



# The Clare Milne Trust

Transforming Lives in the South West

## GRANT APPLICATION FORM

Please include a covering letter with the application. Please ensure that other than contact details for the organisation, the grant application form is anonymised, i.e., no personal information about third parties is provided by way of example.

The Clare Milne Trust (the Trust) will carry out due diligence checks on applications which meet our funding criteria as part of the final decision-making process.

The Trust may carry out best practice checks on applicant organisations' accounts, governance or safeguarding arrangements. The Trust will also carry out checks against publicly available information e.g. on the Charity Commission website and at Companies House.

All supporting documents must be supplied with the application form. The Trust may request further information.

### About Your Organisation

Date of application:	
Name of organisation:	
Please state if affiliated to or part of a larger organisation or charity:	
Legal status of organisation:	
Charity No/ CIC No /Company No or other:	
Full postal address:	
Postcode:	
Main contact person for this application and position in organisation:	
Telephone:	
Email:	
Website details:	
Does the organisation have a UK bank account in the name of the organisation with at least two unrelated signatories?	
Does the organisation's management committee, board of trustees or board of directors contain at least three unrelated people as members?	

Is the organisation inspected by an outside agency, such as Ofsted or the CQC? Please state details of the outside agency.	
What was the date of the last inspection by this agency and the outcome?	
Is the organisation currently subject to any pending regulatory investigation or enquiry?  If yes, please provide additional information.	
Please describe the main activities of the organisation.	
In which year did the organisation start?	
How is the organisation funded?	
Does the organisation comply with the Charity Governance Code and the Code of Fundraising Practice?	
How many volunteers are involved in the organisation?	
How many full-time staff does the organisation employ?	
How many part-time staff does the organisation employ?	

<b>Safeguarding</b>	
Does the organisation have a Safeguarding Policy and/or policies for the protection of children and/or adults at risk?	
<p>All safeguarding policies should be compliant with Charity Commission guidance and demonstrate that reasonable steps are being taken to protect people who come into contact with the organisation from harm.</p> <p>Safeguarding policies are expected to include:</p> <ul style="list-style-type: none"> <li>• Definitions of safeguarding</li> <li>• Types and signs of abuse and harm</li> <li>• Clear procedures for reporting safeguarding</li> <li>• The name and contact details for the person/persons responsible for safeguarding</li> <li>• Details of local safeguarding partners</li> <li>• Procedures for undertaking appropriate checks on staff, volunteers and trustees to ensure their suitability, including, but not limited to, procedures for ensuring appropriate DBS checks are undertaken.</li> </ul> <p>Please note that the Trust may request a copy of the organisation's Safeguarding Policy and reserves the right to ask further questions regarding the safeguarding arrangements in place if it considers this necessary.</p>	
<b>Safeguarding Declaration</b>	
<p>Please confirm that the management committee, board of trustees, or board of directors are satisfied that:</p> <ul style="list-style-type: none"> <li>• The organisation's Safeguarding Policy includes the protection from harm of all those who come into contact with the organisation as well as protecting children and adults at risk from harm;</li> <li>• All safeguarding policies and procedures in place are up to date and appropriate for the activities of the organisation;</li> <li>• The organisation undertakes appropriate checks on staff, volunteers and trustees and meets all statutory requirements for carrying out DBS checks;</li> <li>• All staff, volunteers and trustees have undertaken appropriate safeguarding training, including regular refresher training;</li> <li>• The organisation's safeguarding arrangements are reviewed at least once annually by the board.</li> </ul>	
Please confirm that the person signing this form has the authority of the management committee, board of trustees or directors to make the safeguarding declaration.	

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**Funding Request**

Please give a short summary of the project for which the organisation is seeking funding.  
(Detailed information may be included on a separate sheet, if applicable –no more than 2 sheets of A4).

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What is the total funding required for this project?	
What funding is requested from the Clare Milne Trust?	
What funding is sought from others? Please provide details on a separate sheet, if applicable.	
How much does your organisation have available in reserve funds?	
How much has the organisation raised so far?	
How many people with a disability would benefit from the funds in total?	
How many people with a disability might benefit each week from the organisation's activities?	
Please state the expected age range of people that will benefit from the funds.	
How many weeks of the year does the organisation operate?	

