How to: complete our application form for organisations

Most of our applications follow the same format and include the questions outlined in this document. Some funds will have additional questions, or the questions might differ slightly. We would recommend starting an online form and completing page one first and saving your progress as you go.

Choose your preferred language

You will get to choose to complete the form in English and Welsh at the beginning of the application form:

Community Foundation Wales
Sefydliad Cymunedol Cymru

☐ Save my progress and resume later | Resume a previously saved form

Please select which language you want to complete this application form in?

Dewiswch ym mha iaith rydych chi am lenwi'r ffurflen gais hon?

*

○ Cymraeg / Welsh

○ English / Saesneg

Saving progress option

You'll also notice that you have an option to 'Save my progress and resume later' at the top of every page of the form.

Resume Later

In order to be able to resume this form later, please enter your email and choose a password.

Your Email: _____

A Password: _____

Confirm Password: _____

Password must contain the following:

- 12 Characters
- 1 Uppercase letter
- 1 Lowercase letter
- 1 Number
- 1 Special character

[Save]

If you don't want to complete the whole form in one session, please tick this box and the system will ask you to set a password. We recommend that you save the form regularly as you never know when your internet or electric gets cut off unexpectedly. We aren't able to retrieve information that isn't saved. You can resume this form at any time. Make sure you can remember the email and password you just provided. You will need them to resume your form.

! **IMPORTANT:** Your submission is considered incomplete until you resume it and press the submit button

First page

The application will start by asking questions about your organisation, including address and primary contact details, social media tags and website address, type of organisation and registration number if relevant, staffing numbers, income/expenditure and reserves within the last accounting period and a narrative of the aims and objectives of the organisation.

The Organisation

Name of the organisation *

House Number/Name and Street *

Town/City *

County *

Please select...

Postcode *

General Telephone Number *

General Email Address *

Website. Please include **https://www.** at the beginning of your website address.

Social Media

X (formerly Twitter)　　Facebook　　Instagram

LinkedIn　　TikTok

Other details

Date Established

Other details

Date Established

[   ]

What type of organisation are you? *

☐ Constituted Community Group

☐ Registered Charity

☐ Charitable Incorporated Organisation

☐ Company Limited by Guarantee

☐ Community Interest Company

☐ Unincorporated Club or Association

☐ Other

Are you part of a larger regional or national organisation?

○ Yes

○ No

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

In this section you can write 200 words.

In the last accounting year

Income *	Expenditure *	Unrestricted Reserves *
[ ]	[ ]	[ ]

Staffing and Volunteers

Full time staff / workers *	Part time staff / workers *
[ ]	[ ]

Trustees / Management Committee *

[   ]

Volunteers (excluding Managament Committee) *

[   ]

Percentage of staff and volunteers that are Welsh speakers. Please input a number between 0-100, do not include the % symbol. *

[   ]

Does your organisation pay the Living Wage to their employees?

[Please select...   ▼]

If you aren't already, we encourage you to become accredited as a Living Wage Employer with the Living Wage Foundation: www.livingwage.org.uk/employers

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Second page

You will need to provide details about your organisation's safeguarding policy and practice:

Safeguarding

Does your organisation have a Safeguarding Policy in its own name? *

Please select... ⌄

Please provide the name of your organisation's Safeguarding Officer. *

What is their position within the organisation? *

How often do you review your Safeguarding Policy? *

When was your Safeguarding Policy last reviewed? *

Do you provide training on your Safeguarding Policy to your Staff, Trustees, and Volunteers?

Please select... ⌄

Please describe the process you would follow if an allegation of abuse was made against a member of your team. This could include yourself, a fellow staff member, a volunteer, or a trustee. Consider who you would need to inform, how you would record the incident including the outcome, and how you might undertake a review of the incident to inform future practice. *

In this section you can write 500 words.

We will be undertaking spot checks during our grantmaking processes, and therefore reserve the right to request a copy of your Safeguarding Policy at any time.

