

## GRANT PROGRAMME

### GUIDELINES FOR APPLICANTS

#### INTRODUCTION

The Lloyds Bank Foundation for the Channel Islands is a grant-making Foundation, the income of which is derived from a shareholding in Lloyds Banking Group. The Foundation is independent of the Group. Its policies are determined by a Board of Trustees, which meets on 3 occasions throughout the year, agrees on the Foundation's strategic priorities and distributes the funding.

The Foundation's mission is to support charitable organisations which help people, especially those who are disadvantaged or disabled, to play a fuller role in communities throughout the Channel Islands.

#### AREAS OF SPECIAL INTEREST

**The Trustees review changing social needs from time to time, and identify specific areas they wish to focus on within their overall objectives. Current priorities are:**

**Creating Positive Opportunities for Disabled People** - enabling people with either learning or physical disabilities to live independently

**Family Support** - including the development of relationship skills for young people, and encouraging good relationships between generations.

**Homelessness** - in particular helping homeless people back into mainstream society, including support after temporary or permanent accommodation has been secured

**Prevention of Substance Misuse** - including both education and rehabilitation

**The Needs of Carers** - for example, information and support services, and the provision of respite care

**Challenging Disadvantage and Discrimination** - Promoting understanding and encouraging solutions which address disadvantage, discrimination or stigma.

The Foundation supports a wide range of activity addressing social and community need e.g. victim support; and to enhance learning opportunities for disabled and disadvantaged people of all ages e.g. literacy.

#### WHAT LIES OUTSIDE OUR GUIDELINES

The scope of the work needing support within the community is such that guidelines for grant-giving are necessary. The main areas of concern normally considered to be outside the Foundation's guidelines are:

- Organisations which are not registered charities
- Activities which are primarily the responsibility

of the Insular authorities in the Islands or some other responsible body.

- Activities which collect funds to give to other charities, individuals or other organisations
- Animal welfare
- Corporate subscription or membership of a charity
- Endowment Funds
- Environment - conserving and protecting plants and animals, geography and scenery
- Expeditions or overseas travel
- Fabric appeals for places of worship
- Fund-raising events or activities
- Hospitals and Medical Centres (except for projects which are clearly additional to statutory responsibilities)
- Individuals, including students
- Loans or business finance
- Promotion of Religion
- Schools and colleges (except for projects that will benefit disabled students and are clearly additional to statutory responsibilities)
- Sponsorship or marketing appeals
- International appeals - Trustees may from time to time consider a limited number of applications from UK registered charities working abroad

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### WHO CAN APPLY

The Grant Programme is open to any organisation which is registered as a charity. The Foundation encourages and welcomes applications from all sections of the community. All applications that fall within the Foundation's guidelines and objectives will be given equal consideration on grounds of merit.

### WHAT WE FUND

The Trustees are keen to support organisations which contribute to local community life at the grass-roots level. The Trustees are also keen to encourage the infrastructure of the voluntary sector and encourage applications for operational costs. This includes salary costs, which may be funded over two or three years, and training and education for managers and staff.

### HOW TO APPLY

You can access the application form on the Foundation website.

### WHEN TO APPLY

Applications can be submitted at any time. All applications are assessed on a continual basis and the Board of Trustees meets three times a year to approve grants. Decision-making can therefore take up to four months. Deadline dates may vary from year to year but are generally mid-February, mid-June and mid-October. All applicants are informed of the outcome of their application.

Applicants are advised to leave one year between applications (one year from the date of our grant offer letter).

### ADVICE ON COMPLETING THE APPLICATION FORM

**It is important to read these notes prior to completing your application form. The notes will take you through each section giving examples and prompts for the type of information required.**

#### Grant Application Form Section by Section.

##### ► CHARITY DETAILS

###### REGISTERED CHARITY NUMBER

Please provide your charity number gained through the relevant body in Jersey, Guernsey or the Charity Commission for England and Wales.

