

Grant Guidelines Information for Applicants

July 2009

[Please note there are separate grant guidelines for Grassroots Grants and the Donarbon Community Fund.]

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An introduction to the Cambridgeshire Community Foundation

Cambridgeshire Community Foundation is an independent local charity, which aims to improve the quality of life for people in Cambridgeshire (including Peterborough) by channelling funds to grass roots communities. Individuals, families, local companies and public bodies make this possible by being donors and setting up funds with us.

Our Values

- Making our criteria understandable and accessible whilst supporting applicants to make the best application possible.
- Being transparent about our processes and, where possible, engaging local people and the fund holders in making the final decision.
- Making grants that are relevant to local need and have a direct impact on the community.
- Supporting and encouraging groups to apply for a grant on a **Full Cost Recovery Basis –see Annex B**
- Supporting projects that help people to help themselves.
- Ensuring that all applications are treated fairly and undergo a standardised assessment process.
- Ensuring that all grants given are monitored and that successful applicants are aware of our expectations.
- Supporting applicants in line with the donor's expectations and criteria.

Who does Cambridgeshire Community Foundation award grants to?

Cambridgeshire Community Foundation awards grants to community and voluntary organisations that are charitable, educational, philanthropic or benevolent in purpose in Cambridgeshire and Peterborough. Groups do not have to be a registered charity. Many successful applications are from user-led, self-help projects that can show real community support and demonstrable benefits.

Application forms

Applications can be made online at www.cambscf.org.uk follow the links to the grant applications page and select the form appropriate to your requirements. If you do not have access to the internet, application forms can be requested by emailing a request to marion@cambscf.org.uk or by calling CCF on 01223 410535.

How much can a group apply for?

Our funds have different lower and upper limits (see "Funds Held" on our web site). Generally, we make small grants and over three quarters of the grants we have awarded to date have been for amounts up to £3,000.

What information are we looking for?

Please complete all sections of the application form. Although there are variations in the exact questions and details on the different application forms, all the forms invite you to explain the following 8 key issues

- 1. What are the aims of your project?**
- 2. What outcomes (changes) are you trying to deliver?**
- 3. What activities are you planning to deliver these changes?**
- 4. How will you measure whether the outcomes have been achieved?**
- 5. Evidence of need:** How do you know that the project is needed? What research have you done? What consultation have you undertaken? Has the project been requested by current or potential users of your group? Are there any people that are excluded from using your services at present, and if so why? Are there other groups providing a similar service, would it be possible for your organizations to work together?
- 6. Evidence of community use:** How many people currently use your services and how many are likely to use any new services?
- 7. Evidence of community involvement:** How many people are involved with the running of your organisation including people who help out with fund raising or volunteering?
- 8. Value for money:** You should ensure that your overall project budget is realistic and that costings are as accurate as possible. You should include quotes for any equipment that you are looking to purchase and for any repairs or building works that you are hoping to carry out. It is always advisable to obtain quotes from at least two independent sources.

All groups approaching CCF for funding must be 'Grant Ready'

To be Grant Ready you need to have:

A management team and a governing document: The document may be a simple set of rules, a constitution or memorandum and articles of association. Your group's management committee **MUST** have signed the document. Your committee must have at least three committee members and preferably a Chairperson, Secretary and Treasurer. You do not need to be a registered charity.

A record of income and expenditure: If you have been running for over one year we would expect to see accounts showing a breakdown of your annual income, expenditure and carry-forward balance. If you are a new group (less than 12 months old), a recent bank statement plus an annual budget/cash flow forecast showing estimated income and expenditure is acceptable. Before sending these documents ensure that they have been signed and authorised by your Treasurer.

A bank account: If you do not have a bank account (unless a specific grant scheme states otherwise) it is possible for you to nominate another organisation to receive payment on your behalf. The nominated organisation should be willing to provide confirmation that they are able to ring-fence your grant within their own accounts. The bank account, whether it is your organisations account or that of a nominated organisation must have a requirement for 2 signatures for any cheques written/payments made. We cannot write a grant cheque to an organisations bank account that is controlled by one person or to an individual's account.

Financial need: Cambridgeshire Community Foundation will not fund organisations that are holding more than one year's running costs as unrestricted reserves. If your organisation has high unrestricted reserves you should ensure that you explain what these are for and why you need a grant (and cannot pay for the project yourself out of reserves) when submitting your application.

Equal opportunities policy: Applicants must have, and be following, a written Equal Opportunities Policy.

Child/vulnerable adults protection policy (including CRB checks): If your organisation works with children, young people (under 19 years, or up to 25 years with a learning disability) or vulnerable adults, or the activity you are applying for will involve working with children, young people or vulnerable adults, you will need a Child/Vulnerable Adults Protection Policy. To be eligible for funding your organisation must also comply with the appropriate recruitment checks using the disclosure service of the Criminal Records Bureau. (The definition of a vulnerable adult is a person who is or who may be in need of community care services by reason of mental or other disability, age or illness; and who is or may be unable to take care of himself or herself, or unable to protect him or herself against significant harm or exploitation. The range of vulnerable adults can involve people with physical (including sensory loss), mental health or learning disabilities).

Details of independent referees: This should be someone who knows about your organisation, but who is not on the committee. This could be a member of the clergy, a policeman, councillor or a professional local resident who knows your group and its activities well.

Environmental policy or a willingness to create a sustainable development action plan: CCF is seeking to reduce its own impact on the environment and is keen to encourage all groups that it funds to do the same.

Guidance and help to get your group Grant Ready

Help is available to groups that are not yet "Grant Ready". Please call CCF to discuss or contact your local Council for Voluntary Service (CVS) for guidance on how to generate the necessary procedures and policies. Contact details for the CVS in the county are included at the end of these notes (annex a).

