer 1:1 sessions lasting 1hr/wk to approx. 20 disabled young people.
- Deliver 5 befriending groups, meeting 2hrs every fortnight at a community venue. 2 groups will be for adults (aged 18+) and 3 groups for young people (aged 8-15yrs & 16-25yrs). Each group will have 6-8 members and 6-8 volunteers. The aim is to offer as wide a selection of activities including making films, baking, crafts, and movie nights.
- Offer volunteering placements to approx. 10 participants at local organisations. Typically 4-8hrs/wk.
- Deliver quarterly "check ins" with participants to review and update their Personal Development Plans.

The Outcomes section of the form refers to the differences or changes that the service will make to your clients/ participants. Progress towards Outcomes will also be included in any monitoring reports to the Trust, so should be based on your knowledge of the client group, the service provision, and the feedback mechanisms you have in place. (Sample below)

Project Outcomes =

(Annual targets)

- 90% of participants will report improvement of symptoms/ physical wellbeing.
- 90% of participants will report increased confidence and self-esteem.
- 90% of participants will report greater happiness/mental wellbeing.
- 90% of participants will report improved social and communication skills.

Fundamentally, in Section 2 we ask about the 'need' or demand for your service provision. We are not seeking client testimonials here. Instead, please supply data/figures on service user numbers in recent years, or demand from new participants. Why is funding required now? You may also advise if your service provision is unique to your location/ to your user group.

In the 'Monitoring and Evaluation' section please summarise the methods you use to collate service user feedback against your stated Outcomes, and how regularly you deliver this and evaluate the service.

There is a final text box for any supplementary information that you wish to add. This should not duplicate narrative already provided as direct responses to questions in the form.

- 17) **Section 3: Funding and Financial details** - please supply financial information about the project/service and your organisation. The total project cost (TPC) should include all relevant delivery costs associated with the project/ service. For applicants seeking a contribution towards core costs (rather than a specific project), please

supply your organisation's forecast Total Expenditure (TE) for the duration that the grant is to cover (i.e. 1, 2 or 3 years). For both options, this figure should relate to the information in your **budget** – which is uploaded in Section 5.

The Grant Request should be the total grant amount that you are requesting, whether spread over 1, 2 or 3 years.

We also ask for accounting figures from your charity's most recent set of annual accounts: total income, total expenditure, and statutory income (if relevant). If you have anything to note (e.g. around levels of reserves, or level of income) please use the text box at the end of Section 3.

- 18) **Section 4: Authorisation** – these are mandatory questions. You will need to confirm that you have read and understood the Trust's Privacy Policy, particularly in relation to the collation, use and storage of personal information, and that you are aware of your rights. Please refer to our website\* <http://www.agneshunter.org.uk/privacy-policy/>.

The Trust also requests confirmation that **your organisation has relevant policies and procedures in place**, for example safeguarding policies, or health & safety policies. We may ask to see a copy of these documents as part of the assessment and award process.

As part of our updated funding practice, we are also capturing information from applicants on their organisation's Environmental Policy. Please select the relevant answer. You do not need to supply a copy of your policy, as this is not part of the assessment criteria.

Finally, you will be asked whether you are happy for the Trust to name your organisation on its website (if this bid is successful). However, consent for this does not affect the grant-making process.

- 19) **Section 5: Supporting documents** - you will be asked to upload relevant documents here. This includes a Project Budget or forecast organisational expenditure (Total Expenditure for the 1, 2 or 3 years). **Both should include ALL relevant expenditure and income (secured and pending) for the period of the grant requested.**

We also ask to see your most recent set of Annual Accounts, Annual Report (if you produce this), Governance document and any relevant Job Descriptions.

Please ensure that you have these documents to hand. **There is a total upload limit of 20MB. Do check your file sizes before you upload, as exceeding this limit can mean all form content is lost upon submission.**

Also remember *not* to include personal details - i.e. named individuals - in any of the supporting documents, unless it is a legal requirement to do so (e.g. Trustee names in Accounts), in line with the Trust's Privacy Policy and GDPR regulations.

- 20) **Section 6: Application submission** - please press the Submit button. This will open a Review page where you will be able to read your entire application and print it out (or print to PDF) if you require.

**You will then need to click on the Confirm button to submit your final version.** This will generate a response email from [s.wright@agneshunter.org.uk](mailto:s.wright@agneshunter.org.uk) confirming the Trust's receipt of your application and supporting documents.

**If you do not receive this confirmation email, your application may not have been submitted. Please keep a copy of this email as it contains your unique application reference and the date of the Board meeting.**

- 21) Please retain a copy of your completed grant application. You can request a PDF copy from the Trust Manager if you did not create your own copy.
- 22) By submitting a completed online application form you are confirming that the Agnes Hunter Trust SCIO is authorised to hold the personal data of any individuals identified within the form, and that you have their agreement. This information will only be used for the purposes of assessing your grant application, managing or monitoring any grants awarded, plus any related administration purposes in line with GDPR legislation. Please refer to the full Privacy Policy on the website (as stated above\*).