If the project you are applying for is working with children, young people, and/or vulnerable adults on a 1:1 basis, we **WILL** request a copy of your Safeguarding Policy as part of our assessment process.

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Third page

Please select if your application is for project or core costs. Please note that we will consider a contribution towards core if you're applying for project costs.

We consider 'Core Costs' to be an organisation's operating costs, essential to keeping an organisation running from day-to-day. They are not related to delivering specific or distinct projects.

These might include for example:

- General office expenses, such as rent, utilities, insurance etc.
- Governance and compliance costs such as accountancy and audit, mandatory training, memberships etc.
- Management, HR and payroll costs.
- Costs related to marketing and communications.
- Monitoring, evaluation and learning.

Application Type *

Please select...

Application Name

This should be either the project name or 'Core Costs' *

Duration *

Please select...

Start Date *

Please give a brief summary of your application / project

We're looking for a couple of sentences that describe:
- who you are working with (e.g. young carers),
- where you are based (e.g. Treforest),
- what you will be doing (e.g. weekly activities), and
- how those you will work with will benefit (e.g. be able to relax and have fun/make new friends, share experiences and support each other/take a break from their caring role).

For example, Kids Club supports young carers in Treforest. It will provide weekly activities to enable young people to relax and have fun in a safe and comfortable environment. These activities allow them to make new friends, share experiences, support each other, and take a break from their caring role.

*

In this section you can write 250 words.

What opportunities have you identified to improve the service you offer to your beneficiaries?

Considering the funding focus within the Grant Criteria, we're interested to hear about:
- How you have engaged your beneficiaries?
- How you work with other groups and agencies to provide a network of support?
- What are your particular strengths?
- How you use your strengths to add value to the work of others?

We're keen to see that organisations are not working in isolation, but instead building on and into a network of support to provide a more holistic approach and good partnership working.
*

In this section you can write 500 words.

What positive changes do you expect your project to bring to individuals, groups and the wider communities that you work with?

Consider the people you are directly working with, their families and friends as well as the wider community in which they live Eg. Reduced isolation / increased community engagement / improved understanding etc. How will you know these changes have taken place?

If you are able to provide a case study here to tell the story of an individual, family or group you have worked with that would be really helpful. We are always looking for stories that show the impact of funding. We may wish to feature your story and will be in touch for photos, quotes, press releases etc if needed. We will of course respect the privacy of anyone featured. *

In this section you can write 500 words.

We're interested in how groups consider the long-term effects of their work and its collaboration with others. The Well-being of Future Generations (Wales) Act focuses on enhancing the well-being of Wales across social, economic, environmental, and cultural aspects. It recommends organisations to think long-term, improving cooperation with people, communities, and peers, to tackle persistent issues like poverty, health disparities, and climate change. We are keen to encourage organisations to not only consider their local community but also how their work aligns with the efforts of other groups, both voluntary and statutory.

Please explain how your organisation is planning for the future as well as for the present.

Things to think about here could include:

- What are the key issues facing your community currently?
- How will you know your work is effective in addressing these issues?
- Are there any external challenges or opportunities that will impact your work?
- Do you think your organisation would benefit from working in partnership? If so, who would you be keen to work with and why?
*

In this section you can write 500 words.

How many volunteers will you work with? Please input a number. *

How many beneficiaries will you work with? Please input a number. *

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Fourth page

Budget

Before completing this section, **please read the grant criteria** to ensure you are not applying for more funding than we can award through this grant.

Requested Amount: How much you are applying to Community Foundation Wales for.

Total Costs: The total cost to deliver the project, as you may have secured, or be in the process of securing, funding from other sources.

Please enter the figures without commas, semi-colons or spaces e.g. 2000

Year 1 - Requested Amount *   Total Costs for first year *
£   £

0   0

Total Requested Amount *   Total Project Cost *
£   £

0   0

This grant will be   [   ]   % of the total costs

If applicable, please detail how you will secure the remaining costs.

