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| **Main Grants Scheme (Charities) Application Form - for Building Project Bids (request under £75,000)** |
| **Charity Registration Details & Contact Details** |
| CHARITY REGISTRATION DETAILS |
|   | Full registered name of charity (as per Charity Commission registration): |   |
|   |  |   |
|   | Please list any other names the charity has been known by and provide information on why the charity is/has been known by any other name/s (e.g. working/trading name, previous name) |   |
|   | Please provide all other names including previous names, also known as names, associated with names, etc. |   |
|   |  |   |
|   | When was the organisation originally established? |   |
|   | Please use the calendar icon to select you date (and then update the year if needed). We ask you to use the calendar to avoid errors with English v American date styles which are set by your web browser and we are unable to set for this page. |   |
|   |  |   |
|   | Charity registration number: |   |
|   | If you are an exempt charity (without a charity number), please provide your exempt charity number. |   |
|   |  |   |
|   |

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| --- | --- |
|   | What is your current charitable status: |
|  |  |
|   | <Select One> |

|  |  |
| --- | --- |
|   | When did the charity assume this status?    |
|  | Please use the calendar icon to select you date (and then update the year if needed). We ask you to use the calendar to avoid errors with English v American date styles which are set by your web browser and we are unable to set for this page. |
|   |  |

 |
|   | Please list your current Trustees: |   |
|   | Please simply list names of Trustees in the format below - do not add further details on the Trustees. Please write the list across as per the example below. |   |
|   | Trustees: e.g. A. Foyle, B. Foyle, C. Foyle... |   |
|   | How did you hear about The Foyle Foundation? |   |
|   |  |   |
|   | If other, please provide details: |   |
|   | Or please provide any further details of your selection above (if any). |   |
|   |  |   |
|  |  |  |
| FULL REGISTERED ADDRESS OF CHARITY (as per Charity Commission registration) |
|   | Street Address: |   |
|   |  |   |
|   | Town/City: |   |
|   |  |   |
|   | County: |   |
|   | <Select One> |   |
|   | Post Code: |   |
|   |  |   |
|   | Country |   |
|   | <Select One> |   |
|   | In which country/region is the charity based? |   |
|   |  |   |
|   | General charity email address: |   |
|   |  |   |
|   | General charity telephone number: |   |
|   |  |   |
|   | Website: |   |
|   |  |   |
|  |  |  |
| PRIMARY CONTACT (The primary contact should be the person who is taking responsibility for the application - this is the person we will contact if we require any further information while assessing your request, and then the person who should take responsibility for spending any grant made, and providing any post payment requirements. If the primary contact should need updating once an application is submitted, or once any grant is awarded, please contact the Foundation to let us know) |
|   | Title: |   |
|   |  |   |
|   | First name: |   |
|   |  |   |
|   | Last name: |   |
|   |  |   |
|   | Position within Organisation: |   |
|   | Please enter the full job title rather than an abbreviation or acronym. |   |
|   |  |   |
|   | Direct email address: |   |
|   | This should be a work email address, rather than personal (if possible). It needs to be a direct email address for this contact. |   |
|   |  |   |
|   | Direct telephone number: |   |
|   | This should be a work telephone number, rather than personal (if possible). It needs to be a direct telephone number for this contact. |   |
|   |  |   |
|  |  |  |
| HEAD OF ORGANISATION (if already the primary contact, please enter the details of a member of senior leadership). Please note that this additional contact should not be related to the primary contact. |
|   | Title: |   |
|   | <Select One> |   |
|   | First name: |   |
|   |  |   |
|   | Last name: |   |
|   |  |   |
|   | Position within charity: |   |
|   | Please enter the full job title rather than an abbreviation or acronym. |   |
|   |  |   |
|   | Direct email address: |   |
|   | This should be a work email address, rather than personal (if possible). It needs to be a direct email address for this contact. It must be a different email address to primary contact's email address. |   |
|   |  |   |
|   | Direct telephone number: |   |
|   | This should be a work telephone number, rather than personal (if possible). It needs to be a direct telephone number for this contact. It must be a different telephone number to primary contact's telephone number. |   |
|   |  |   |
|  |  |  |
| **Charity Details** |
| CHARITY DETAILS (please always summarise information, keeping your answers relevant, clear and succinct) |
|   | Please select from the following what best describes the core remit of your organisation: |   |
|   | This is the main purpose of your organisation. If your organisation's core remit falls between two selections, or it is not listed, please select the best fit. |   |
|   |  |   |
|   | What is the charity's purpose? How do you achieve this? And over what area/region? |   |
|   | Please summarise the normal activities undertaken, keeping your answer relevant, clear and succinct. |   |
|   |  |   |
|   | How many people benefit from your charity annually? |   |
|   |  |   |
