

**Shetland Charitable Trust
Small Grant Scheme – Guidance Notes****Contents**

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1. Introduction

OUR PURPOSE

The purpose of the Trust is to use its available funds to benefit and improve the quality of life of all people living in Shetland, and to preserve the Trust reserves for future generations.

OUR AMBITION

Over the period 2020-2025, the Trust will seek to use its funding:

- To improve the quality of life for all the people of Shetland;
- To achieve a positive impact against the Trust Strategic Objectives through its disbursement decisions;
- To promote inclusion and reduce inequalities in Shetland;
- To demonstrate the impact and outcomes of Trust funding.

FUNDING STRANDS & OBJECTIVES

The Trust will consider funding for the following strands of activity:

- Arts and Culture
- Sport and Recreation
- Heritage and the Environment
- Social Care and Welfare

The objective for the Scheme is to promote social inclusion and reduce inequalities in Shetland.

2. Who can apply?

Under this scheme we accept applications from organisations undertaking activities in Shetland that meet the Trust's charitable objects.

Any constituted community group with a turnover of less than £50,000 per annum can apply for this scheme.

Organisations with a turnover of over £50,000 per annum may be eligible to apply to the Main Grant Scheme.

3. What can we fund?

We will consider funding projects, services or activities that meets one or more of the Trust's funding strands and will promote inclusion and reduce inequality issues in Shetland.

Revenue costs will be eligible, this could include project costs such as volunteer expenses, transport etc. All project costs should relate to the objective of reducing inequalities and/or

promoting inclusion in Shetland. Capital costs may only be considered for expenditure associated with the purchase of equipment or the adaptation of existing buildings. For example, purchasing a piece of equipment, which would allow someone with a physical disability to participate in mainstream activities.

We are a match funder; this means we **do not fully fund** projects, services or activities. Funding of up to 75% of total eligible costs can be requested.

We do not fund the following:

- Projects, services or activities that do not meet the Charitable objects of the Trust
- Work which does not address one of our funding strands
- The standalone purchase costs of buildings and/or land
- Statutory services or responsibilities or the replacement of statutory revenue
- Costs of any activity that has taken place before a grant is awarded
- Costs that have been incurred for before we receive your application
- Loan payments
- Business or commercial ventures
- Recoverable VAT
- Funding applications by individuals
- Projects, services and activities, which incorporate the promotion of political or religious beliefs.

4. Your contribution

Applicants are encouraged to make every effort to obtain funding (eg. fundraising, charging or other external funding) which might further reduce any funding requested from the Trust.

We are a match funder; this means we **do not fully fund** projects, services or activities. Funding of up to 75% of total eligible costs can be requested.

5. The application process

Funding of £500 to £5,000 can be requested.

Our application process is competitive and we cannot fund every good quality application that we receive.

A full application is mandatory for all funding. An organisation may only submit one application each financial year.

In the application, you will be required to provide:

- Organisational Details;
- Project / Service / Activity details;
- Why Project / Service / Activity is needed;
- What your organisation wants to achieve with the funding.

You will also be required to provide the following supporting documents

- Constitution
- Most recent certified accounts or financial statements
- Most recent bank statement
- List of current management committee / board representatives
- Copies of Adult/Child Protection policies and procedures

Once you have submitted your application form, it is not possible to return this for further work. It is therefore important you are happy with your answers and have included all supporting documents before you submit your application.

6. When we receive your application

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 checked by Trust staff against the approved application criteria.

If your application is successful:

- Successful applications will be issued with a grant offer letter and acceptance docquet. The acceptance douquet should be duly signed and a complete copy of the grant offer letter returned within 6 weeks of the letter date, failing to do so may result in the grant offer being withdrawn.
- An organisation must comply with the grant conditions and use the grant only for the purpose set out in the application form.

If your application is successful:

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

7. Evaluating your grant

Evaluation

The Trust will require you to complete a short evaluation form explaining what you used the grant for and what difference it made. You will also be asked to provide brief information on the finances of the project. This must be completed 12 months after the grant payment was made. The Trust will provide a template evaluation form to be completed.

The Trust will randomly select a small number of grant awards each year to evaluate in more detail for audit and governance purposes. If selected you will be required to provide all additional information requested.

8. Application Checklist

Use this checklist to make sure you are ready to apply.

- We have read and understood this guidance document
- We have completed the application form
- We have fully demonstrated the need for the project / service / activity
- We have clearly demonstrated the funding will reduce inequalities and promote social inclusion
- We have attached all the mandatory supporting documents (See section 5)

Please note that we are unable to accept emails larger than 25MB.

9. Contact details

If you have any questions, please contact us before you complete the application form.

Our contact details are as follows:

Email: grants@shetlandcharitabletrust.co.uk

Shetland Charitable Trust

22-24 North Road

Lerwick

Shetland

ZE1 0NQ

Tel: (01595) 744994