If this grant does not cover 100% of the total costs, please provide a breakdown of where you'll secure the balance. Has this been secured, or if not, when are you likely to find out the outcome?

In this section you can write 300 words.

What costs do you expect Community Foundation Wales to cover?

Please give a breakdown of what you will spend the grant on.

For example, for core costs you could provide a breakdown of costs for positions, salaries, associated oncosts, and/or utility bills.

For project costs, you could provide a list and associated costs for positions, salaries, events, workshops, 1:1 support, etc.
*

In this section you can write 500 words.

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Fifth page

Outcomes

Please tell us the difference this grant will make. Please select **at least one** outcome for your application.

Outcomes are the change that results from the project/organisational work. The outcomes should contribute to the aim of the project/organisation.

Outcome 1 *

Please select... ⌄

Outcome 2

Please select... ⌄

Outcome 3

Please select... ⌄

Outcome 4

Please select... ⌄

Primary Beneficiaries

From the questions below, please choose the category that fits the majority of the beneficiaries of this grant.

Primary Theme *

Please select... ⌄

Primary Issue

Please select... ⌄

Primary Beneficiary *

Please select... ⌄

Primary Gender *

Please select... ⌄

Activities

Please tell us what type(s) of activities will be carried out with this grant. If you are applying for core costs please choose activities that form the majority of your work detailed in your application.

If you are delivering multiple activities please click on 'Add another activity' to add more than one type.

Target Number: This is the number of beneficiaries you hope to support. We understand at this stage the number may be an estimate and it may change as you deliver your project/service.

Activity *

Please select... ⌄

Target Number

Add another activity

Age Group

Please tell us the age range of the individuals that will benefit from this grant.

If you are delivering to multiple ages please click on 'Add another primary age' to add more than one range.

Target Number: This is the number of beneficiaries you hope to support. We understand at this stage the number may be an estimate and it may change as you deliver your project/service.

Primary Age Group *

Please select...

Target Number

Add another primary age

Ethnicity

Please select which ethnicity group your beneficiaries are from.

If you are delivering to multiple ethnicities please click on 'Add another primary ethnicity' to add more than one range.

Target Number: This is the number of beneficiaries you hope to support. We understand at this stage the number may be an estimate and it may change as you deliver your project/service.

Primary Ethnicity Group *

Please select...

Primary Sub Ethnicity Group *

Please select...

Target Number

Add another primary ethnicity

Local Authority

Please confirm which Local Authority you will work in. If you are delivering in multiple Local Authorities please click on 'Add another local authority' to add more than one area.

Target Number: This is the number of beneficiaries you hope to support. We understand at this stage the number may be an estimate and it may change as you deliver your project/service.

Local Authority Name *

Please select...

Target Number

Add another local authority

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Sixth page

You will need to upload 2 key documents including:

- The organisations governing document (if you're unsure what document you need to upload here, click here).

- The organisation latest set of financial accounts or Income and Expenditure Sheet for the last year.

Supporting Documents/Dogfennau Ategol

As a funder, we have a responsibility to make sure the organisations we fund are robust and well structured. However, we recognise that this can be confusing for voluntary organisations if they are new to the sector or are not aware of the various standards required in the charitable sector.

Our Grants Toolkit includes guidance in this area which includes an explanation of different organisation structures and which governing document we need to see from each and guidance on policies and best practice - click here to read more.

We need the following documents to process your application

Fel cyllidwr, mae gennym gyfrifoldeb i sicrhau bod y sefydliadau rydym yn eu hariannu yn gadarn ac wedi'u strwythuro'n dda. Fodd bynnag, rydym yn cydnabod y gall hyn fod yn ddryslyd i sefydliadau gwirfoddol os ydynt yn newydd i'r sector neu os nad ydynt yn ymwybodol o'r safonau amrywiol sy'n ofynnol yn y sector elusennol.