|   | What steps has your charity taken to encourage and promote access to your work and activities (please include some further information if you work with groups/communities who have been underrepresented and/or marginalised). |   |
|   |  |   |
|  |  |  |
| **Charity Financial Information** |
| GENERAL |
|   | Please state your financial year end date: |   |
|   | For example, if your financial year runs from 1 April to 31 March, state: 31 March. In the following Charity Financial Information sections where we ask for annual accounts and annual budgets, we are asking you to provide these accounts and budgets in accordance with your financial yearend (NOT to any other 12 month period). |   |
|   |  |   |
|   | Please let us know if there is anything you would like to highlight within your accounts/budgets, or if anything could benefit from further explanation. |   |
|   | Such as reasons for an unusually high reserves, clarifying a complicated reserves position or reasons for a fluctuating turnover. |   |
|   |  |   |
|  |  |  |
| LATEST ACCOUNTS - Figures provided in text questions should correlate with figures provided in attachment. |
|   | Please attach your latest set of full signed accounts. |   |
|   |  |   |
|   | Please state your total income and total expenditure for your latest set of full signed accounts: |   |
|   | Yearend DD/MM/YYYY – Total Income: £--, Total Expenditure: £-- |   |
|   | What was your level of reserves as at the yearend for the latest signed accounts (excluding fixed assets)? |   |
|   | If possible, please let us know how much of these reserves were unrestricted, restricted and designated. Please provide further detail on your reserves position where possible, including restricted and designated purposes. |   |
|   |  |   |
|  |  |  |
| LATEST COMPLETE FINANCIAL YEAR (if applicable) - Applicable if there has been a completed financial year since your latest signed accounts, but for which accounts have not yet been finalised and signed. Figures provided in text question should correlate with figures provided in attachment. |
|   | Please attach draft accounts/income and expenditure summary figures for the latest complete financial year. |   |
|   |  |   |
|   | Please state your draft total income and draft total expenditure for your latest complete financial year: |   |
|   | Yearend DD/MM/YYYY – Total Income: £--, Total Expenditure: £-- |   |
|  |  |  |
| CURRENT ANNUAL BUDGET - Figures provided in text question should correlate with figures provided in attachment. |
|   | Please attach your current annual budget. |   |
|   | A breakdown of your anticipated total income and anticipated total expenditure projections for this current financial year. If your budgets are broken down by month, please ensure annual totals are also provided. |   |
|   |  |   |
|   | Please state your total anticipated income and total anticipated expenditure for your current annual budget: |   |
|   | Yearend DD/MM/YYYY – Total Income: £--, Total Expenditure: £-- |   |
|   | For your current financial year, how much of your budgeted anticipated total income has been raised/secured to date (please provide a list of the sources of funding and amounts). |   |
|   | Please ensure the figure provided includes income raised/secured from all sources, including earned income from activities, grants income secured through fundraising, and any other streams of income you may have. |   |
|   |  |   |
|   | For your current financial year, if you currently have a shortfall of your anticipated total expenditure, how do you plan to raise the remainder? |   |
|   | For applied for grants income, please state what has been applied for, from where, and expected decision dates. |   |
|   |  |   |
|  |  |  |
| NEXT ANNUAL BUDGET (if applicable) - Applicable if the request is for funding which would be spent in the year after your current financial year. This will often be the case when you are approaching your current financial year end. Figures provided in text question should correlate with figures provided in attachment. |
|   | Please attach the annual budget for your next financial year. |   |
|   |  |   |
|   | Please state your total anticipated income and total anticipated expenditure for your next financial year: |   |
|   | Yearend DD/MM/YYYY – Total Income: £--, Total Expenditure: £-- |   |
|   | For your next financial year, how much of your budgeted anticipated total income has been secured to date (please provide a list of the sources of funding and amounts)? |   |
|   |  |   |
|   | For your next financial year, if you currently have a shortfall of your anticipated total expenditure, how do you plan to raise the remainder? |   |
|   |  |   |
|  |  |  |
| OTHER FINANCIAL INFORMATION |
|   | How is your work normally funded? |   |
|   |  |   |
|   | Within your future budgeting have you considered the potential increase to expenditure due to inflation and rising utility costs? As an organisation, how do you expect to cope with these increases? |   |
|   |  |   |
|   | Do you have an ethical policy for fundraising, and if not, please explain why this is not considered necessary. |   |
|   |  |   |
|   | If you have an ethical policy for fundraising, please attach it here. |   |
|   |  |   |
|   | If you have recently incurred a deficit or have lost local authority, regular or other public funding or your turnover has gone down from previous years, please explain how your work remains financially sustainable. |   |
