

## Programme One – Community Services and Infrastructure

### About this Guidance

This guidance is split into three main sections, all of which are important for potential grant applicants.

1. Is Large Grants the Correct Programme for You?
2. How to Apply
3. Our Strategy

### 1. Is Large Grants the Correct Fund for You?

The Shetland Charitable Trust is a community-based funder, we exist to improve the quality of life in Shetland.

Our funding aims to ensure activities and facilities that could not otherwise exist in the islands, operate with some stability and become embedded in the community to ensure sustainable value to Shetland's residents.

Our long-term perspective improves stability, but this does place limitations on our ability to fund every good application that is received.

#### Who are Large Grants for?

Under Large Grants we accept applications by organisations from the following list and with an annual income (see definition) in excess of £50,000:

- Charities
- Trusts
- Charitable incorporated organisations
- Not-for-profit community and voluntary groups
- Public sector organisations undertaking charitable activities

#### What can a Large Grant Fund Cover?

Large Grants are considered as Revenue funding and can be utilised to cover the expenses associated with delivering day-to-day services or activities.

## Our Goals

Through Large Grants, like all our funding, we aim to positively impact one or more of our Quality of Life goals outlined in our Strategy. Applicants that are likely to help us deliver our Quality of Life goals are more likely to receive support.

**Enabling Strong and Resilient Organisations:** Our goal is to enable strong and resilient charitable and voluntary organisations which enhance quality of life, respond to need, and adapt to changing conditions.

**Community Wellbeing:** Our goal is to foster a community enriched by social, cultural, and leisure experiences and a healthy environment.

**Individual Wellbeing:** Our goal is to open doors to physical activity and mental wellbeing so that individuals can actively pursue wellness in all its forms.

**Everyone Matters:** Our goal is for individuals facing crisis or enduring long-term disadvantage to be able to access compassionate support, practical help, and empowering solutions.

**Generational Fairness:** Our goal is for Shetland to be a place where the young and elderly are respected, can thrive, and prepare for the future on their own terms.

The Trust has a long-term perspective, and our success is intertwined with the achievements and success of the organisations we support.

## Our Principles

Those who can demonstrate alignment with our guiding principles are also more likely to be successful.

**Equality, Inclusion and Accessibility:** Our goals are better achieved when different voices and needs are heard and responded to, and impact experienced across our islands.

**Sustainability:** We are focussed on meaningful change for residents and helping to ensure Shetland is looked after for future generations.

**Outcome-led:** A strong focus on outcomes helps us and our supported organisations make good decisions, adapt to changing conditions, and maximise impact.

**Collaboration:** We believe working effectively together will lead to better solutions and create more impact.

## Specifics of Funding

There are no set limits on funding amounts, but when applying please be mindful that funding decisions are competitive and may vary based on the needs of other applicants and the Trust's budget constraints.

Funding applications can span from one to a maximum of five years (or until 2029/30, whichever is shorter). However, new applicants may initially receive one year of funding to demonstrate success before seeking additional support from the Trust.

Large Grants are **restricted** funding and designated for specific purposes such as salaries, projects, or services, including associated small equipment costs.

**We do not fully fund** projects, services, or activities. We prioritise applications that demonstrate matched funding appropriate to the project, service or activities size and scope.

## Who and What Cannot be Considered for Funding?

We will not consider applications from:

- Community Councils and Development Companies
- Public Halls or Clubs
- Community Museums or Heritage Centres
- Churches or organisations promoting a religion
- Private sector companies or commercial entities

We are happy to fund most revenue costs, however there are certain costs and activities that we would not consider supporting:

- Services, activities, or projects that are not Shetland based
- Funding for individuals
- Statutory services or responsibilities or the replacement of statutory revenue
- The salaries of staff employed by, or seconded from, another organisation
- Purchase costs of buildings and/or land
- Projects, services, and activities, which incorporate the promotion of political or religious beliefs
- Retrospective costs already incurred by the applicant
- Loan payments

## 2. How do I Apply for Funding?

Our application process is competitive, and while we strive to support all submissions, we may not be able to fund everyone.

Successful multi-year funding recipients will be required to provide annual updates on budgets, cash flow forecasts and outcomes. However, they will only need to resubmit applications upon completion of their award term.

Indicative future year funding may be offered, subject to the organisation's compliance to grant conditions, the approved use of funds, and the availability of Trust funds.

### Timeline

Our indicative annual timeline for the Large Grant scheme is:

<b>June</b>	Large Grant Scheme opens for new applications
<b>August</b>	Closing date for new applications
<b>November</b>	Indicative decision of awards with email notification to grantees
<b>February</b>	Grant Offer Letters issued
<b>April</b>	Payment of 1 <sup>st</sup> instalment of funding

Please monitor the Trust's website and local press for precise dates that scheme opens and closes.

