



The Holywood Trust

Scottish Charity No. SC009942

Grants for Groups and Organisations

GUIDANCE NOTES FOR APPLICATIONS

The Holywood Trust's aim is to make a positive difference to the lives of young people (aged 15-25) in Dumfries and Galloway. We want to make grants to organisations that can really change things for the young people they work with.

The Holywood Trust is a charitable grant giving organisation which takes its name from the Parish of Holywood on the outskirts of Dumfries. It was founded and endowed by Sir John Keswick of Portrack and his daughter, Maggie Keswick Jencks. The Trust is administered by a board of Trustees and managed by a professional staff based at

Hestan House, Crichton Business Park, Bankend Road, Dumfries DG1 4TA.

It is important that your application conveys how the project is going to make a real difference in the lives of the young people you are working with. Applications often focus on the activities or services a grant will pay for, but are not clear about what these activities are meant to achieve for the young people, i.e. the changes within or for the young person in the short and long term.

There are no 'set' or 'correct' answers. Please give answers that you feel are realistic and right for your project and not what you think we want to hear.

If your application is successful, remember that we will ask you to report on your activities using the information provided in this application. It is essential that this information provides an accurate representation of the work of your proposal.

Please contact the Trust well in advance of your funding being required – ideally 5 or 6 months – so that we can work with you and familiarise ourselves with your work prior to your application being presented to The Holywood Trust Trustees.

www.hollywood-trust.org.uk

Terms and Conditions applying to any award made by the Holywood Trust

- If your application is successful, any offer of funding from the Trust will be restricted to the purposes agreed by the Trust and any changes to the use of the award will require the Trust's prior permission.
- The Trust will require feedback from your group or organisation if you have received funding from us. The current requirements are as follows –
 - For small awards (say, £1,000 - £2,000) for a one-off purchase or event or for small-scale ongoing work – a report will be required at the first anniversary of the funding and/or on completion of the funding objectives and should detail the extent to which these objectives have been fulfilled.
 - For larger awards towards the costs of the ongoing work of the Group or Organisation the Trustees will require regular reports – usually on a quarterly basis. In addition, an end-of-year report, which will draw together the information provided in the quarterly reports and reflect on the extent to which you have fulfilled the objectives you set out in your application, will be required.
- The Holywood Trust's support should be acknowledged in any reports, publicity or other material produced regarding the activities, services or other purposes which have been funded by the Trust.

Some general guidance regarding the completion of this form

This form has been created using Microsoft Office WORD and should be fully editable for you. Please type into the space underneath each of the section headings, for example the beginning of Page one, if giving details of the Holywood Trust it would look as follows:

ORGANISATION GRANT APPLICATION FORM

(Please read the Guidance Notes before attempting to complete this form. Please type into the space underneath each of the section headings).

1. APPLICATION SUMMARY

1.1 Organisation Name:

The Holywood Trust

1.2 Please provide a brief description of your organisation:

An endowed Charitable Trust working for the benefit of young people in Dumfries and Galloway

Double click on the check boxes to "check" them

Section One of the form is designed to provide a single page summary for the Trustees – please ensure that it remains as a single page. The other sections of the form will vary in their significance to your organisation, however we have provided some guidance on the number of pages of text we would expect for each of them. You may also want to include some graphs, tables, charts, photographs, etc. and we would welcome these additions where appropriate.

1. APPLICATION SUMMARY

This section of the form has been designed to provide the Trust with a one page summary of your organisation and your funding requirement.

1.1 Organisation Name:

Provide your organisation name in full and any abbreviation by which it is known.

1.2 Please provide a brief description of your organisation:

This should provide a reader of this application, who has no prior knowledge of your organisation, with a clear understanding of what you do.

1.3 Is your organisation...:

This section should provide details of how your organisation has been constituted and include any registration or reference numbers. (We will require a copy of your constitution or governing/founding document if we do not already have a copy).

1.4 Please give a brief description of what you require funding for.

This section should provide a clear overview of your proposal and identify any specific element of it for which you are requesting Holywood Trust funding.

1.5 How much funding do you require?

This figure should be the total cost of your proposal and should match the amount in the Summary of Funding Requirement (Section 4).

