



Administered by:



# FAIR SHARE TRUST PROGRAMME

## GENERAL APPLICATION FORM

### Birmingham Community Foundation serving Birmingham and the Black Country

#### Big Lottery Fair Share Trust programme

This form must be completed if your organisation is applying for a grant under the Fair Share Trust programme. ALL applicants should complete sections 1-4 and section 7. In addition:

**Complete Section 5 if your project will last ONE YEAR OR LESS**

**OR**

**Complete Section 6 if your project will last for LONGER THAN ONE YEAR or  
CONTAINS A CAPITAL PROJECT ELEMENT OVER £10,000**

Before starting to complete this form please make sure you have read the Fair Share Trust Guidelines and Local Priority Information on the area you have selected.

The form must be completed in English. Please write clearly in black ink or type your answers. Please do not submit any other documents or information apart from that requested in support of your application. If we require any further information this will be asked for during the assessment of your application.

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### Section 1 – Applicant Details

1.1 **Organisation Name.** This must be the same name as the one on your governing documents (constitution, or set of rules and the name of the bank account).

1.2 **Who will be the main contact for this application?** This should be someone who can talk about the application.

1.3 **Position of main contact person in the organisation named in Q 1.2?**

1.4 **Main contacts contact details**  
Main Telephone No.

Best times to call	
Alternative Telephone No.	
Best times to call	
Fax number	
E-mail Address	

1.5 **Address for correspondence, including full postcode**

	Postcode

1.6 **Organisation's address (if different)**

	Postcode

1.7 **What is your organisation?** You must send a copy of your governing document (constitution or set of rules).

- Public (government, including local authorities and health authorities)
- Private
- Charitable, voluntary or community (including mutual benefit)
- Other (please describe)

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1.8 **Is your organisation a registered charity?** Yes  No

**If yes please state your registration number**

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1.9 **Is your organisation a branch or division of a larger organisation?** If Yes please give details below.

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1.10 **Briefly describe the purpose of your organisation.** Describe the usual projects or activities you provide. If you are a new organisation describe what you plan to provide.

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1.11 **When was your organisation established?**

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1.12 **How many people are involved in your organisation?** (Please give numbers).

Management committee	<input type="text"/>	Members	<input type="text"/>
Users	<input type="text"/>	Volunteers	<input type="text"/>
Paid staff (full time)	<input type="text"/>	Paid staff (part time)	<input type="text"/>

Other (Please explain)

1.13 **Other Funding.** Please tell us about any other funding from the Fair Share Trust, National Lottery, or local or national government departments that your organisation has received in the last two years (continue on a separate sheet if necessary).

Funder(s)	Purpose of Grant	Value (£)	Finish date

1.14 **Has your organisation previously applied to [Birmingham Community Foundation]?**

Yes  No

If 'yes', please give details

## Section 2 – Financial details about your organisation

### 2.1 Does your organisation have a bank account?

Yes  (Please complete the details in Q 2.2) No

You do not have to have a bank account to make an application, but you will need to have set one up before any payments can be made.

### 2.2 Bank Details

Account Name	
Bank/Building Society Name	
Bank/Building Society address	
	Postcode

Sort Code  Account Number

Building Society Roll Number (if applicable)

If you have a bank or building society account please submit either an original bank statement (no more than 3 months old) or a copy of your building society passbook stamped and signed as authentic by the building society.

### 2.3 How many signatures do you need to authorise a cheque from this bank account?

There must be a minimum of two people (for Unincorporated Clubs or Associations these should be unrelated people).

Please state number

### 2.4 Please provide a copy of:

- – your most recent annual accounts, and
- – a total organisational budget for the current financial year:

Existing organisations: You must provide a copy of your organisation's latest accounts.

New organisations: If you are a new organisation and do not have annual accounts please provide an estimate of your income and expenditure for the first 12 months of your operation.

## Section 3 – Ownership of property details

**Capital Projects Only** This section should only be completed if you require capital funding

### 3. Ownership of property

- 1 What type of tenure is secured on the property by your organisation? If applicable please supply a copy of the lease document.

Freehold

Leased (State expiry date)

Other (Please explain)

If leased you should also provide evidence of the lessee's consent to the building alterations proposed.

We will only give grants to lease holders with the following minimum length of leases:

Total capital cost of building work and fees	New Build and extensions	Alterations and refurbishment
£100,000 and over	20 years	15 years
£30,000 and over	10 years	10 years
Under £30,000	5 years	5 years

#### Section 4 – Project beneficiary details

4.1 **When will the project start?**   
**When will the project finish?**

4.2 **Will your project work with children and young people?**

Yes  No

If 'Yes' please describe how you intend to deal with child protection issues and include a copy of your organisations Child Protection Policy.

