

2022 Wellbeing Round - First time applicant

Registration

Thank you for applying to the Community Foundation for Surrey.

Before you start your application, please read our guidance notes <https://www.cfsurrey.org.uk/guidance/> and tick the box below to confirm the following;

- You are a not for profit, voluntary or community group (you don't need to be a registered charity, but your activities must be charitable). Guidance can be found on the Charity Commission website <https://www.gov.uk/government/publications/charitable-purposes/charitable-purposes>
- Your activities are for the benefit of residents of Surrey.

AND

- You have a governing document (Constitution, Articles or equivalent) that shows how your group is run and managed.
- You have a management committee (the people who are responsible and make decisions) of a minimum of three unrelated people
- You have a bank account in the name of your group which requires two signatories / dual authorisation.
- You have a Financial Policy (a document which lays out how you manage money and payments)
- You have a Safeguarding Policy and Procedure for children, young people, or vulnerable adults (as applicable). The document should note the Designated Safeguarding Lead, contact details and referring agencies.

OR

If you are a new or un-constituted group, you have written agreement from another group that they will act as a fund holder for the grant. In this situation we will need to see the supporting documents for the fund holder.

In order to process your application, we need to record your details on our database. We promise to treat your data with respect; we will never sell it and we will store it securely. To read our full privacy policy, please [click here](#).

If you are unsure about any of the above text or have any other queries, then please contact the grants team via e-mail grants@cfsurrey.org.uk

I agree that I have read and understood the above

Enter email address

Please enter your email address

Section 1 - About your organisation

Advice

Please refer to the 'info icons' for guidance on how to answer particular questions.

Organisation name and address details

Name of your organisation



Address of your organisation

Street

Town/City

County

Postcode

Website

Facebook

Twitter

Telephone



General/Office email



Main contact person

These are the details that will be used for correspondence purposes for this grant application and any subsequent end of grant reporting.

Title

Forename(s)

Surname



Job title

Work/Office phone

Home phone

Mobile phone

Email

Use organisation's address for correspondence

Organisation start date

Month

Year

What type of organisation are you?

Select as many as appropriate. Please use the pop-up box to record your charity/company number

- Registered charity
- Company limited by guarantee
- Unincorporated club or association
- Community Interest Company
- Charitable Incorporated Organisation

Other

Banking

If your application is successful, your grant will be paid by BACS. Please provide the details of your account and attach a recent (within 3 months) copy of a statement in the attachments section of the application form.

Bank name

Bank sort code

Bank account name

Bank account number

Income over last accounting year

What are your current unrestricted reserves?



Are you seeking other funding for this project?

Please give details of the funding raised so far

Are you part of a larger regional or national organisation?

Yes

Staffing and volunteers

How many of each of the following are involved in the organisation?

Full time staff / workers

Part time staff / workers

Management committee

Volunteers (excluding management committee)

Please describe the overall aims and objectives of your organisation and the activities or services your organisation provides.



0 word of 1000

Please tell us about any local networks you are involved in or partners you work with. Tell us how your work fits in with other charities and providers addressing this problem.



0 word of 1000

Section 2 - About your grant application

Project details

Please refer to the "info icons" for guidance on how to answer particular questions.

Project name



Project / funding start date



Project / funding end date

Which area (estate, town, village borough) do most of the people who benefit come from



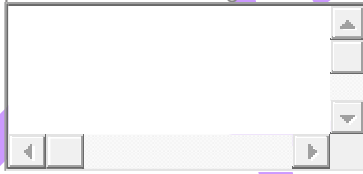
Which local authority will the activity primarily take place in?



Please provide a postcode which represents the geographical area you will benefit. This information is used to track the reach of our grant making across the country. It is part of the grants data which is published on <https://www.threesixtygiving.org/>

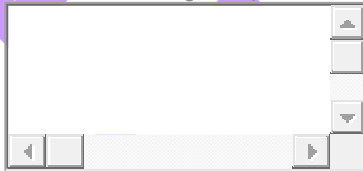


The "Problem" - What problems do the people you work with face? Are the people you are supporting facing particular disadvantage and/or needs?