|   |  |   |
|   | What is your current reserves level as at date of application? If you have reserves are any of these funds designated or restricted? How are these being used to support your charity at this time. |   |
|   | Please include exact figures rather than number of months or reserves policy. |   |
|   |  |   |
|   | Were you able to access any COVID-19 recovery funds/grants and how were these used? |   |
|   | Please provide details including amounts received (and timeframes) and if they were awarded for specific purposes. |   |
|   |  |   |
|   | What borrowings have you incurred, or are contemplating, including COVID recovery fund (CRF) loans. |   |
|   |  |   |
|   | If you have taken out loans, what are the interest terms and the repayment timescale including capital repayment. How do you expect to be able to repay these loans? |   |
|   |  |   |
|   | Please describe how you consider the charity will be financially viable over the next 12 months. |   |
|   |  |   |
|  |  |  |
| **Funding Request Details** |
| ABOUT THE REQUEST (please always summarise information, keeping your answers relevant, clear and succinct) |
|   | One line description of funding request: |   |
|   | This should be a very clear short description purely stating what you are requesting funding for. It can be as simple as “towards the capital redevelopment”. |   |
|   |  |   |
|   | Do you consider this an Arts or Learning request? |   |
|   | Please select which you feel is the more appropriate. If the request crosses over both Arts and Learning, please select whichever you feel is more suitable, and this may be internally changed. |   |
|   |  |   |
|   | Please select from the following what best describes the remit of your funding request: |   |
|   | Please select which you feel is the most appropriate. If the request crosses multiple of the remits, please select whichever you feel is most suitable, and this may be internally changed. |   |
|   |  |   |
|   | In which region is the building based? |   |
|   |  |   |
|   | Purpose for which funding is required: |   |
|   | More detail on your funding request. |   |
|   |  |   |
|   | Why is this capital project required and why do you need to embark on this project now, in these still challenging post-pandemic times? |   |
|   |  |   |
|   | If an existing building, what physical constraints are you seeking to overcome? What holds back the work of the organisation? If it is a new build, please explain the need for the new development, including details of any gaps in provision locally/nationally. |   |
|   |  |   |
|   | If your building is leased, please provide the terms of the lease, grounds for termination and the number of years remaining. |   |
|   | Please note we are unlikely to consider a request for capital funding if your lease is less than 20 years (if less, please discuss situation with the Foundation). This relates to capital costs that are fixed to the building - movable capital items such as lighting or staging that could be moved to a different building in the future could still be considered with a shorter lease. |   |
|   |  |   |
|   | Will this project reduce your carbon and environmental footprint? Please provide details. If not, please state why this is not possible. |   |
|   |  |   |
|   | How will the building project increase public benefit? |   |
|   |  |   |
|   | Once completed, how many people will benefit from the building project? |   |
|   |  |   |
|   | How will the improvements/new build enable the organisation to carry out your artistic/educational mission better? |   |
|   |  |   |
|   | Will this project support your work to diversify audiences/attenders/participants? |   |
|   | If a museum/Gallery, how will the project enhance interpretation or display of your collections and enhance audience development. |   |
|   |  |   |
|   | Please describe your project management structure and state why this is considered adequate. |   |
|   |  |   |
|   | Has a professional technical team been recruited? How were they chosen? |   |
|   |  |   |
|   | Who are or will be (if known): i. the architects and technical team ii. The project managers iii. The main contractors |   |
|   |  |   |
|   | What risk factors have been considered and how will these be minimised? |   |
|   |  |   |
|   | What are your contingency plans if activities/the project are unable to proceed as planned? |   |
|   |  |   |
|   | How will the project be monitored and evaluated? |   |
|   |  |   |
|   | How will you recognise any grant offered? |   |
|   | Such as crediting the Foundation in materials, funder boards etc. If a grant is made, we would expect to be acknowledged in a similar way to other funders at a similar level. |   |
|   |  |   |
|  |  |  |
| Project Timeframes |
|   | Please detail your request timeframes, including expected start and end dates (and start and end dates of wider project, if your request is towards a phased/larger project). Please state if these dates are flexible. |   |
|   | Please ensure you consider in your request timings that applications take up to four months to be assessed, and if successful, payment would follow a minimum of one month later. If you expect that your building work could commence before a decision date, please contact the Grants Team before proceeding. |   |
|   |  |   |
|   | Please attach a project timescale. |   |
|   |  |   |
|   | To what level of the RIBA design stages has the project progressed? |   |
