

IDEAS THAT CHANGE LIVES GUIDANCE NOTES - KICK START GRANTS FOR ORGANISATIONS

These guidance notes are intended to help with filling in sections of the application form.

Applications received after the deadline or which exceed the word count stated will not be considered.

SECTION 1: ORGANISATION DETAILS

1.1 Organisation name: this needs to be your legal name as shown in your governing document. If you also have another name – a trading name, abbreviations etc – please also provide this.

Contact details. Details of who we can contact about your application. Please note, they need to be available during the 2-3 week period after you submit your application.

1.2 Type of organisation.

The fund is only open to third sector organisations and social enterprises that might include:

- Registered Charities, Voluntary and Community Groups seeking to develop ideas for income generation
- New start ups or established social enterprises including: CICs; Development Trusts; Industrial & Provident Societies; Co-operatives, Charitable Incorporated Organisations

We will not accept applications from:

- statutory organisations such as a school or local authority including statutory organisations that have charitable status
- organisations that make a surplus or profit which is not principally reinvested for social benefit
- purely religious or political organisations

All organisations which are eligible for support will have social or environmental aims quoted in their governing documents. We ask you to send a copy of these with your application form.

1.3 Staffing and Volunteers. We would like a bit more information about the size of your organisation in terms of staff and volunteers.

1.4 Aims and objectives. Use this section to tell us more about what your organisation does. Please note, this question is not for you to tell us what you want the funding for, this comes later in section 2.

1.5 What makes you a social enterprise? Please describe why you see your organisation as a social enterprise. What is it that you do / plan to do which makes you different to other organisations?

1.6 Annual income. Please indicate the annual income for your organisation for last year. This should be consistent with the information included in the accounts you provide.

1.7 Trading income. Please indicate how much of the annual income for your organisation is generated through the sales of goods or services.

SECTION 2: ABOUT YOUR APPLICATION

This is the section where we want you to tell us more about the activity that you are seeking funding for - what you would like to do, why you want to do it, how you will measure success, where you will deliver your project and who it is for.

- 2.1 Timescale.** Please tell us when you plan to start your project and when you expect to complete the activity for which you are seeking funding.
- 2.2 Activity.** Applications are invited from organisations looking to develop and / or implement ideas and services to help people to live independently in their own homes but need support to develop the idea further before a full business plan can be developed. **Projects must have a clear economic focus such as increasing income e.g. through a contract with an organisation or individuals paying for a service directly.** We will fund capital items or revenue costs. We are willing to fund pilot projects and start-up costs, or contribute to expanding or developing your current trading or enterprising activity.

In this section please tell us about your social enterprise activity / idea, how far advanced you are in planning or delivering and what you would spend the grant on (in broad terms; we ask you to provide a detailed budget in a later section).

Please begin your answer to this question with a short (two or three sentences) description of the essence of your activity / idea and what the grant would fund e.g. "We want to carry out a feasibility study regarding setting up a new enterprise to provide advice and install energy saving features to poorly insulated properties. The grant would fund consultancy costs." or "We would like to develop and expand on a pilot project we have worked on in East Leeds to open a new outlet and training facility. The funding would support the salary costs of the facility manager."

- 2.3 Demand.** Use this question to tell us how you know there is a need and demand for your proposed project. This may be based on your current experience of working in the area or could, perhaps, be based on some pilot work or feasibility study. The business advisers can also help signpost you to existing research and data sources which can give you information on the key social care priority groups. Who will be your main customers, how do you know they want your product / service and how will you market it?
- 2.4 Competitors.** Have you identified your competitors? What is unique about your organisation that will make it different to its competitors?
- 2.5 Income generation.** Projects must have a clear economic focus such as increasing income e.g. through a contract with an organisation or individuals paying for a service directly. Your answer to this section should explain how you will generate income to sustain the service you are looking to develop.
- 2.6 Key personnel / Trustees / board members.** We need to know brief details of the key personnel in the organisation and their relevant skills for delivering the project. Please also send us the list of your management committee/trustees/board members and identify if any are related. Please use a separate sheet to send us the details if this is easier.
- 2.7 Beneficiaries.** The Ideas that Change Lives programme is looking to develop services for specific groups of people who have care and support needs. Please indicate who will primarily benefit from your project and how many people will directly benefit?
- 2.8 Supporting people to remain independent.** The Ideas that Change Lives programme is looking to develop a variety of services to help specific groups of people who have care and support needs remain independent. Please tell us how your project is working towards this aim.
- 2.9 Beneficiary involvement.** We want to see that you have considered how the people who might use your service / activity could be involved in the planning and delivery of the project.

