**Please note that this is just an example form and should not be emailed to the Trust**

**Welcome to our Community Programmes Funding Application form**

We’re pleased to invite good causes to apply for our unrestricted multi-year funding. This funding is designed to offer flexibility and long-term support, so you can strengthen your organisation and deepen your impact. We're looking to support organisations whose core purpose and everyday work align closely with one of our funding themes. Thank you for the vital work you do—we look forward to learning more about your organisation.

This example application form will begin with the questions found in our eligibility checker. This can be found [here](https://postcodelottery.my.site.com/CommunityGrants/s/#Start) (link opens in new page).

For this you will be asked to input the following details:

* Postcode
* Income (needs to be between £10,000 and £1,000,000 to be eligible for this fund)
* Organisation type. Organisation types supported through this fund are:
	+ Registered charities
	+ Community Interest Companies (CIC’s) with an asset lock (Schedule 1&2 only)
	+ Community Benefit Societies
* Funding theme your organisation is applying under. Themes supported through this fund are:
	+ Enabling participation in the arts
	+ Preventing or reducing the impact of poverty
	+ Supporting marginalized groups and/or tackling inequality
	+ Improving mental health

**Privacy Statement**

We understand that applicants often have personal reasons for supporting or working with charities. However, please do not disclose such personal information on our forms. The personal data we require is limited to that which is specifically requested on the form which is used to identify you as the applicant on behalf of your organisation and your referees. We do not require any other personal information. Providing personal information will not assist your application and may result in it being rejected.

Application details will be shared with our due diligence partner organisation for the purposes of conducting due diligence checks on applicant organisations, Directors, and Trustees. They may utilise data held with Companies House, OSCR and the Charity Commission for an Experian background check. Our partner may be in touch with the main contact provided in this application for clarification purposes.

Application details will also be shared with Citizens UK Charity, who manage the Living Wage Foundation. This will allow us to report on whether organisations applying to the Trust are living wage employers and whether they pay the living wage to staff.

[ ]  \* I have read and understood the Information and Data Protection Terms (opens in a new window)

We want to understand a little bit more about your organisation, please ensure your organisation's name provided below, matches exactly to your governing document, accounts and bank statement.

What postcode do you work in? If you work across multiple areas, please us the postcode of your main area of work. We prioritise organisations that operate in the most deprived 15% of the Index of Multiple Deprivation.

**Postcode**

Please provide a valid UK postcode including a space. Eg “EH2 4ET”.

**What does this postcode represent?** E.g. Your office, the location of most of your activities, an area that the majority of your participants come from?

Max 255 characters

**Organisation Name**

**Organisation Address**

**Town**

**Postcode**

**About your organisation type**

[ ]  Registered Charity

[ ]  Community Benefit Society

[ ]  Community Interest Company (CIC) with an asset lock (Schedule 1&2 only)

**For charities registered with the Charity Commission in England and Wales or the Scottish Charity Regulator (OSCR) only**

**Who are you registered with?**

[ ]  Charity Commission (England and Wales)

[ ]  Scottish Charity Regulator (OSCR)

[ ]  Both

**Charity Commission Number** *(if applicable)*

**Charity Commission Charity Suffix** *(if your Charity Commission number does not have a suffix, please enter “0”)*

**Scottish Charitable Regulator (OSCR) Number***(if applicable)*

**What type of charity are you?**

[ ]  Registered Charity

[ ]  Charitable Incorporated Organisation (CIO)

[ ]  Scottish Charitable Incorporated Organisation (SCIO)

**Are you also registered with Companies House?**

[ ]  Yes, we are registered with Companies House

[ ]  No, we are not registered with Companies House

**Companies House Number** *(if applicable)*

**For Community Benefit Societies only**

**Financial Conduct Authority (FCA) Mutuals Public Register Number**

**For Community Interest Companies (CIC’s) with an Asset Lock (Schedule 1&2 only)**

[ ]  Community Interest Company (CIC Schedule 1) – Company limited by Guarantee

[ ]  Community Interest Company (CIC Schedule 2) – Company limited by Guarantee/Shares

**Companies House Number**

**Are there any for-profit companies affiliated with your organisation?**

*By affiliated we mean shared directors, staff, or similar services being provided*

[ ]  Yes

[ ]  No

**If yes, please provide details of the companies here and the nature of the relationship here.**

*Max 500 characters*

**General Eligibility Questions**
*These statements must all be true to be eligible to apply for funding through the Trust.*

**Have you read our Funding Guide?**

[ ]  We have read the Funding Guide and understand that this application will not be considered if the criteria are not met

**Governing document requirement**

[ ]  We have a governing document in the name of our organisation with clear charitable objectives/aims. For Community Interest Companies, your objects and/or CIC36 document must be included.