Please state where the organisation expects the beneficiaries to be located. If not in Devon or Cornwall, please state how the project will benefit people in the South West.	
Please provide a budget or costings for the project.	
If the project is for building works, have all necessary planning consents been obtained?	
If full funding is not received, can the project be scaled down? If so, in what way?	
Where appropriate describe how the ongoing running costs will be met once the project is complete.	
<b>Finance</b>	
Date of latest accounts.	
Please explain any qualified audit or independent examiners report.	
Is filing up to date? If not please explain why.	
According to the latest accounts:  What are the net assets of the organisation? Is this a fair reflection of the assets at market value? If not, please explain why this is not a fair reflection of the assets.	
How much of the organisation's assets are as follows:  Liquid or in a readily accessible form? Buildings wholly or largely occupied by the organisation? Other long-term assets?	
To what extent is the organisation committed to future expenditure? Is it anticipated that this can be met from income or will it be necessary to realise assets or take other action, for example borrow additional funds?	
What was the organisation's total income for the financial year according to the last accounts? Please explain, if applicable, any variation in financial performance year on year.	

<p>Please indicate the amount received in the financial year from:</p> <p>Total donations, legacies, and grants.</p> <p>Investments.</p> <p>Fees charged.</p> <p>Other sources.</p>	
<p>What was the organisation's total expenditure for the financial year according to the last accounts?</p> <p>Please submit a budget for the project. If available, please supply a cashflow forecast.</p>	
<p>Please indicate the organisation's expenditure in the financial year on:</p> <p>Fundraising, to include marketing budget, salaries and other expenses <u>directly</u> related to fundraising.</p> <p>Other salaries (unless included in fundraising above). Please provide a breakdown of salaries. <b>Please ensure that information is anonymised and is compliant with data protection regulations.</b></p> <p>Other administration, to include expenditure on investment management.</p>	
<p>Does the organisation expect its' income and expenditure to remain at a broadly similar level during the current year?</p> <p>If not, please explain why the organisations' income level is expected to change?</p> <p>Are there any other material changes to the current scope of operations expected during the life of the project?</p>	

Please sign and date the following declaration.

**To the best of my knowledge, all information that I have provided in this application is correct.**

**I agree that should any of the information provided within this application change prior to or, if successful, during the delivery of the project for which funding is awarded, I will update the Trust as soon as reasonably practicable. This includes if the organisation becomes subject to any regulatory investigation or enquiry.**

**I confirm that I have the authority of the board of the management committee/trustees/directors (please delete as applicable) to submit this application, and to sign the safeguarding declaration.**

Signature:

Print name:

Position in the organisation:

Date:

#### **National Charity**

If the organisation is a National Charity please supply details, on a separate sheet, of the structure of the organisation within the South West.

#### **Outcomes Monitoring**

If the application is successful, the Clare Milne Trust will require a report 12 months from receipt of the grant indicating how many persons with a disability have been helped and how.

#### **Data Protection**

Here at the Clare Milne Trust, we take privacy seriously and will only use any personal information as part of the grant application and grant making process. We will not share any personal information with any third party unconnected with the Clare Milne Trust unless we are legally required to do so. We will retain personal information for no longer than is reasonably necessary, and for no longer than legally required in line with standard limitation periods.

You can find the full version of our privacy policy online - [www.claremilnetrust.com/privacy-notice](http://www.claremilnetrust.com/privacy-notice)

#### **Next Steps**

Please keep a copy of this application for your records and send the application via email to [secretary@claremilnetrust.com](mailto:secretary@claremilnetrust.com).

Please ensure that you include the following:

- A signed cover letter on headed paper
- A signed copy of the application form
- Supporting information, as applicable

Please submit the application and supporting documents electronically. If you are unable to do so, or if you have any queries regarding the application, please contact Emma Houlding via email on [secretary@claremilnetrust.com](mailto:secretary@claremilnetrust.com) or call 01395 270418.