1.6 How much are you requesting from The Holywood Trust?

State the amount of funding you are requesting from the Holywood Trust. (This may be the same as above). Again, this should match the amount in the Summary of Funding Requirement (Section 4).

1.7 What other funding applications have you made or could you make?

Summarise any other applications you have made.

1.8 Is there a deadline to which you are working? If yes, please give details.

Provide date and reasons for the deadline. Examples are:
- the date by which you need to have matching funding confirmed for other applications you have made
- when you need to have funding agreed to allow the planning of an event to proceed.

1.9 When do you need this funding?

Your answer may detail the expected purchase date of services, equipment, etc. or the financial year in which it will be applied.

1.10 Have you received funding from the Holywood Trust before?

Provide details of the amount, purpose and year.

2. WHY ARE YOU APPLYING FOR FUNDING?

This section of the form has been designed to provide the Trust with a more detailed overview of your proposal and will normally cover two or three pages, excluding graphs, tables, etc.

2.1 Tell us how you propose to use the funding. If the funding is for part of the wider work of your organisation, please provide details.

We fund a wide variety of organisations. For example, you may be a national organisation detailing your local work or you may be a small community group organising sports equipment for use in your village youth club. A national organisation may require a financial contribution to regional (e.g. South of Scotland) or national (e.g. UK or Scotland) as well as local costs. Please ensure that the Trustees will have a clear understanding of what they are being asked to fund and how this would work with other funding, if there is any.

2.2 Please detail what you require funding for and when and where the funding will be used.

E.g. 1. "This will contribute to/cover the cost of badminton equipment for our youth club which we would like to purchase as soon as possible for use in the village hall on our club nights which usually take place on Tuesdays (for u/14s) and on Thursdays (for 14-16 year olds)."

E.g. 2. "We propose to make a region-wide provision of for 15-19 year olds across the region. This will be a mobile service which will be available in Langholm, Annan, Moffat, Lockerbie, Dumfries, Dalbeattie, Castle Douglas, Gatehouse-of-Fleet, Newton Stewart and Stranraer for one day per fortnight for one year during school term times. The Holywood Trust funding will be used to contribute to the costs of part-time staff..."

2.3 If this is a new activity, why have you decided to make this provision?

The Trustees will be interested to know the background to your decision to make the provision(s) detailed in this application, including any research carried out and consultation with the young people for whom the provision is being made. Whilst we will be interested to know of general measures of disadvantage, service gaps, etc., applying to a community, the Trustees will want information relating specifically to the young people who will benefit from our funding. Have you carried out an assessment of need?

2.4 How will the purposes of the funding fit with other services or organisations in Dumfries and Galloway, and beyond; what is your relationship with them?

Explain why you decided that this was the best way to address the need(s) identified. Did you consider any other ways of making a difference?

2.5 Let us know what will be achieved with this funding for the benefit of young people in Dumfries and Galloway and how this will make a difference to their lives.

Here we are looking for information that is clear, realistic and focused on changes for the better in the young people and their lives. Try to avoid vague or unrealistic statements and be as specific as you can, e.g. instead of telling us they will be happier, outline the ways in which you will see their lives improve – such as increased employability, positive relationships, health or recreational benefits.

2.6 Please list your most important objectives (up to 6).

The Trustees will be looking for some tangible benefits for young people in Dumfries and Galloway and your objectives should provide a clear link between the needs identified in this application and the outcomes for young people detailed in the next section and should identify specific services, facilities and activities.

2.7 What outcomes will be achieved?

We are looking for a measure of the specific activities, services or facilities you are going to provide for young people; the practical things you will do to achieve the difference. For example, "provide a weekly badminton session for 10 u/14s in our village", "provide a building with a 200m² activity hall with associated changing rooms and kitchen" or "500 hours of counselling to 10 young people over the coming year".

2.8 How will you monitor, measure and evaluate the difference your project is making?

Monitoring and evaluating is about measuring what you have achieved, and comparing this with what you hoped to achieve. Before you start your application, think carefully about having clear and realistic targets, then consider how you will know whether you are succeeding or not and what you need to do to collect this information: what method of record keeping will you use? Will you use questionnaires or other feedback methods with your users or other individuals/organisations involved (perhaps at the beginning and end of the project)? Will you use case studies?