0 word of 500

Project Description - Please tell us about the work you would like funding for. In simple terms, describe what you will do. Answering the questions "where, when, what, how, who and why?" may help structure your answer.



0 word of 500

The change you want to make - How does this project/work help to solve the problem? How will the lives of people be better? Is there a benefit to the wider community?



0 word of 500

Outcomes and Impact - How will you measure and report on the positive changes made for people?

0 word of 500

To help us understand the difference this work will make please tell us how the organisation has helped an individual in the past and the change made to their life. These stories of change can be very compelling for donors.

0 word of 500

Please tell us about any local networks you are involved in or partners you work with. Tell us how your work fits in with other charities and providers addressing this problem.

0 word of 500

If the questions above have not provided you with the opportunity to tell us what is important to you, please use this field to provide any extra information.

0 word of 500

Equity, Diversity, and Inclusion

It is important to us that funded services can be accessed by all people, whoever they are.

Please tell us how you ensure that vulnerable and marginalised people are able to access your support. How are people involved in the design of your projects and the leadership of your organisation?

0 word of 1000

Section 3 - Impact

Outcomes and Indicators

To help evaluate the difference your work is making we ask that you select Outcomes and Indicators from the drop downs box below - these will help measure the impact of your work. Four options are listed but you are only required to select one - please use more if they are meaningful for your project.

Indicators will then display based on the Outcome selected. Please only chose Indicators which are meaningful for your work - you do not need to select all of the boxes.

Please add a predicted number of beneficiaries for each Indicator in the box(es) provided. We appreciate it can be challenging to predict numbers; please provide your best realistic estimate.

Select the primary outcome for your project or activity

Select the second outcome for your project or activity

Select the third outcome for your project or activity

Select the fourth outcome for your project or activity

Primary beneficiary

How many people will benefit from this funding?



Primary beneficiary

Other beneficiary

Primary issue

Primary issue

Other issue

Primary age group

Primary age group



Other age group

Section 4 - Project budget and consent

Project budget

Please provide a budget for your work - we are a full cost recovery funder so please include relevant overheads for project applications. If you are applying for core costs, please provide an overview of your organisation's budget.

What is the total cost of the project?



How much has been raised so far?



How much money are you applying to us for?



Staff costs

Requested amount

Total cost

Breakdown

		▲
		■
		▼
◀	▶	

0 word of 1000

Volunteer costs

Requested amount

Total cost

Breakdown

		▲
		■
		▼
◀	▶	

0 word of 1000

Activity costs

Requested amount

Total cost

Breakdown

		▲
		■
		▼
◀	▶	

0 word of 1000

Office, overhead, premises costs

Requested amount

Total cost

Breakdown

		▲
		■
		▼
◀	▶	

0 word of 1000

Capital costs (equipment)

Requested amount

Total cost

Breakdown

0 word of 1000

Publicity costs

Requested amount

Total cost

Breakdown

0 word of 1000

Other costs

Requested amount

Total cost

Breakdown

0 word of 1000

Referee

For first time applicants we request that you provide an independent referee who knows your work and will be willing to discuss it with your assessor.

Referee forename

Referee surname

Referee company name

Referee position

Referee email

Referee phone

Supporting documents

Please submit an up-to-date copy of each of the supporting documents using the "Attachments" button below

- Governing document
- Financial policy
- Safeguarding policy and procedures
- Most recent Report and Accounts (if available on the charity commission website you do not need to submit)
- A recent bank statement no older than 3 months old - transactions may be redacted for privacy
- Quote - if applying for building works or any capital costs above £5,000
- Management accounts showing your current financial position

If you cannot submit them online, please email them to grants@cfsurrey.org.uk. Please check the box below if the documents will follow by email.
Documents to follow by email

Yes

[Add document](#)

Declaration

Declaration

- I am authorised to make this application on behalf of the above organisation, and I certify that the information contained in this application is correct.
- I certify that the documents submitted to support this application are the full and current documents and they accurately represent my organisation's current financial position, policies, and governance.