- 2.10 Accessibility.** You should explain how you will make your activity accessible to all who may want to use it. You will need to think about physical accessibility (e.g. large print, signers etc), practical accessibility (e.g. providing cover for care responsibilities) and other forms of accessibility such as culturally appropriate services (e.g. halal or kosher meal choice) or services which meet the needs of people with learning disabilities. We are looking to see that you understand the needs of your target market.
- 2.11 Targets / outputs.** What outcomes do you hope to achieve from the work? What will success look like? For example, production of a detailed business plan, running a pilot project which shows potential for a larger programme, carrying out market research and producing a customer and marketing plan.
- 2.12 Measurement of impact.** Please explain how you will measure the targets referred to above, the impact of your work and whether you have been successful. How will you collect evidence of any outputs if applicable? For instance, if you intend the grant to be used to carry out market research then a measure of success may be a complete market research report which shows whether there is likely to be demand for the proposed new service/activity.
- 2.13 Location.** Where will the prime activities funded by the grant take place?
- 2.14** Please tell us how you heard about the Ideas that Change Lives programme e.g. Leeds City Council, Community Foundation website, local CVS, Community Foundation mailing, Ideas that Change Lives website, specific briefing event, other event, press (please specify). This helps us see which of our marketing strategies is most effective.
- 2.15 Community of Interest.** Please note that this question will not be taken into consideration when assessing your application but is to assist us with equal opportunities monitoring.

SECTION 3: BUDGET

We acknowledge that the costs of what you want to do may be more than £2,000 (the upper limit for the small grants fund) so we are interested in knowing the total costs of your planned activity.

- 3.1 Total cost.** Please put the total cost of your project here
- 3.2 How much money are you applying for.** Please detail how much you are asking for from the Fund (the maximum amount which can be requested is £2,000).
- 3.3 How much has been raised so far.** If you are asking for less than the total cost, please tell us how much has already been raised towards the project.
- 3.4 Other sources of funding.** If you are asking for less than the total cost, please supply details of other funding which you have already secured (as set out in question 3.3), or expect to receive. If you are waiting for a decision from some funders, please indicate when this might be received.
- 3.5 Budget.** Use the budget breakdown summary to provide more detail for the key costs Please use a separate sheet if required. Please be as detailed as you can about how you have calculated costs (e.g. room hire at £10 per hour for 4 hours; salary costs for manager 10 hours at £20 per hour for 6 weeks). If you are sourcing support from external providers (e.g. consultancy work, legal or other professional support) please explain clearly how you have estimated the cost and time required. We acknowledge that consultancy costs can vary considerably but a day rate of £350 is the maximum daily rate which can be funded through a grant. Costs may include headings such as:
- Staff costs
 - Operational / activity costs
 - Office/overhead/premises
 - Capital Cost (you will need to send us quotes for any items costing £500 or more)

- Publicity/design
- 3.6** Please provide your organisation's bank details.
- 3.7 Referee.** Please provide us with the contact details of a referee. This should be someone who knows and has seen your work in a professional role but is independent of your group. The referee must not be a member of your Committee, someone who uses your services or a member of your family.

SECTION 4: SUPPORTING EVIDENCE

If you do not include all the relevant information we have requested we may consider your application incomplete and might reject it. However we appreciate that some of the documentation requested may not be applicable for your organisation or the stage you are at in developing your project. We therefore ask that if any of the documentation is not relevant please tell us why you have not included the items requested.

Governing documents. In all cases we require a copy of your governing documents i.e. rules / constitution / memorandum and articles of association. These should clearly show social or environmental aims and that there are no restrictions which would prevent the proposed activity from taking place (e.g. restrictions on income to be earned from trading).

Latest audited accounts. We would expect these to be for year ending no earlier than March 2013. We can accept approved accounts if this is more appropriate for your organisation. If you have been trading for less than a year then please provide management accounts as below.

Management accounts. Please provide full management accounts to bridge the period since the last audited / annual accounts were prepared or since your organisation started if you have not yet had to produce accounts for a full year's operation.

Bank statements. Please provide a copy of your most recent bank statement, confirmed as a true copy by two of your authorised cheque signatories.

Project plan. Please provide a project plan which outlines the key activities and milestones for at least the first 12 months of your proposed activity.

Cash flow forecast. Please provide a cash flow forecast to cover at least the first 12 months of your proposed activity.

Quotes. If a budget item costs £500 or more then please attach a quote for the item to your application.

We may request additional documentation and copies of policies as part of the assessment process.

SECTION 5: DECLARATION

This should be signed by two senior members of staff, trustees, directors, board members or members of the management committee, as appropriate for your organisation. They must be authorised to submit the application, accept the terms and conditions and make the declaration on behalf of the group.

Please return a signed copy of the form together with all supporting documentation to the address on the application form.

Please also email a copy of the form in Word format to the email address on the application form.

The form and all supporting documentation must be received by the deadline. Incomplete or late applications cannot be accepted.