



Congregational & General Charitable Trust

GRANT APPLICATION GUIDANCE NOTES

PLEASE CHECK YOU HAVE THE MOST UP TO DATE FORM ON OUR WEBSITE AND READ NOTES BELOW BEFORE COMPLETING FORM:

- It is important that you complete the form satisfactorily. You may be refused a grant if you leave any relevant questions unanswered, if we cannot read your writing, or if any part of the documentation is in a language other than English. We do not accept forms completed by a third party.
- Please note the Trust do not normally support retrospective applications for projects. Work should not have commenced at the date of the application.
- The following areas are **not** eligible for a grant:
 - Running costs of the church
 - Organ and Church bells restoration
 - Conservation/restoration of works of art
 - Graveyard maintenance
 - Manse works
- Projects costing in excess of £1 Million will not be supported but if the project is split into clearly defined and discrete phases, an application would be considered.
- You will need to attach your latest church annual report and full accounts including balance sheet, notes to the accounts and any overview/directors' report.
- Provide documentary evidence supporting the estimated cost of the project. Actual quotations from proposed contractors are preferred as the level of grant is based on percentage of the costs.
- Appeal leaflets and project literature will be helpful; but you must fill in all the details requested on the form. It is not enough to write "See attached document".
- You may be refused a grant if the only accounts you submit are those for the project; or if you fail to show the church's capital assets, or any other grants you have received.

Please email documents to: admin@candgtrust.org.uk or send completed form and supporting documents to: Bea Walshaw, Trust Administrator, Congregational and General Charitable Trust, PO Box 1111, Lincoln LN5 0WJ

Congregational & General Charitable Trust

GRANT APPLICATION

Section 1 – Organisation Details

1.	Name of Church or Organisation			
2.	Church Denomination:			
3.	Church Address:			
4.	Church Website (if applicable)			
5.	Contact Name:			
6.	Contact Address (if different from Church Address):			
7.	Daytime Tel No		7a. Email	
8.	How many people, on average, attend Church services?			
9.	Give a brief description of your church premises and its age:			
10.	Please state who owns the building and details of the Trustees:			
11.	Give a brief description of the area in which the church is set:			
12.	Briefly describe the current activities in the church buildings, including community involvement and use by other organisations which benefits the local community:			

13.	Give details of any additional use you hope for once the project is completed.		
14.	Are you a registered charity?	YES / NO	
15.	If yes, what is your Charity Number		
16.	If you are not a Charity, are you an excepted party? <i>(Most local URC and Congregational Churches are excepted parties and as such do not have a separate charity number)</i>		YES / NO
17.	Have you ever made a previous application to the Trust?		YES / NO
	If YES, please give details of any grants awarded by the Trust in the last 10 years:		

Section 2 – Project Details

18.	Briefly describe the project for which you seek funding:		
19.	What is the name of your Church Authority?		
20.	Does the proposed work have the necessary support of your appropriate church authority?		
	YES	NO	NOT REQUIRED
	If No, please indicate the reason why.		
21.	Are any of the buildings affected by the proposed work listed?		
	YES	<i>State listing, eg Grade 2</i>	
	NO		
22.	Is planning permission required and if so, has it been applied for or received? Please give indication of timings for planning.		
23.	What is the anticipated start date for the project?		

24.	What is the total cost of the project?	£
25.	What is the basis for the project cost, ie detailed quotations? Also give details of any professional advice the organisation has sought.	
26.	How do you propose to fund the project?	
27.	How much money has already been raised/awarded to the project?	£
28.	Please give details of grants and other funding already received or promised, indicating whether received or promised.	
29.	Please list any other funding bodies you are waiting to hear from.	