|   | Please note that usually we will not accept an application if the design has not completed RIBA Stage 2 and reached RIBA Stage 3 (Developed Design). |   |
|   |  |   |
|   | Has the project obtained outline, or full, planning permission and listed building consent (if relevant)? |   |
|   | If still in progress or not required, please provide further information (including timings if relevant). |   |
|   |  |   |
|  |  |  |
| REQUEST FINANCIAL INFORMATION |
|   | Amount requested (please only enter the number alone, without a pound sign or comma). |   |
|   | (The minimum amount you can apply for is £10,000 and maximum £74,999. Please also note that if successful, the Trustees may award less than the amount requested.) |   |
|   |  |   |
|   | Please state the total budget for the project/activities. Please only enter the number alone, without a pound sign or comma: |   |
|   |  |   |
|   | Please attach the request budget. |   |
|   |  |   |
|   | What funding have you raised (including pledged grants) to date (please provide a list of the sources of funding and amounts): |   |
|   |  |   |
|   | Amount to be raised from other sources (if applicable) and how will this be raised and in what timeframe? Please provide a list of pending applications/amounts and decision dates as well as any other funding activities/sources (for example, box office, regular donors, earned income). |   |
|   |  |   |
|   | What is your current shortfall: |   |
|   |  |   |
|   | Has a realistic strategy/timescale for raising the project funding been devised? |   |
|   |  |   |
|   | Will the project proceed without funding from the Foundation? |   |
|   |  |   |
|   | Has a robust project budget including contingency been allowed for? (please provide details). Please explain why you consider that you contingency budget is sufficient given all the cost increases and delays that recent building projects have encountered. |   |
|   |  |   |
|   | Please attach your outline business plan (including income/expenditure projections). |   |
|   |  |   |
|   | Please provide a summarised explanation of your income/expenditure projections post completion of the project. |   |
|   |  |   |
|   | If this request is for an expansion of your facilities, how do you expect to fund any additional costs in the future? Or how will the grant contribute to the ongoing sustainability of the organisation? |   |
|   |  |   |
|  |  |  |
| **Safeguarding** |
| Safeguarding (the Foundation requires all applicants to follow safeguarding legislation and Charity Commission guidance) |
|   | Please provide a copy of your most recent safeguarding policy (there is an additional attachment option below, in case you have multiple safeguarding policies, i.e. if you have separate safeguarding policies for children and adults at risk). If you use safeguarding policy of umbrella organisation, you must still attach the policy here. |   |
|   | The policy needs to have been reviewed within the last 12 months. Please ensure that the policy clearly states the last review date within the document (not just on the attachment file title). |   |
|   |  |   |
|   | Additional attachment option in case you have multiple safeguarding policies, i.e. if you have separate safeguarding policies for children and adults at risk (please ensure both polices are attached in these cases). |   |
|   | The policy needs to have been reviewed within the last 12 months. Please ensure that the policy clearly states the last review date within the document (not just on the attachment file title). |   |
|   |  |   |
|   | Please confirm the date your most recent safeguarding policy/policies were last reviewed. |   |
|   | The policy needs to have been reviewed within the last 12 months. |   |
|   |  |   |
|   | Who does your charity work with: |   |
|   | Please select all that apply to you (at least one selection must be made) |   |
|   |  |   |
|   | Please add any further details on who your charity works with: |   |
|   |  |   |
|   | Please provide the name of the safeguard lead (this could be information on a partner organisation providing this expertise if applicable) |   |
|   |  |   |
|   | Has the organisation adapted safeguarding procedures for online/remote delivery or other delivery changes, if relevant? |   |
|   |  |   |
|   | What is the main safeguarding risk in the work you are doing, what have you done to address this risk? |   |
|   |  |   |
|   | Can you tell us in general terms an example of when you have had a concern about the safety and wellbeing of someone you have worked with and how you managed this? |   |
|   | (Please do not add personal data including the names of individuals. Information provided here is treated strictly confidentially.) |   |
|   |  |   |
|  |  |  |
| **Additional Attachments (not a requirement)** |
| If desired, provide any additional attachments (including promotional material) to support your case and/or to illustrate the work of your organisation. Please ensure all attachments are titled clearly, ideally in the following format: 'Your Organisation Name – The Document Type – The Year/Time Period Document Relates to'. |
|   | Attachment |   |
|   |  |   |
|   | Attachment |   |
|   |  |   |
|   | Attachment |   |
|   |  |   |
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| **Submission** |
| Authorisation to Submit Application |
|   | Do you have authorisation from the Trustees and Charity’s Management Team to make this application? |   |
|   |  |   |