### What Information Does my Organisation Need to Apply?

Applicants must have a minimum of three members on their group or charity's management committee or board, with at least two members being unconnected. "Unconnected" refers to individuals who are not related by blood, married, in a relationship, or residing at the same address.

### Supplementary Information Required

- Please note that applications will require the following supplementary information:
- Copy of applicants Governing documents;
- Copies of last three years independently verified financial statements;
- Copy of a recent bank statement in the name of the group or charity;
- Organisation's Management Committee / Board Representatives;
- Copies of Adult/Child Protection policies and procedures, if appropriate;
- Outcomes and indicators for project, service, activity (Template: Appendix A);
- Cost breakdown of project, service, activity applied for (Template: Appendix B);
- Cash flow forecast (Template: Appendix B);

## Requirements of All Successful Large Grant Applicants

### *Accounting for Grant Awards*

- Independently identify receipt of the Trust's **restricted** funding in the reserves statement of your annual financial statements, and any surplus should be detailed.
- Provide management accounts for the organisation to account for the grant on a quarterly basis.
- Provide annual financial statements within six months of the end of the period for which the grant was given.
- Repay to the Trust any unused monies in the **restricted** reserve in excess of 3 months of the total grant using a pro rata calculation (see definition).

### *Reporting Against Agreed Outcomes and Indicators*

- Provide progress reports at six and twelve months to enable the Trust to monitor the impact of the grant award.
- Acknowledge the grant publicly as appropriate and as practical, in accordance with the Trust's published grant acknowledgement guidelines.
- Comply with every request from the Trust for the supply of any information as required for the proper monitoring of the grant, including the minutes of formal meetings where appropriate.

## What Happens When We Apply?

Once we receive your application, we will acknowledge receipt by email. Please note that late applications **will not be considered**. Therefore, to ensure your application is processed, please contact us if you do not receive an acknowledgement.

Your application will then be assessed by Trust staff against the approved application criteria for recommendation and final decision by the board of Trustees.

### **If your application is successful:**

Successful applications will receive notification of an indicative award by email prior to agreeing outcomes and budgets. A Grant Offer letter will be issued in February. This should be signed and returned within 6 weeks of the date of offer. Failing to do so may result in the grant offer being withdrawn.

Your organisation must comply with the grant conditions and use the grant only for the agreed purpose.

### **If your grant application is unsuccessful:**

The organisation will be informed of the main reasons it was not successful.

## Application Forms

[You can download a copy of our application questions and help text here.](#)

[And our online application form and appendix templates are available here.](#)

## 3. Our Strategy

### Our Purpose

Our purpose is to improve quality of life in Shetland. We support community-based voluntary and charitable organisations to provide services and associated facilities that help individuals and our community to thrive.

### Our Approach to Success

Success is described in our Quality of Life goals. We aim to improve individual and community wellbeing, reduce disadvantage and improve generational fairness.

We know strong and resilient charitable and voluntary organisations are vital if we are to achieve these goals.

### Our Goals

Through our Large Grants, as with all our funding, we want to support projects and activities that support our Quality of Life goals as described below:

**Enabling Strong and Resilient Organisations:** Our goal is to enable strong and resilient charitable and voluntary organisations which enhance quality of life, respond to need, and adapt to changing conditions.

**Community Wellbeing:** Our goal is to foster a community enriched by social, cultural, and leisure experiences and a healthy environment.

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**Generational Fairness:** Our goal is for Shetland to be a place where the young and elderly are respected, can thrive, and prepare for the future on their own terms.

## Our principles

Our decision making and activity are guided by the following principles:

**Equality, Inclusion and Accessibility:** Our goals are better achieved when different voices and needs are heard and responded to, and impact experienced across our islands.

**Sustainability:** We are focussed on meaningful change for residents and helping to ensure Shetland is looked after for future generations.

**Outcome Led:** A strong focus on outcomes helps us and our supported organisations make good decisions, adapt to changing conditions, and maximise impact.

**Collaboration:** We believe working effectively together will lead to better solutions and create more impact.

## Definitions

**Annual Income:** The income your organisation received during the financial year. If your organisation has been in receipt of one-off funding for a capital project, or such like, this will be reviewed when assessing the application. If we are in agreement, this could be deducted from your income to determine eligibility for the scheme.

**Unused funds:** In the event that Trust funds are not used during year of award, the value must be recognised in the annual financial statements. Organisations may retain up to 3 months of the annual award using a pro rata calculation (annual award / 12 months x 3 months). Any funds in excess of this value should be repaid to the Trust.