4.3 **Potential beneficiaries of this project**

Does your project specifically target, or is it particularly relevant to, any of the following three groups? (please tick all that apply)

**AGE**

Under 16  16 – 64  65 and above

**PEOPLE WITH DISABILITIES**

**GENDER**

Female  Male

4.4 **Will your project create any JOBS? If Yes, how many?**

**Full time**  **Part time**

4.5 **Will your project create any VOLUNTEERING OPPORTUNITIES? If Yes, how many?**

**Up to 10 hours a week**  **10 hours or more a week**

**4.6 Ethnicity**

Does your project specifically target, or is it particularly relevant to, any of the following ethnic groups? (please tick all that apply)

**White**

British	<input type="checkbox"/>
Irish	<input type="checkbox"/>
Other White background (please specify)	<input type="checkbox"/>

**Black or British Black**

Caribbean	<input type="checkbox"/>
African	<input type="checkbox"/>
Other Black background (please specify)	<input type="checkbox"/>

**Mixed ethnic background**

White and Black Caribbean	<input type="checkbox"/>
White and Black African	<input type="checkbox"/>
White and Asian	<input type="checkbox"/>
Any other mixed background	<input type="checkbox"/>

**Chinese or other ethnic group**

Chinese	<input type="checkbox"/>
Any other ethnic background	<input type="checkbox"/>

**Asian or Asian British**

Indian	<input type="checkbox"/>
Pakistani	<input type="checkbox"/>
Bangladeshi	<input type="checkbox"/>
Other Asian background (please specify)	<input type="checkbox"/>

**4.7 Total beneficiaries**

How many people in total will benefit from your project?

## Section 5 – Information for projects of ONE YEAR OR LESS

Only complete this section if your project will last ONE YEAR OR LESS.

If your project is for LONGER THAN ONE YEAR OR contains a CAPITAL PROJECT ELEMENT OVER £10,000 please go straight to SECTION 6

### FOR OFFICE USE ONLY

- Build capacity and sustainability in local communities, including support for community assets and planning and involvement in local regeneration
  
- Build social capital offering funding for local social developments, supporting job creation, skills development, social networks and community engagement in local organisations, activities and initiatives
  
- Improve the local environment, enabling communities to make it safer, healthier, greener, cleaner, better designed and more welcoming and accessible to all groups

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## Section 5: Your project

5.1 **Project Title:**

5.2 **Which Fair Share Trust Neighbourhood(s) will your project be delivered in?** If your project will not be delivered in a Fair Share Trust Neighbourhood please describe how the project will benefit a Fair Share Trust Neighbourhood.


**\*\*Include postcodes for any neighbourhoods given**

5.3 **Please describe your project, what do you want to do?**

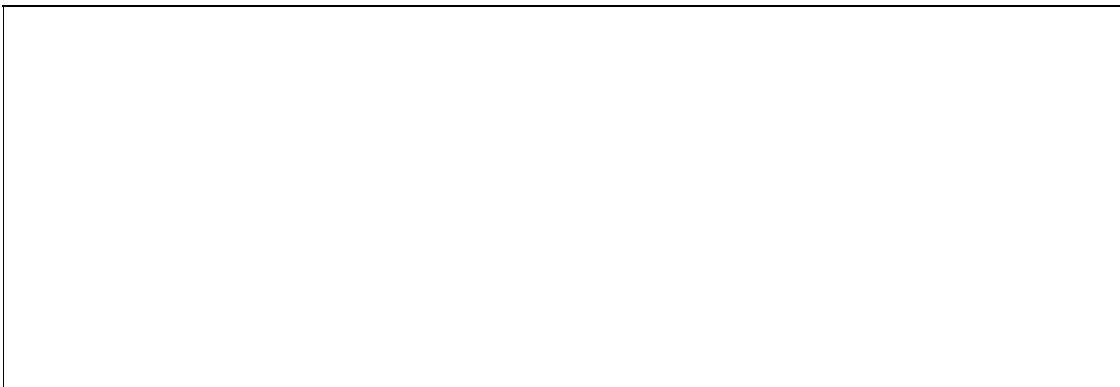
5.4 **Why does the Fair Share Trust Neighbourhood local community need this project?**

5.5 **Where did the idea for this project originate?**

5.6 **How does your project meet the aims of the Fair Share Trust programme?**

A large, empty rectangular box with a thin black border, intended for the user to provide a written response to question 5.6.

