

Historic Scotland

Direct Funding for the Voluntary Sector

Grant Application Form: 2009-12

Closing date for submission - 30th September 2008

Grant Application Form

Please read the following information, which is included in the application pack, before completing this form:

- notes on making an application (at the back of the application form)

Section A: BASIC INFORMATION

1. Name of organisation

2. Contact name

See Note 1

3. Telephone

4. Contact's position in organisation

5. Contact details of organisation: (Correspondence Address)

Postcode:

6. Telephone

7. Fax

8. E-Mail

9. Is your organisation a registered charity?

Yes

No

If yes, what is the charity number?

10. What is the status of your organisation if it is not a charity?

Section B: MORE ABOUT YOUR ORGANISATION

11. Tell us about your organisation. What are your aims and objectives?

See Note 2

12. What activities do you undertake to realise your aims & objectives?

See Note 3

13. How is your organisation staffed?

See Note 4

Full time :	<input type="text"/>
Part Time :	<input type="text"/>
Volunteers :	<input type="text"/>
Total :	<input type="text"/>

In kind contributions:

14. Does your organisation work in partnership or have links with any others?

See Note 5

Yes No

If yes, please provide details.

Section C: YOUR APPLICATION FOR GRANT

15. What will it cost to run your charity/voluntary organisation over the next 3 years? See Note 6

Year 1 : £

Year 2 : £

Year 3 : £

16. How much grant support are you requesting from Historic Scotland? See Note 7

Year 1 : £

Year 2 : £

Year 3 : £

17. Please provide details of each activity that is to be funded, including an explanation as to why this work is deemed necessary? See Note 8

Funded Activity 1 :

Funded Activity 2 :

Funded Activity 3 :

Funded Activity 4 :

18. How will this work help Historic Scotland achieve its objectives?

See Note 9

--

19. Breakdown of activities to be funded by grant:

See Note 10

Brief description of funded activity	Year 1	Year 2	Year 3	Total
Funded Activity 1 :	£	£	£	£
Funded Activity 2 :	£	£	£	£
Funded Activity 3 :	£	£	£	£
Funded Activity 4 :	£	£	£	£
Total	£	£	£	£

20. Other organisational activities for which you are not seeking Historic Scotland Grant (the total of Q19 + Q20, should match that provided in Q15).

See Note 11

Brief Description	Year 1	Year 2	Year 3	Total
Activity 1 :	£	£	£	£
Activity 2 :	£	£	£	£

Activity 3 :	£	£	£	£
Activity 4 :	£	£	£	£
Total	£	£	£	£

21. Are you aware of anyone else doing similar activity in your field of work?

Yes No

If yes, please provide details.

22. Please give details of all other funding received by your organisation including the source of funding, the amounts received and the purpose for which it will be used during the period covered by this application. This should include funding secured from other Scottish Government Depts. See Note 12

<u>Source</u>	<u>When did you apply?</u>	<u>Amount</u>	<u>Outcome of application</u>
		£	
		£	
		£	
		£	
		£	

Section D: IF YOU ARE SUCCESSFUL

23. When will you require grant instalments to be made? We normally pay grants quarterly but variations can and will be made if appropriate.

24. As part of an offer of grant, Historic Scotland will request that organisations provide specific and measureable targets and outputs for their activities, covering each year of the award of grant. Please consider and detail below proposed outcomes for the grant support being applied for. **See Note 13**

25. How will you monitor and evaluate the work that you will do? **See Note 14**

26. How will you fund this work should Historic Scotland funding come to an end?

Checklist

See Note 15

Please ensure that you have included the following:

Please tick

- Your most recent audited accounts, or independent statement of income and expenditure
- Your most recent annual report
- A copy of your equality policy.
- A recent newsletter - if applicable.
- A copy of your certificate of charitable status from the Inland Revenue - if applicable.
- A copy of your latest available Business Plan.