**Funds need to be spent in Great Britain**

[ ] We are based in Great Britain and understand all funds will need to be spent on activities in Great Britain.

**People**

[ ]  No more than 50% of Trustees/Directors/Committee members are related.

**Bank Account**

[ ]  We have a UK bank account in the exact name of the organisation that is applying, with two unrelated signatories. This is an account with a bank, not a Wise account, ANNA, MoneyCorp, or any other electronic money service.

**No outstanding review form**

[ ]  Our organisation does not have an outstanding review or evaluation form for a previous grant supported by players of People’s Postcode Lottery.

**Your work is not wholly restricted to the promotion of religion**

[ ] Our governing document has at least one object that is non-religious

**We have not funded you in the past 12 months**

[ ]  We have not received funding through any Postcode Trust within the last 12 months (this is counted from the date payment was received into your organisation’s account)

**Your organisation has been operating for over 1 year and has a set of signed accounts**

[ ]  Our organisation has been operating for 12+ months and we have a signed set of accounts that show both income and expenditure and have been audited/independently examined if required.

**Your organisation has all relevant policies in place at the time of this application.**

[ ]  Our organisation has all relevant policies in place (safeguarding etc)

**About your Safeguarding**

**Do you work with children or vulnerable adults?**

[ ]  Yes

[ ]  No

**If yes, do you have a Safeguarding / Vulnerable Adult Policy in place?**

[ ]  Yes

[ ]  No – If no you are unable to continue your application as we require your organisation to have this in place to be eligible to apply.

**If yes, when did you last review your Safeguarding / Vulnerable Adult Policy?**

**Do you have a procedure that clearly sets out the steps to take in the events of an incident or concern about a child or vulnerable adult?**

[ ]  Yes

[ ]  No - If no you are unable to continue your application as we require your organisation to have this in place to be eligible to apply.

**If yes, when did you last review your procedure that clearly sets out the steps to take in the events of an incident or concern about a child or vulnerable adult?**

**Who your organisation supports**

We’re interested in whether your organisation was set up specifically to support people from marginalised groups — for example, disabled people, people experiencing racial inequity, or LGBT+ people.

**Are your organisation's main activities focused on supporting people from a marginalised group, such as, but not limited to disabled people, people experiencing racial inequity, and LGBT+ people?**

[ ]  Specifically focused on one or more marginalised groups

[ ]  Open to all but not specifically focused on one particular marginalised group

[ ]  None of the above

**Which marginalised groups does your organisation primarily support? - ONLY SHOWS IF OPTION 1 is CHOSEN ON PREVIOUS QUESTION**

[ ]  Specifically supporting disabled people

[ ]  Specifically supporting people experiencing racial inequity

[ ]  Specifically supporting LGBT+ people

[ ]  Specifically supporting another marginalised group

**What other marginalised group(s) are your organisation's main activities focused on supporting? - ONLY SHOWS IF OPTION 4 IS CHOSEN ON PREVIOUS QUESTION**

**Has your organisation changed its legal structure (e.g. from a CIC to a Registered Charity) in the past 2 years?**

[ ]  Yes

[ ]  No

**Has your organisation been in operation for 12 or more months?**

[ ]  Yes

[ ]  No

**Do you have a set of signed accounts that have been audited/independently examined if required??**

[ ]  Yes

[ ]  No

We offer three-year funding for Registered Charities, Community Interest Companies, and Charitable Community Benefit Societies with an annual income between £10,000 and £1 million and we will prioritise organisations with an income of £250,000 or below.

In order to consider your application, the figures you provide below must match those in your annual accounts.

**What was your organisation's total income in the last financial year? This must be from your most recent set of full accounts that have been signed off by Trustees/Directors, and if required Auditors/Independent Examiners**

**Do you have a social media handle?**

☐ Yes

☐ No

**If yes, what are your organisation’s social media handles?**

**Do you have a website?**

☐ Yes

☐ No

**If yes, what is your organisation’s website?**

**If you do not have an online presence, what is the reason for this and where is the best place to see evidence of your work? (skip if you have provided a website or social media handle)**

Max 500 characters

**Is your organisation an accredited Real Living Wage Employer?**

[ ]  Yes

[ ]  No

**If you are not an accredited Real Living Wage Employer, please explain why.**

Max 255 characters

**Does your organisation have a reserves policy?**

[ ]  Yes

[ ]  No

**If yes, please provide details of the policy and whether you are currently in line with it.**

**If no, why do you not have a reserves policy?**

**What are your current reserves?**

This should be your free reserves, and/or reserves designated for staffing costs.