In the previous section, using the example of an “activity hall”, it may be that the hall would be used by many people from your community, not just young people; in this situation the Trust would be interested in the overall numbers and the numbers of 15-25 year olds benefiting from this provision. (See also Section 3).

2.9 If you have had funding already for this or similar purposes, tell us when and who funded it originally. If it is a continuation or follow-on of current activity, please detail who has supported it and how much has been provided.

This section should provide a clear but concise overview of your previous work and how it has been funded.

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## **3. THE YOUNG PEOPLE WHO WILL BENEFIT**

This section of the form as been designed to provide the Trust with information about the young people who will benefit from any funding provided and will normally cover one or two pages.

### **3.1 Tell us about the background of the young people who would benefit from a grant from the Trust.**

Tell us about the backgrounds of the young people and circumstances affecting them. It may be that they come from a particular community in the region which has issues of poverty and social deprivation which affect them all. It could be, however, that they come from a diverse range of backgrounds but the common need for the young people derives from their shared talent in the arts, sport or similar, and that the local facilities are inadequate for their needs. Whilst the Trust is interested in helping to fill gaps in provision for all young people in Dumfries and Galloway, and to help make local provision for their personal development, it has a particular concern for those who are disadvantaged because of mental, social or physical issues.

### **3.2 Please detail the overall numbers of young people and others who would benefit from the purpose of the funding applied for and also those benefiting from your organisation’s other work, if applicable.**

Insert the number of people in each age range under each of the headings.

### **3.3 Please provide us with details of those who will be participating as leaders or facilitators.**

Let us know about any key people involved in making the provision to the young people from Dumfries and Galloway identified in this application.

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4. SUMMARY OF FUNDING REQUIREMENT

This section should provide an overview of your requirements and what you have done to meet them. It is likely that the information here will require appendices to support the figures. These could include a detailed projected income and expenditure forecast for a community project, a report from an Architect or Quantity Surveyor, or quotations from building contractors for a building project, correspondence regarding travel/accommodation costs for an expedition planned by your group, etc. The Trust provides support to many different types of groups and organisations and for a wide variety of purposes; choose headings which will provide a clear overview of your costs which will allow us to identify what funding you already have in place, have applied for, or will be applying for. If you are a national organisation please make clear whether the expense detailed is a local cost or a contribution to your regional or national costs. This section will normally cover one to two pages.

4.1 Amount of funding requested from the Holywood Trust

This should be the same amount detailed in Section 1.

4.2 Summarise your overall funding requirement

Choose a set of cost headings appropriate to your requirements. See some examples below:-

Office-based project Staff cost Rent Rates Insurance Heat and light Telephone Stationery Postage Staff travel Equipment – lease/hire/purchase Professional fees Sundries	Proposal for new building Purchase of land Building costs Professional fees
Educational Trip Travel costs Accommodation Excursion costs/Admission fees Travel Insurance	Sports development proposal Hall hire Coaching fees Travel expenses Equipment costs

4.3 Summarise any funding already in place

Source of funds - This could be your own funds from fundraising events, grants from other Trusts, contract income, etc.

Restrictions - If the use of funding is restricted to a particular purpose, note the restriction here; if there is no restriction note "none".

(Ensure that you show how you are providing for all of the costs detailed in 4.2)

4.4 What "in kind" contributions do you expect to receive?

Please identify the source, the value and the basis of calculation of the value here.

4.5 List any other funding applications for which you are awaiting a decision

Please let us have a clear overview of your other approaches for funding. We would like to know the name of the organisation(s), the amount(s) applied for and the date you expect to receive a decision from them.

4.6 Summarise any other applications made but declined; include the reasons why the application was declined, if known, and details of your funder contact person (by so doing you agree that we may contact them to discuss your application with them).

Please let us have a clear overview of your other unsuccessful approaches for funding. The Holywood Trust is often able to assist when others are unwilling, but we would like to understand their reasons for refusing support.

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## **5. WIDER IMPACT**

### **5.1 What wider impact will the Project have, e.g. socially, environmentally and economically?**

Please give some indication of the wider impact of the project socially, environmentally and economically. For example, improved behaviour of young people in your youth group may mean improved behaviour at school and better relationships at home.