5.7 **How does your project meet the priorities set out in the Fair Share Trust Priorities Document for your area and link with the National Programme?**

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5.8 **How will your project address issues of equal opportunities?**

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**Capital costs** (Please see Capital Guidance notes in the Information for Applicants booklet)

Item	£
<b>Total Capital</b>	

<b>Total Project (Revenue and Capital)</b>	
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5.11 How much are you applying for?

£

5.12 If you are not applying to us for the total cost of your project please tell us how you intend to finance the rest of the project and whether you have secured this funding or not?

5.13 If the project is ongoing please describe how the project will be funded in the future?

5.14 Are you aware of any other Fair Share Trust funded projects in your area? - What do you know?

## Section 6: Information for projects lasting LONGER THAN ONE YEAR OR containing a CAPITAL PROJECT ELEMENT OVER £10,000

Only complete this section if your project will last LONGER THAN ONE YEAR or contains a CAPITAL PROJECT ELEMENT OVER £10,000.

If your project is for ONE YEAR OR LESS, please complete SECTION 5

### *FOR OFFICE USE ONLY*

- Build capacity and sustainability in local communities, including support for community assets and planning and involvement in local regeneration
- Build social capital offering funding for local social developments, supporting job creation, skills development, social networks and community engagement in local organisations, activities and initiatives
- Improve the local environment, enabling communities to make it safer, healthier, greener, cleaner, better designed and more welcoming and accessible to all groups

## Section 6: Your Project

### 6.1 Project title

### 6.2 The Project Plan

You must submit a Project Plan. This is an important part of your application. It should address ALL of the elements listed below, under the same headings (a to k) and in the same order as shown. If your project contains capital building or refurbishment work over £10,000 you must also complete section (l). The purpose of the Project Plan is to give an overview of your project and should also provide particular details of distinct elements where appropriate. Please note that you are asked for a detailed financial breakdown later in the form (Question 7.5).

#### a) Aims and Objectives

Describe the strategic aims of your project and its specific objectives. Explain how it fits with the objectives of the Fair Share Trust and the priorities identified by the Fair Share Trust Local Panel. You should also include any longer term plans your organisation might have to make further applications to the Fair Share Trust programme.

#### b) Project Description

Describe the project, paying particular attention to where the project will be delivered, by whom and when. How it meets the aims of the Fair Share Trust programme and the priorities identified in the Fair Share Trust Neighbourhood Plan. This section should include 3 outcomes you have identified for your project. You should also describe how you will measure the success of your project.

For capital projects you should also give a short description of the proposed building works – the brief you have agreed, indicating accommodation requirements and overriding constraints or technical requirements.

All projects should also set out at least 3 milestones for their project to complete in each of the grant funded years. These will contribute to monitoring the success of a project and should all link to the overall outcomes of the project.

**c) Meeting Local Need**

Give details of how the project addresses local needs, the communities it will serve and any social or economical disadvantages faced by people in these communities. You should make reference to the Fair Share Trust Neighbourhood Priorities document drawn up by FSTLP and also how the need for your project has been researched with local people and other service providers.

Provide confirmation that the project will be additional to existing services and describe the steps that have been taken to ensure that it will complement, not jeopardise, existing services.

Detail how you will market the project to ensure potential beneficiaries are aware of it.

**d) Tackling Disadvantage**

Please describe the social and economic disadvantages faced by the communities that would be served by the new project. Describe how your project will help to tackle disadvantage in these communities. How will your project create a lasting benefit for those communities? You should also describe the links that the project has with other local, regional and national strategies and programmes which aim to regenerate the neighbourhood or improve the social and economic circumstances of particular groups in the Fair Share Trust Neighbourhood.

**e) Community Support**

Please describe the steps you have taken to ensure that the project has the support of the local community, local employers and other local organisations which may have an interest in the project.

**f) Project Funding**

You will need to provide a full breakdown of funding for the project (capital and revenue) at Section 6.3. In this section of the Project Plan please provide:

- ⊗ A description of any funding you anticipate receiving from other public, voluntary or private sector sources – indicating whether or not this funding has been secured and, if not secured, when will you receive confirmation that it is.
- ⊗ Details of any in-kind contribution you expect to receive/ have received for the project.
- ⊗ For capital projects you should also describe:
- ⊗ What steps you have taken to ensure that no extra costs will be incurred as a result of irrecoverable VAT?
- ⊗ The basis you have used to calculate the capital budget including whether the prices are estimates prepared by a competent professional (e.g. quantity surveyor) or are tendered against an agreed specification.
- ⊗ You should demonstrate the steps you have taken to ensure value for money.