If none of these is available, please discuss with Martin Ross on 0131 668 8805, or email on martin.ross@scotland.gsi.gov.uk

Declaration

I apply on behalf of the organisation named above for a grant as proposed in this application in respect of expenditure to be incurred over the proposed funding period on the activities described above.

I certify that, to the best of my knowledge and belief, the statements made by me in this application are true and the information provided is correct.

Signature

Name

Position

Date

Return this form to Martin Ross, Development Officer, Historic Scotland, Longmore House, Salisbury Place, Edinburgh, EH9 1SH.

Notes on making an application

How to complete your application form

General

- Please complete the form electronically, print off, sign and return it to the person identified on the grants guide as the contact for the grant scheme from which you seek funding. However, if this is not possible please use **black ink** and **write clearly in BLOCK CAPITALS**, as we shall need to photocopy your application. If you are completing the form electronically please note that the fields are expandable.
- Please answer each question on the application form as fully as possible. An additional A4 sheet may be attached **only where extra information is crucial to the application**.
- Incomplete applications will be returned and this may delay consideration of your application.
- Make sure that your application has been signed. Otherwise, consideration of your application will be delayed whilst we return the form to you for signature.
- Please ensure you complete the checklist at the end of the application form and enclose the relevant documents with your application form when you send it to us.
- If you require a copy of this application form in another language please contact the grant-giving unit.

Section A: BASIC INFORMATION

This section tells us who you are and how we can contact you.

Note 1

The contact for your application should be someone who is able to discuss the work of your organisation and the application in detail.

Section B: MORE ABOUT YOUR ORGANISATION

This allows you to tell us more about your organisation, how it is staffed, and with whom it works.

Note 2

Please provide as much detail as possible about what your organisation is trying to achieve and which groups in general it is aiming to help. Your aims and objectives detailed here should be reflected in your proposed outcomes at Q.24. Your objectives should also be broken down by funding year, i.e. what you expect to achieve in year 1, year 2, etc. You should also provide details on the structure of your organisation and how it is managed. This information will be used to evaluate your use of the grant and will inform decisions on its continuation. Historic Scotland will not continue to fund organisations which are consistently unable to meet their objectives.

Note 3

Please explain what your organisation does by way of its day to day activities and how this enables you to achieve your aims and objectives.

Note 4

In line with our Volunteering Strategy, Historic Scotland is particularly keen to assist projects that have a significant contribution from volunteers. In completing your application, you should include the costs of recruiting, supporting and developing volunteers involved with the project, particularly any training required for your staff to ensure volunteers are effectively managed.

You may also wish to include details of any 'in kind' contributions that are made to your organisation and which are possibly not included formally within your other calculations. This could potentially include legal work or the provision of materials.

Note 5

Please provide as much information as possible on other organisations with which you currently work or have links with, or with whom you will work or have links with, on this project.

Section C THE APPLICATION

This section tells us about which scheme you are applying for, the amount of money you are seeking, and over what period of time.

Note 6

This should reflect the 3-year projected costs of running your organisation as set out in your latest Business Plan (please enclose a copy for reference).

Note 7

The aim of the Scottish Government is to provide a stable funding environment for voluntary organisations. Grants are therefore offered for up to three years. Please let us know if you are applying for a grant over a shorter period.

Note 8

Please tell us as much as possible about what this funding will be used for. If it is to be used to fund a particular project, please provide as much detail as you can on what the project will be doing. This could include the following:

- What type of work you plan to do
- Why it is needed
- Why your organisation should be doing it
- A timetable of the work to be completed
- What the outcomes of the work are expected to be and how these are to be achieved
- Who will benefit from the project

Please note that this and following parts of the application are split into four activity boxes, this is an

attempt to keep the application information tight and to the point and to discourage drilling down too far into individual specifics. However, some organisations may feel that this restricts the provision of sufficient detail in their application and if so, we are content to accept further information on a separate sheet.

Note 9

Details of Historic Scotland's aims and objectives are given in the Voluntary Sector Operational Policy Document, which can be found on Historic Scotland's web-site.

