

# Guidance notes - Applications

## Section 1 - Contact details

### Organisation name

This is the name of your group as set out in your governing documents. If your group is better known by another name, please provide this information as well.

### Address

This is the address we will send any documents to, so please ensure it is an address where mail can be delivered and picked up. If the project operates in a different area to the contact address provided please make this clear in the application.

### Email address

We will generally use email to contact you wherever possible so it is important to provide a valid email address which is checked regularly. Please note the outcome of your grant application will be via a written letter through the post.

### Contact numbers

The contact telephone number should be for someone who can be contacted and has a good knowledge of the organisation and application. If that person is only available at certain times or days of the week please include this in your application form as we may contact you to ask questions in support of your application as part of our assessment process.



## Section 2 - About your organisation

### Size of your organisation

Provide a brief overview of what your charity, group or organisation does, its vision and aims. There are no quantifiable limits to the size of organisations eligible for many of our grant programmes (please refer to the specific criteria). However, we are unlikely to fund organisations which are not locally based to the proposed project, organisations which have large income levels and/or organisations which have many members of staff.

## Section 3 – Your organisation's finances

### Total income in the last financial year

This is the income received by your organisation in your most recent completed financial year. Sources of income for community groups can include memberships, subscriptions, grants and trading.

### Total amount spent in the last financial year

This is the total expenditure of your organisation in the last completed financial year.

### Current unrestricted reserves

This is the money held by the organisation which has not been designated for a specific purpose. e.g. donations to charitable organisations are usually unrestricted as opposed to grants which are usually restricted for a specific purpose. It is very rare that any group will have no unrestricted reserves.

## Section 4 - About the Project

### Project objective

This section should give clear details of the project or activity you are requesting funding for, rather than your whole organisation.

### Timescales of the project

No retrospective projects can be funded by any of our grant programmes, therefore please ensure your project is due to begin after the programme's closing date. Grant applicants will usually have the outcome on their application approximately two months after the closing date (please refer to the specific grant criteria for any alterations to this).

### Cost breakdown

Items should be broken down into the different elements. By providing us with your cost breakdown it helps us to see that the project you're requesting funding for has been planned and all costs taken into consideration. Quotes should be obtained from suppliers where available.

## Section 5 – Referee

This should be someone who is independent from the running of your organisation but also has a good knowledge of how the organisation benefits the local community.

Examples of a good referee include an employee of a partner organisation, the local head teacher, local councillor or the local police community support officer.

## Supporting Documents

Grant applicants must submit the following documents as detailed in the application form's checklist as part of their application.

### 1. The organisation's constitution (signed and dated)

Every group must have a governing document in order to be eligible for a grant from Community Foundation Wales. This could be your Memorandum and Articles of Association, Terms of Reference or Constitution. This document should outline the aims and objectives of the group, detail the procedures of the executive committee meetings, financial procedures and will also include a dissolution clause which details what would happen to the group's assets should the committee decide to disband. Electronic copies of lengthy governing documents are accepted; let us know that you have sent this electronically in your hard copy application. If you have no governing document please contact your local County Voluntary Council who will be able to assist you.

### 2. Financial documents

Ideally we requires two years of accounts in order for us to carry out financial checks. Where audited accounts are not available we can accept an income and expenditure log. Please note a monthly bank statement does not hold sufficient information as a financial document for our assessment process and will therefore not be accepted. If your organisation is newly constituted we will require the financial information covering the period since your group was established.

### 3. Hard copy of the application

We encourage electronic submissions of the applications wherever possible. We do also require a hard copy of the signed application form, with the accompanying supporting documents. Remember to provide correct postage as we are unable to cover any postage costs for items which are not successfully delivered.