### **5.2 How will you measure this wider impact?**

Please indicate how you will gather evidence of this wider impact. Do you have or will you have the means to measure this?

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6. YOUR ORGANISATION

This section will provide the Trust with a detailed picture of your organisation, its aims and how and where it operates.

6.1 What are the stated aims of your organisation?

Provide your mission statement and/or aims and objectives.

6.2 Where is your organisation based?

Please use the tick boxes to indicate whether you operate region-wide or cover one of the former districts. If none of these, please use "other" and provide further details.

6.3 Please specify the postcode area(s) of Dumfries and Galloway in which you operate.

We are mainly interested in the local base(s) for your organisation, i.e. what premises, if any, you have or use and the town(s)/village(s) in which they are located. In addition, you may want to identify where you operate, for example, you may provide outreach services, detached youth work, etc. This may be a general postcode area such as DG2 or could be DG2 9-- and DG2 0-- which designates North West Dumfries.

6.4 In what year was your organisation formed?

If your organisation has changed its constitution over time provide the key dates and the events relating to these changes.

6.5 Please provide details of your Management Committee, Trustees, Directors or similar:

Provide the name, office held (if any) and special interest represented, if any. Please use one line per person, e.g. – Joe Smith, Chair, Local Community Representative

6.6 How often does the Management Committee/Board of Trustees/Board of Directors meet?

E.g. Monthly Management Committee meeting plus an AGM.

6.7 How many staff does your organisation employ?

Detail how many full-time and how many part-time staff you have (i.e. The number of individuals rather than the full-time equivalents).

6.8 Provide details of staff and volunteers, including job titles and/or their role in your organisation.

As for 5.2 we are mainly interested in the local perspective. If you are a national organisation or similar, only provide an overview of your national organisation, e.g. "Nationally we employ 20 staff; locally we have one part-time Manager, one part-time Admin person and six volunteer Support Workers for young people.

6.9 Does your organisation have a child and/or vulnerable adult protection policy?

We expect most organisations to answer “yes” to this question.

6.10 What is the name and job title/volunteer position of the person responsible for child and/or vulnerable adult protection in your organisation?

We want to know who this person is and have their contact details should we need to contact them.

6.11 Have all staff, volunteers or others in your organisation who have direct contact with children, young people and/or vulnerable adults provided a Disclosure to enable a check of records held by the Criminal Records Bureau?

If you are unable to answer “yes” to this section we will require clarification from you.

6.12 What insurance does your organisation have? Let us know the name of your insurer, the cover provided (both type and amount).

E.g. Public and Employer Liability Insurance with Ecclesiastical Insurance up to £5million cover for each.

6.13 Let us have an overview of the people involved in your organisation.

Enter the number of people in each category. Those from an ethnic minority or those who consider themselves to have a disability will have been included in a previous column and, possibly, both of these columns (e.g. your organisation could have a 15-25 year old volunteer who is from an ethnic minority).

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## **7. ORGANISATION'S FINANCIAL INFORMATION**

These sections will normally provide an overview of your finances and how they are managed. If you are a national organisation you may want to summarise national figures and then provide an extract covering your local work. When detailing reserves, let us know whether they are unrestricted (i.e. can be used for any purpose), restricted (i.e. you have received a grant/donation for a specific purpose) or designated (i.e. your management committee or similar has set aside unrestricted funds for a particular purpose).

Also, summarise your purchase/order system, other financial controls and cheque signatory requirements in this section.

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8. CONTACT DETAILS AND OTHER INFORMATION:

Please provide both postal and e-mail addresses and the telephone numbers that we may use to contact you.

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## **9. REFEREES**

Please provide details of two people who know your organisation well in a *formal* capacity and are independent of each other (i.e. are not representatives of the same organisation, etc.)

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10. SIGN OFF and SUBMIT YOUR APPLICATION

When you have completed your application please check that all information required is enclosed - then **sign and date it but, before doing so, please ensure that all individuals mentioned in the form have been made aware of the privacy statement.** The signed copy should be posted to the Trust at **Hestan House, Crichton Business Park, Bankend Road, Dumfries DG1 4TA** and a copy of the Word Document should be attached to an e-mail and sent to **funds@hollywood-trust.org.uk**.