**g) Sustainability**

You should demonstrate that you have reasonable plans to sustain the project once support from the programme ends. Please provide a funding plan that demonstrates how the project would be sustained once our funding ends. If your project is intended to operate for the grant funded period only please explain why this is the case.

Your funding plan should describe any applications you have made, or intend to make, to other public sources: any local fundraising events you intend to undertake and any contributions in kind you expect to receive. If your project anticipates generating income then this should be estimated and included in this section. You should also provide details of contingency plans should your applications to other funders prove unsuccessful.

If the sustainability of your project is dependant upon applications to any private or public sector funders you should indicate whether or not this has been secured and, if not secured, when you will receive confirmation that it is.

For capital projects you should also briefly describe, with reference to the overall project plan, how you will fund the ongoing maintenance of the building

**h) Project Management**

Please detail how and by whom the project will be managed and monitored. Give a summary of their roles and experience of running similar projects. If you are also applying for capital building works you should describe how the building project would be managed including whether you are using an Architect and / or project manager.

Give details of your experience in delivering good quality, well-managed services and your experience of receiving and managing grant based funding.

Describe the procedures for financial management used and financial reports that will be produced for this project.

Describe the features of your monitoring system that will enable you to measure the benefits to users.

What role will the users of the service have in the evaluation of your project?

Please provide a project work-plan that identifies key project milestones.

For capital projects you should also describe:

- ⊙ The programme of work including estimated times for issue of tender, start on site, completion on site and fit out of building:
- ⊙ The management of the capital works, which should demonstrate the systems you have in place to manage the capital aspects of the project.

**i) Project Staff / Volunteers**

You should provide a breakdown of the number and types of new jobs that would be funded by the award, together with the normal hours of work and rates of pay.

Describe the role that volunteers will play in the delivery and management of your project.

How many volunteers will be involved and how will they be supported?

Please outline any links that your project has with local training providers and employment creation schemes such.

**j) Quality**

Describe what steps you have taken to date and will take in the future to ensure that the project provided is of good quality. This might include training and development of staff or aspirations towards a quality assurance programme.

For capital projects you should also describe:

- ⊙ How the project will comply with legislative requirements and be accessible?
- ⊙ What design aspects of your project do you think are particularly innovative?

If the scale of your works requires planning permission or is subject to building regulations, what status is your application for full planning permission at?

**k) Equal Opportunities**

Projects must comply with all statutory requirements with regards to equal opportunities. Fund Fair Share Trust programme funded projects should be accessible to everyone in the community who may wish to use them, and should reflect the interests and needs of all groups in the local community. Describe how you will address issues of equal opportunities.

**l) If your project contains capital building or refurbishment work over £10,000 you must include this section in your Project Plan**

Please read the full guidance in the Information for Applicants booklet and the Building Guidance Information booklet, available from The Birmingham Community Foundation

For capital building or refurbishment work over £10,000 we expect the applications to be at RIBA Stage D or equivalent. The following information is designed to give an overview of the information required for this. Please ensure you have answered the following points:

- ⊙ Given a short description of the proposed building works – the brief you have agreed, indicating accommodation requirements and overriding constraints or technical requirements.
- ⊙ Detailed a programme of work including estimated times for issue of tender, start on site, completion on site and fit out of building.
- ⊙ Described the management of the capital works, which should demonstrate the systems you, have in place to manage the capital aspects of the project.

You should also include with your application the following information:

- ⊙ List of consultants, their roles and how they were selected i.e. Architect, Quantity Surveyor
- ⊙ Photographs of the site and/ or existing building
- ⊙ Copies of any site investigation (if relevant), surveys of existing buildings, information on site conditions and ground investigations.
- ⊙ Drawings:
  - Location plan scale 1:1000, 1:1250 or 1:2500 showing enough contexts to identify position in and relationship to city/town or village.
  - Site plan scale 1:500
  - Proposed building plans i.e. ground floor, first floor plans, Scale 1:200, 1:100 or 1:50
  - Proposed building plans i.e. external elevations around the whole building to the same scale as the building plans.