**Has your organisation incurred any significant losses or debts in the last 3 years?**

[ ]  Yes

[ ]  No

**If Yes, please provide details of any losses incurred in the last 3 years or any significant debt. This should include an explanation of any actions taken to mitigate losses, and any repayment arrangements for debts.**

**What are your current funding challenges? We’re looking for details that go beyond general phrases like “cost of living crisis” or “impact of COVID.” Instead, please provide detail of the circumstances around these issues, and the specific impact they are having on your organisation.**

Max 750 characters

**These details are used as part of our Due Diligence process. Please ensure that all relevant regulator records have also been updated to reflect any recent Trustee changes**

**How many Trustees does your organisation have?**

*Please enter a number. To be considered for funding no more than 50% of Trustees/Directors/Committee members can be related*

**Please provide the full names of each of your Trustees.**

**Are any of your Trustees, Directors, or Committee members related (for example, by family marriage, civil partnership, or long-term cohabitation?**

[ ]  Yes

[ ]  No

**If yes, please provide details about the related Trustees, Directors, or Committee members.**

**How many paid employees does your organisation have?**

We offer unrestricted funding to give organisations the flexibility to use our support where it’s needed most. However, we will only consider applications where the organisation’s core purpose and main activities closely align with one of our funding themes. We’re looking to support organisations that are primarily set up to work in these areas, rather than an isolated project that is part of an unrelated portfolio of work. Please ensure your application reflects this.

**Please select the theme that best fits with your organisation’s main purpose.**

[ ]  Enabling participation in the arts

[ ]  Preventing or reducing the impact of poverty

[ ]  Improving mental health (please note: we will only fund organisations that are actively supporting mental health issues, not general mental wellbeing activities)

[ ]  Supporting marginalised groups and/or tackling inequality

**What is your organisation’s mission?**

Tell us what your organisation is here to do — your core purpose. This should include the community or group you support and the issue or need you address. You don’t need to copy and paste a formal mission statement (unless it fits!). Just explain your purpose in a clear, straightforward way.

Max 1000 characters.

**Please describe your core services or activities – by this we mean the activities that you carry out to achieve your overall objectives.**

As this is an application for unrestricted funding, we want to hear about all of your current activities rather than a specific project or strand of your work. Organisations whose overall activities closely align with the chosen theme will have a stronger chance of being successful.

Max 1000 characters

**How do you engage with your community to make sure you meet their needs? Please also include how you put your findings into practice.**

By community, we mean your local community that you service which includes your service users.

Max 750 characters

**We now want to gain an understanding of your leadership team. By this we mean the key decision-makers within your organisation—those responsible for setting direction, making strategic choices, and overseeing day-to-day operations. This could include senior staff, trustees, founders, or others who play a central role in shaping and leading your work**

**Have there been any significant changes in leadership in the last year? By significant we mean more than 50% of Trustees/Directors changing, or changes to your senior management team.**

[ ]  Yes

[ ]  No

**If yes, please explain the circumstances and impact this has had on your organisation.**

Max 500 characters

**Please tell us about your leadership team and how they are best placed to make a difference in your organisation. Are they reflective of your service users or do they have a specific skill set or level of experience? Please also explain why this is beneficial to your organisation.**

Max 750 characters

**You are applying under the [X] funding theme. What impact has your organisation had towards this so far?**

We’re looking for a clear picture of the difference your work has made in your community. If you can, include what has changed as a result of your activities, rather than just what activities were delivered.

Max 750 characters

**THE NEXT QUESTION ONLY APPEARS IF YOU INDICATED EARLIER IN THE FORM THAT YOUR ORGANISATION SPECIFICALLY SUPPORTS MARGINALISED GROUPS**

**Please provide detail on how your organisation’s activities support the selected group(s). If more than one is selected, provide detail for each one. Whilst we appreciate you organisation aims to be inclusive for all, please only include details where your organisation is specifically supporting one of the above groups.**

Max 750 characters

**How much funding are you requesting from the Trust?**

The maximum you can request is £X in total over a three year period. If your application is successful, you will then be asked how you want to split the total award over three years. Please note, you will not be able to take more than 50% of the total amount requested in any 1 year.