Conditions of Grant Award

By submitting an application to the Community Foundation for Surrey, the organisation named in the application (referred to as "you" in these Terms and Conditions) agrees, if awarded a grant, that:

- Any grant is awarded on the basis of the information supplied in this application.
- Any and all monies awarded must be used for exclusively charitable purposes as defined on the Charity Commission website <https://www.gov.uk/government/publications/charitable-purposes/charitable-purposes>.
- The award is intended only to fund the work specified in your request and only for expenditure incurred after the date of your grant award.
- The award will be recorded as Restricted income in your accounts unless you are specifically notified that the grant is unrestricted.
- You will act lawfully in carrying out your project in accordance with best practice and guidance from your regulators, and follow any guidelines issued by us about the project or use of the grant and let us know promptly about any fraud, other impropriety, mismanagement, or misuse in relation to the grant.
- You will inform us of any Serious Incident as defined by the Charity Commission <https://www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity>
- If the project/activity changes in any way from the original application, the Community Foundation for Surrey must be notified immediately. Significant variations may result in the grant being altered or withdrawn.
- If you have been unable to start using the grant within three months of receipt, or it cannot be used for the purpose for which it was awarded you must contact the Foundation as soon as possible.
- You will immediately return any part of the grant that is not used for your project, or which constitutes an unlawful subsidy.
- You will keep accurate and comprehensive records about your project during the project and for five years afterwards and provide us on request with copies of those records and evidence of expenditure of the grant, such as original paper or electronic receipts, invoices, and bank statements.
- An End of Grant report will be completed and returned to the Community Foundation for Surrey within 3 months of completion.
- You will acknowledge Community Foundation for Surrey funding using our logo in accordance with the relevant guidelines for recognising your grant, which can be found on our website <https://www.cfsurrey.org.uk/apply-for-funding-3/publicising-your-grant>.

- Public information about any grant awarded may be shared in open datasets. No personally identifying information will be published.

Application and grant awards are made electronically, the agreement between us shall be deemed to be in writing and your online acceptance of these Terms and Conditions shall be deemed to be the equivalent of your signature on that agreement.

Failure to comply with any of the above conditions will impact on future applications for funding and in serious cases may result in grant monies being reclaimed.

Declaration name

Declaration position

Publicity and feedback

We would like to follow up on successful applicants and potentially feature them in publicity activities. Please tick this box to confirm that, if your application is successful, you are willing to take part in publicity activities where appropriate.

Yes

How did you find the application form?

This is a new form, and we would appreciate your feedback on your experience of completing it.



0 word of 1000

Submit Confirmation

Thank you for your application to the Wellbeing Round! You will shortly receive a copy of your completed form via email. Please ensure you keep this for future reference.

What happens next...?

As you know, the Wellbeing Round closes for applications at 9am on Monday 25th July. We will then begin due diligence checks and assessment in the weeks following. We may be in contact if we have any questions. Once due diligence checks have been successfully completed, our Grants Managers might be in touch to speak with you about your application. This is an opportunity to have a conversation and discuss key points. The Grants Managers are keen to be able to understand the needs and proposals, and advocate on your behalf.

Once the completed assessments are ready, we will share your application with Donor Funds whose criteria for funding matches the details of your request. With over 85 Funds, and usually over 100 applications, this process can take a little time as we help match the applications with Donors and allocate funding in the best way possible.

We will have funding outcomes available at the beginning of November 2022. Please note, we are unable to fund retrospectively.

To help us with this process, please ensure you have submitted the required supporting documents to us by emailing them to us grants@cfsurey.org.uk.