###### CHARITY NAME

Outline the name of your charity in full. Any abbreviated formats should be placed in brackets after the full name for example, "Lloyds Bank Foundation for the Channel Islands (LBFCI)".

##### ► INFORMATION ABOUT THE CHARITY

###### CLASSIFICATION

Please choose just one of the classification which best reflects the main focus of the work your charity does. We can only accept one classification per charity.

###### OUTCOMES

You must list three outcomes which your work creates for the people your charity supports.

For example, moving people into education, training or employment; reducing substance misuse/addictive behaviour; improved physical or mental health.

###### HISTORY & BACKGROUND

Please include the vision, mission, and aims and objectives of your charity.

###### MAIN ACTIVITIES & BENEFITS

Please include the day-to-day activities in your organisation, detailing the services and support you provide to give us a feel for your organisation's work. Please include who and how the people you support benefit from this activity.

##### ► GOVERNANCE & MANAGEMENT

To give us an idea of the size of your organisation, please indicate in the boxes provided the number of trustees, how regularly they meet, number of full time staff, part time staff, and active volunteers involved.

Please tell us the structure of your Board / Committee and Senior Staff including names and functions.

Please indicate in the boxes which of the policies and procedures you have in place, and list any quality marks and standards held by the charity, or if you are working towards achieving them.

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### ► YOUR FINANCES

Please complete the boxes showing your income and expenditure, free reserves and restricted reserves for last year, current year, and next year.

Please include details of any States and Parish funding.

Please include any key information in regards to your future application including significant contracts up for renewal, major grant completing, and new tenders.

### ► FUNDING REQUEST

#### WHAT THE GRANT WILL FUND

Please describe the service, support and activities, the type of people it will support and how this funding will support them.

#### NEED

Please tell us how you identified the need. Have you carried out research? Consultation with the people you support, other key stakeholders? Have you been asked to provide this service? How will this funding help you address this need. Please outline how this will fit with existing initiatives, and who are your partners and how you are/intend to collaborate with them.

#### THE DIFFERENCE THE GRANT WILL MAKE

Please describe the type of people you will support and explain how they are disadvantaged, and explain how they will benefit from this funding.

Please complete the box indicating how many people per year will benefit from this funding. For example, if you are providing an eight-week training course for 10 learners and you run this six times a year, the total number benefiting will be 60.

Please list a minimum of three expected outcomes specifically as a result of this funding, not general outcomes for the charity. For example, x people moved into independent living, x young people have increased self-confidence, x older people feel less isolated. The Foundation will use these outcomes to monitor what you have achieved.

#### TOTAL FUNDING REQUIRED

This figure is for the funding required overall, not the amount being requested from the Foundation (this figure could be the same if you are only applying to the Foundation).

#### TOTAL AMOUNT REQUESTED FROM THE FOUNDATION

Please indicate the total amount you are requesting from the Foundation. Then provide a breakdown of costs for multiple year funding requests. Then breakdown under budget headings. Please detail the other sources from which you plan to fund the balance required for the work, how much has been secured or is still pending.

### ► SUSTAINABILITY

If you plan to continue this work beyond our funding period, please explain how you plan to do this and raise the necessary funds. If not, please explain why the work is time-limited.

### ► ATTACHMENTS

In order for your application form to be considered for funding, the following documentation should be emailed with your application form or posted with a signed copy of your application form:

- Copy of recent bank statement
- Income tax letter of exemption
- Latest audited accounts
- Job description if applying for post(s)
- Business Plan if applying for multiple year funding

### ► YOUR CONTACT DETAILS

Please complete the full details for your main contact. This is the person who will be the main contact for the application. Please complete the full details for your organisation contact. This person must be a member of the Board or Management Committee and must be an authorised signatory for the charity and must be different from the main contact.

### ► DECLARATION

Please read the declaration and include signatures of two senior representatives of the organisation e.g. Chairman, Treasurer, Secretary or Chief Executive.

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