- Section through key parts of building to the same scales as the plans and elevations.
- Other descriptions of project i.e. proposals to use low energy products or services.
- ⊙ Access:
  - A short description of how provision has been made for persons with disabilities i.e. ramped access, induction hoops, disabled toilets, Braille, lifts, use of clear signage etc.
- ⊙ Planning Consent
- ⊙ Evidence of the date that the application was submitted to the Local Authority, or the letter granting planning consent listing outstanding planning conditions.
- ⊙ Project Costs:
  - Detailed breakdown with accompanying calculations for:
  - Construction of new building (s)
  - Adaptation or extension of existing building.
  - Refurbishment of existing building
  - External works
  - **Approximate schedule of areas i.e. areas for each room.**
- ⊙ Proposals for procurement route
- ⊙ Proposed procurement route/contract type i.e. traditional Joint Contracts Tribunal (JCT) 98 intermediate form of contract tendered to a minimum of three tenders.



**Capital Costs**

Acquisition of property costs								
Investigations and surveys (Please specify)								
Construction of new building(s)								
Adaptation or extension of existing building								
Refurbishment of existing building								
External works (e.g. landscaping)								
Fixtures and fittings								
Equipment								
Statutory fees i.e. planning permission, building regulations								
Professional fees for capital work i.e. design team								
Other goods and services								
Contingency (see Guidance notes)								
Non-recoverable VAT								
Other (Please specify)								
<b>2 Total Capital</b>								
<b>Total Revenue and Capital</b>								

## 6.4 Other Income

Tell us how you will raise the other funds that you need for your project.

Years as above	Year 1	Year 2	Year 3	Year 4	Year 5	Total other income	Secured	
							Yes	No
Local Authority								
Public Funding								
European Funding								
Lottery Funding								
Local Trusts								
National Trusts								
Other (Please specify)								
Other (Please specify)								
<b>3 Total Other Income</b>								

## 6.5 Income and Expenditure over the project life

Year	Year 1	Year 2	Year 3	Year 4	Year 5
<b>(a) Total Project Cost</b>					
<b>(b) Total Grant Requested</b>					
<b>(c) Total Other Income</b>					
<b>Difference a-(b+c)</b>					

If there is a negative amount in any year please use the space below to explain how this will be addressed

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## Section 7 – References and declarations

### 7.1 Independent Referee

Name	
Occupation	
Address	
	Postcode
Telephone Number	

I can confirm that I know the applicant organisation. I have read the application and support the request for funding. I can be contacted to discuss the project further and may be asked to give a written reference. If the applicant proposes to work with children and young people then you must be able to confirm that the organisation actively implements its Child Protection Policy.

Signature

Date

### 7.2 Declarations and signatures

We declare that:

- We are authorised to submit this application on behalf of the organisation named in Q 1.1 of this form and certify that the enclosed information is correct.
- If this application is successful we agree to use the grant for the purpose shown in this application and to abide by the terms and conditions, including any special conditions, given to us by [Insert Fair Share Trust Local Agency Name].
- We understand that we will be expected to monitor expenditure and provide [Insert Fair Share Trust Local Agency Name] with regular information as requested.

**Signature**

**(Main contact named in Q 1.2)**

Date

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**Senior Contact**

**(this should be the Chair or similar)**

Name

Signature

Date

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## Check List

To avoid any delays in processing your application it is important that all the questions on this form have been completed, that the appropriate people have signed the form and that all requested documents have been enclosed.

Please tick the following boxes to indicate that all section have been completed and documents enclosed as necessary.

- All questions are answered completely
- The independent referee has signed Q 7.1
- The main contact has signed Q 7.2
- The Senior contact has signed Q 7.2
- Section 5 has been completed for projects of one year or less

**OR**

- Section 6 has been completed for projects of one year or more (or containing a capital build element of £10,000 or more)

### **The Following has been enclosed:**

- A signed and dated copy of the organisations constitution or set of rules (see Q 1.7)
- The most recent set of audited accounts, or the most recent set of income and expenditure projections (see Q 2.4)
- A total organisational budget for the current financial year (see Q 2.4)
- A bank statement or building society passbook (see Q 2.2)
- Appropriate capital information having read the guidance notes (see the Information for Applicants booklet)
- Appropriate information if your project involves working with children and young people (see Q 4.2)

You should keep a copy of this application form for reference

- Copy of form taken

Please return your completed application form to:

**Fair Share Trust c/o Birmingham Community Foundation, Nechells Baths, Nechells Park Road, Birmingham, B7 5PD**

**Tel:** 0121 322 5560 **Email:** [team@bhamfoundation.co.uk](mailto:team@bhamfoundation.co.uk) **Web:** [www.bhamfoundation.co.uk](http://www.bhamfoundation.co.uk)

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**Fair Share in the Black Country and North Solihull is administered by:**

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Registered Charity No: 1048162 ▪ Company Registration No: 3083289