Mae ein Pecyn Cymorth Grantiau yn cynnwys canllawiau yn y maes hwn sy'n cynnwys esboniad o wahanol strwythurau sefydliadol a pha ddogfen lywodraethol y mae angen ei yrru i ni a chanllawiau ar bolisïau ac arfer gorau - cliciwch yma i ddarllen mwy.

Mae angen y dogfennau canlynol arnom i brosesu eich cais

Dogfennau Llywodraethol
Governing Documents *
[Choose File] No file chosen

Cyfrifon ar gyfer y flwyddyn ddiwethaf
Accounts for the last year *
[Choose File] No file chosen

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Seventh page

The seventh page will then ask for the contact details of the person completing the form, who will then become the primary contact for when we're processing the application.

Main Contact Person

Title
[Please ▾]

First Name *
[   ]

Surname *
[   ]

Role at organisation *
[   ]

Email *
[   ]

Telephone (Daytime) *
[   ]

Telephone (Mobile) *
[   ]

Does the main contact have any additional communication needs? Please describe, for example, if they need information in a specific language or format. *
[   ]

What language should we use to contact the main contact? *
[Please select... ▾]

You will also need to sign up to the following declaration -

Declaration

Please can you confirm the following:

- I am authorised to make the application on behalf of the above organisation (I am a member of the management committee or a senior staff member).
- I certify that the information contained in this application is correct to the best of my knowledge.
- If the information in the application changes in any way I will inform Community Foundation Wales immediately.
- I give permission for Community Foundation Wales to record the information in this form electronically and to contact my organisation by phone, mail or email with information about its activities and about future funding opportunities.
- I am aware that if I do not include the supporting documents listed within the required time frame (e.g. annual accounts for the last financial year and your organisation's governing documents), my application will be ineligible.
- The organisation has a Safeguarding Policy that is regularly reviewed and updated.

I agree and have read and understood the above *

☐

I give permission for Community Foundation Wales to use details from this application for marketing purposes should a grant be approved by the panel *

☐

Feedback

Ar ôl cwblhau'r datganiad, mae cyfle i roi adborth ar eich profiad gyda'n proses ymgeisio.

Feedback

We value your experience and your voice matters. Your input is crucial in shaping our services and ensuring a better application process for everyone.

How easy was it to complete the application form?

○ 1   ○ 2   ○ 3   ○ 4   ○ 5

Were the questions easy to understand?

○ 1   ○ 2   ○ 3   ○ 4   ○ 5

How useful did you find the Grant Criteria documentation?

○ 1   ○ 2   ○ 3   ○ 4   ○ 5

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Cyflwyno'r ffurflen

When you're happy with the answers given to the questions asked, you will need to click on

Review Application

This is your opportunity to read over the application one last time before clicking submit. Then click the Submit button once you're happy.

Please sign here

_____

Reset Signature

☐ or type your name to sign

Your Name: * [   ]

Your Initials: * [   ]

Your Email Address: * [   ]

✉ **Incomplete Response**

Please click the link in the verification email to complete your signature.

Submit Signed Response   ✏ Make a correction

You'll need to follow the steps to electronically sign the form and you'll get a follow up email to confirm receipt and to verify the electronic signature given.

! IMPORTANT – you need to click on the submit button at the end of the form for it to be considered by the panel. We don't receive the form if you've only saved it on the system

Changes After Submission

If anything changes in the project details after you've submitted the form, then please send us an update to grants@communityfoundationwales.org.uk. Please include the application reference (beginning with FR-00) in your email to enable us to find your application on our system.

For example, if another funder has agreed to support some of the costs and you need to reduce the amount you need from us.

Available support

The Grants Team at Community Foundation Wales is here to support you in submitting an application. We aren't able to read over draft applications before you submit but you can schedule a call or email grants@communityfoundationwales.org.uk if you're unsure if you're eligible for the fund or you're unsure what to include in the answers to any of the above questions.