Section 3 Detailed Project Costs

Please set out full details of the costs involved in the Project for which you are applying for funding:

30.	Total Project Cost <i>(please provide breakdown below and ensure the estimates match the total project cost in Q.24. We suggest VAT is included in the project cost.)</i>			£
	Please state the estimated costs for:			
	Building work	£	Environmental work	£
	Electrical work	£	Plumbing work	£
	Heating	£	Painting & decorating	£
	Professional Fees	£	Contingency	£
	Sundries	£		
31.	Does the project have an environmental element, eg installation of renewable energy source, upgrade of thermal insulation, double glazing etc?			YES / NO

	If YES, please give details and costs as we also consider additional grant support for environmental work. Please continue on a separate sheet if necessary. Please ensure these figures are included in the appropriate box in Q.30.		
32.	In the case of a new building, state the estimated cost of the:		
	Site	£	Building
			£
33.	Have you used professional advisors at any state of the proposed work, eg Quantity Surveyor, Architect? <i>If so, please list below those you have consulted. Also indicate the expected fees for their work, as we will consider additional grant support for such professional help. Please ensure that these figures are included in the appropriate box in Q.30 (Professional Fees). Statutory fees for planning permission and building regulations should not be included in this section but can be added into Sundries at Q.30.</i>		
34.	If you have not used professional advisors, who has taken responsibility for the work?		

Section 4 Financial Information

35.	Financial Summary - please complete details below from the Church's annual report, full accounts and balance sheet and show prior year information.	
Year	20--	Prior Year
Income		
Expenditure		
Surplus / Deficit		
Cash at Bank (as per accounts)		
Investments (value of investments as per accounts including any third-party funds held for Church's benefit)		
Investments (income from investments as per accounts)		
Bank balances of all accounts in Church name as at date of grant application		
If the Church has restricted and/or designated funds please identify these and indicate their use.		

Are the funds raised to date included in the cash at bank? If not please indicate who holds the funds.
Do you operate a separate account for fund raising or building works and if so, please indicate the balance on the account at the date of application?
Have any of the funds raised to date already been spent and if so, how much? Please indicate why they have been spent.
Of the Church's current level of financial reserves, please indicate the value of funds to be allocated to this project.

Section 5 Additional Information

36.	Any additional information you wish to give to support your application including events that have had a significant impact on the church finances or operation since the date of the last accounts submitted:	
37.	How did you learn of the Congregational and General Charitable Trust?	

Signatory must be a responsible official, eg Treasurer, Secretary, Minister or Chief Executive			
Signature		Date	
Name in print		Position	

For your application to be considered you must include electronic copies of:	<i>Please indicate Yes / No to confirm details enclosed</i>
1. The signed application form	
2. The last two years' financial information for the Church or Organisation, including annual report, full accounts, balance sheet and details of any investments held.	
3. Documentary evidence of the costings for the work involved in the project	
It will also assist us if you can include any of the following:	
1. Publicity material for the project	
2. Any other documentation in support of your project	

Please send completed form to: Bea Walshaw, Trust Administrator, Congregational and General Charitable Trust, PO Box 1111, Lincoln LN5 0WJ or email documents to: admin@candgtrust.org.uk

If you require confirmation of our receipt of your application please indicate this in supporting email or letter with the application and provide an email address in Q7a. We prefer to correspond by email.

Data Protection

Your privacy is important to us. We will process your personal data in accordance with the applicable data protection law. The data controller in respect of the personal data which we may hold about you is Congregational & General Charitable Trust Limited who you can contact via the Data Protection Officer, at PO Box 1111, Lincoln LN5 0WJ or email enquiries@candgtrust.org.uk

When you submit this application form you agree that we will use this application form and the other information you give us, including any personal information covered by data protection legislation, for the following purposes:

- To process your application for grant funding and to decide whether or not to give you a grant. We may use your contact details to keep you informed about our work, (including by email, where an email address has been supplied), unless you have indicated that you would prefer not to receive information from us which is not connected to your application or grant.
- To hold in a database and use for statistical purposes.
- If we offer you a grant, we may publish information about you relating to the activity we have funded, including the amount of the grant and the activity it was for. This information may appear in our press releases, in our print and online publications, and other media.

If you do not provide us with the personal data that we require for your application then we may not be able to process your application for grant funding. Once a grant has been paid, we will keep such personal data as you have provided for the purposes of accounting, administration and record keeping on the basis that this is in our interests and will not affect your fundamental rights and freedoms. Otherwise we will only use your data for the purposes outlined in our Privacy Policy with your continued consent, which you may withdraw at any time by contacting the Data Protection Officer at the above address.

Further Information

For further information on how we manage data responsibly, please refer to our Privacy Policy at <http://www.candgtrust.org.uk>