What we will not fund

Never

- Groups that have more than one year's running costs held as unrestricted reserves.
- Statutory responsibilities (i.e. projects which should be funded by a statutory body).
- Sponsored events.
- Improvements to land that is not open to the general public at convenient hours.
- Projects promoting political activities.
- Deficit or retrospective funding (i.e. grants for activities which have already taken place).
- Faith groups promoting religious, non-community based activities.

Not Normally

- Projects outside Cambridgeshire.
- National or regional charities with no independent office in Cambridgeshire.
- Animal welfare.
- General contributions to large appeals (but specific items can be funded).
- Medical research and equipment.
- Grants for more than one year.
- Projects lobbying for a particular cause or action
- School projects.
- Building or buying premises and freehold or leasehold land rights.
- Minibuses or other vehicles and overseas travel.

If your project fits into one of categories in the **Not Normally** section you should contact the office before writing your application. In exceptional circumstances, we will award grants at the request of one of our fund holders.

Assessment

When your application is received, it will be acknowledged by email, checked for completeness and allocated a Grant Panel date.

A grants assessor will contact you to discuss your project and organisation, so do not send us your application if there is no one available to contact over the next 4 weeks. Please provide us with a daytime contact number. Your assessment should take a maximum of 1/2 an hour. Please ensure that the person named on the application form knows about the project and can talk knowledgeably about it. We will also look at your accounts, your constitution and any other available literature and reserve the right to ask you to submit further information in support of your application. A short factual report on your project will be produced following the assessment and circulated to the relevant Grants Panel who will consider your request and make a decision.

Grant offers

- We aim to send all offer or refusal letters within a week of a decision being made.
- Offer letters will include any additional conditions imposed.
- Terms and conditions of the grant, if not signed as part of the application form, must be signed by someone other than the main contact on the application form (e.g. the Chair or Treasurer of your organisation) and returned to Cambridgeshire Community Foundation's office before a grant cheque will be sent out.
- You **MUST** not commit any money before you have received your offer letter and accepted the conditions.
- Should you need to request a change of use for any grant made, you **MUST** submit your request in writing to Cambridgeshire Community Foundation. Do not commit any expenditure until we have confirmed in writing to you that your request is acceptable. We attempt to be flexible but this may not be possible in all cases.
- Details of grants made will be published on our website, in our newsletter and in the local press.
- If your application is unsuccessful, we will tell you why. You can apply for a different project, but you cannot re-apply for the same project unless your rejection letter says so.

Advice for unsuccessful applicants

If you feel you have been treated unfairly (i.e. you perceive that we have failed to take account of relevant information or have based our assessment on inaccurate information), you can write to the Chief Executive of CCF who will consider your concern. You must include evidence of why you feel you have been unfairly treated. Noting that we cannot fund all the request we receive, you may be invited to reapply with a different/better application.

Why are applications rejected?

Reasons for rejection include:

- Project does not meet criteria of any funds held.
- Failure to demonstrate the group's ability to deliver a project.
- Management committee is not sufficiently representative of the community or their users.
- Failure to show sufficient community involvement.
- Failure to show sufficient need for the project.
- No indication of how the project/activity will be funded after the grant has been used.
- Not value for money (for example too few beneficiaries).
- The group applying has too high unrestricted reserves.
- Cambridgeshire Community Foundation has insufficient funds for a particular type of project or geographical area.

ANNEX A - Contact details for your local CVS:

Voluntary and Community Action East Cambs

Avril Hayter-Smith / Siobhan Branagh
41e Forehill
Ely
Cambridgeshire
CB7 4AA

01353 666166

info@vcaec.org.uk

Cambridge Council for Voluntary Service (Cambridge City and South Cambs)

Ruth McCallum – Operations Manager
Llandaff Chambers
2 Regent Street
Cambridge
CB2 1AX

01223 464696

enquiries@cambridgecvcs.org.uk

Fenland Council for Voluntary Service

Rodger Lymburn
Town Hall
Market Place
March
Cambridgeshire
PE15 9JF

01354 659772

info@fenlandcvcs.co.uk

Peterborough Council for Voluntary Service

John Cunningham
3 Lincoln Court
Lincoln Road
Peterborough
PE1 2RP

01733 342683

pcvs@pcvs.co.uk

Hunts Forum of Voluntary Organisations

Julie Farrow
The Maple Centre
6 Oak Drive
Huntingdon
Cambs
PE29 7HN

01480 420601

ANNEX B - Full Cost Recovery

All organisations in both the commercial and voluntary sector have overhead costs, associated with:

- Management and leadership
- Infrastructure and accommodation
- Finance, governance and controls, and
- Strategic development.

These overhead costs must be met in order for the organisation to survive, grow and develop. They are therefore essential to all its outputs.

Under Full Cost Recovery, organisations analyse their overhead costs and allocate them across the outputs, projects and services they deliver. If there is only one activity/ output or service all overheads costs are simply associated with this project. If there are several projects, the cost of each project should include an appropriate element of funding for overhead costs.

Full Cost Recovery is standard practice across the commercial sector, and is rapidly becoming standard practice in the third sector.

Approach

- 1) Identify projects and direct projects costs
- 2) Identify overheads
 - a. Office, overhead, premises costs *e.g.* rent, postage, telephone, heating/lighting/water
 - b. Management costs
 - c. Finance/bookkeeping
- 3) Allocate overheads to different projects on appropriate (fair and reasonable) basis
 - a. *E.g.* Premises costs might be allocated on headcount
 - b. Management costs might be allocated on time spent on each project
 - c. Finance/bookkeeping might be split equally amongst projects