Note 10

Please detail in this section the operations that you are requesting Historic Scotland support to undertake and the level of funding each task will require to be seen through until completion, or for the period of the grant application. You should include, as a separate attachment, full details of the costs to be incurred and a breakdown of how these costs have been calculated.

These should be actual projected costs, not rounded amounts. Please do not forget to include any costs related to employing staff, such as National Insurance contributions, pension contributions, etc. As the Scottish government is committed to the principle of full cost recovery, please include the proportion of overhead costs relevant to delivering this project in your calculation.

Please note that we would also expect additional sources of income to be proportionately off-set against your organisation's activities. i.e. the total of all funding received by your organisation should approximately match the costed total of all of your organisations activities.

Note 11

Please detail in this section the additional operations that you are undertaking (but for which you are not seeking Historic Scotland funding) and the level of funding each task will require to be seen through until completion. You should include, as a separate attachment, full details of the costs to be incurred and a breakdown of how these costs have been calculated.

These should be actual costs, not rounded amounts. Please do not forget to include any costs related to employing staff, such as National Insurance contributions, pension contributions, etc. As the Scottish government is committed to the principle of full cost recovery, please include the proportion of overhead costs relevant to delivering this project in your calculation.

Note 12

Please detail in this section all other sources and amounts of funding that your organisation receives towards undertaking its activities.

Note 13

We will agree with you a set of targets and outcomes that our grant support is intended to help you achieve. You should ensure that the suggested proposals for targets submitted as part of your application are measurable and relate specifically to the grant-aided work.

Section D: IF YOU ARE SUCCESSFUL

This allows you to tell us: what you plan to do with any funding; why the work is necessary; who you will be assisting and how; and how your work will help the Historic Scotland to meet its objectives.

Please reflect your aims and objectives from Section C in your expected outcomes.

Note 14

Here you should let us know how you are going to monitor the outcomes detailed at Section Q.24 to ensure they are being achieved and making the difference you hoped for. You should think about:

- What signs will there be to show you your project is making a difference, how will you see and record these signs?
- Who will you need to communicate with to record the effect your project is having, do you need to collect this information from everyone who is benefiting or just a sample?

Note 15

It is important that we know as much about your organisation as possible before deciding whether to provide funding. Please ensure you provide the listed items.

HOW WE CHOOSE SUCCESSFUL APPLICATIONS

We cannot give grant to all applicants. Factors we take into account include:

- How your objectives match the Scottish Executive and Historic Scotland's objectives.
- The quality of your objectives and performance measures; how you show that costs are linked to outputs and outcomes, and how you will monitor the process.
- Partnership working; community and/or business involvement and support, and effectively managed volunteer input.
- How far the work avoids duplicating that of other bodies.

GRANT CONDITIONS

Full details of the conditions that will apply will be included in the grant offer letter should your application be successful.

Conditions include the following:

- We will ask you to return grant not used for the approved purpose, or not used within the financial year.
- We pay grant only on what you actually spend. We will ask you to return any overpayment.
- The grant is not to be used for party political advocacy or activity.
- Historic Scotland must be acknowledged in any publicity about the work assisted by our grant.

FREEDOM OF INFORMATION (SCOTLAND) ACT 2002

In accordance with the Freedom of Information (Scotland) Act 2002 that comes into force on 1 January 2005, Historic Scotland may be required to make any application for grant available for public scrutiny. In submitting a grant application, please let us know if there are any elements of it which

would prejudice substantially your commercial or other interests if they were made public. Please note there may nevertheless be a public interest in publishing the material submitted.

FEEDBACK

We aim to improve our procedures continuously. If you have any comments on this form or on our process generally, we should be glad to hear them. You may write your comments below or enclose a separate letter if you would prefer.

Where can I get further information?

If you need help with filling in your application, or if you have any questions about the application process, please contact Martin Ross on 0131 668 8805, or at martin.ross@scotland.gsi.gov.uk.