**Supporting Documents**

**The form will ask you to submit the following documents.**

**Governing Document**

This should clearly show your organisation’s objects. An asset lock and dissolution clause should also be present. Failure to upload the correct documents will render your application ineligible.

**Latest Signed Accounts**

The attached accounts must show income and expenditure for a full financial year. They must be signed by a Trustee or Director, and an Independent Examiner and/or Auditor if required. These accounts must be no older than year ending October 2023.

**What is the end date of the financial year in these accounts?**

**Management accounts (only required if the end date on your accounts is before July 2024)**

If the end date of your accounts is before July 2024, please also upload management or draft accounts/an explanation for the interim period so we can understand the current financial health of the organisation

**Safeguarding policy (only required if your organisation works with children or vulnerable adults)**

Only requires submission if your organisation has previously indicated on the form that you work with children or vulnerable adults.

**Bank Statement.**

This must be dated from the last 90 days and have the name of your organisation clearly visible. Please note, we only accept bank accounts and not Wise accounts, ANNA, MoneyCorp, or any other electronic money services. If we assess your application and you do not have an UK bank account that meets our criteria, your application will not be eligible.

**File types: We only accept the following file types:**

* PDF documents with the extension ".pdf"
* Images with the extensions ".jpg", ".jpeg" or ".png"
* Word Documents with the extensions ".doc", ".docx" or ".odt
* Spreadsheets with the extensions ".xls", ".xlsx" or ".ods"
* Powerpoint presentation with the extensions ".ppt", ".pptx" or ".odp"
* We do not accept archive files (eg. Zip files).

Very large files (larger than 10 MB or 10,000 KB) can cause errors when uploading. These tend to be scanned PDF files.

**Main Contact Details**

We will use these details to contact you as the applicant and lead for the funding. You will receive an email to this address following the successful submission of this form.

**First Name**

**Last Name**

**Email Address**

**Phone Number**

**Mobile Number**

**Do you have somebody we can contact in instances where the main contact is unreachable?**

[ ]  Yes

[ ]  No

**If yes, please provide Secondary Contact details**

**First Name**

**Last Name**

**Email Address**

**Phone Number**

**Mobile Number**

**Referees**

**We require the details of two contactable referees for your organisation.**

**These can be from any of the following:**

* **A partner organisation that you have worked with**
* **A funder of a project that you have delivered**
* **A contact at your local authority**
* **A contact from a third sector support organisation**

**These cannot be:**

* **A member of your organisation, including a Trustee**
* **A third party confirming on your referee’s behalf**
* **Someone that does not know you (the applicant)**

Referees must be contactable using the details provided in order for us to make a prompt assessment. Contact will be made within four weeks of your submission. Please ensure that you obtain prior consent from both referees before including them in the form.

**Referee 1**

**First Name**

**Last Name**

**Job Title**

**Email Address**

**Phone Number**

**Referee 2**

**First Name**

**Last Name**

**Job Title**

**Email Address**

**Phone Number**

**How did you hear about our funding opportunities?** *(Select one)*

[ ]  Funding workshop/Local MP

[ ]  Press

[ ]  Another organisation

[ ]  A Player of People's Postcode Lottery

[ ]  From a previous applicant

[ ]  I am a previous applicant

[ ]  Web/Internet search

[ ]  Grants/organisation Newsletter

[ ]  A local Community Voluntary Service (CVS)

[ ]  Social Media

[ ]  Other

**If Other, please specify**

**Direct Marketing**

**If you would like to receive updates by email from People's Postcode Trust and / or information on future funding opportunities, then please tick the boxes below.**

*You are not required to complete the direct marketing form. The funding application is not reliant on you completing the direct marketing form. If you do not wish to complete the form please leave blank.*

[ ] News

[ ] Events

[ ] Future Funding Opportunities

**Help us learn about our applicants**

We would like to ask some questions about the people being supported and your organisation, to help us to understand our applicants and funding better.

This information is being used to inform our own monitoring and strategy and will not be used as the basis of individual funding decisions. You answers will not be used as part of our assessment process.

**Is your organisation led by one or more of the following population groups?**

[ ]  Communities experiencing racial inequity

[ ]  People with disabilities

[ ]  Faith communities

[ ]  LGBT+ people

[ ]  Migrants

[ ]  Older people

[ ]  Younger people

[ ]  People who are educationally or economically disadvantaged

[ ]  Women and girls

**Does your organisation support, one or more of the following population groups?**

[ ]  Communities experiencing racial inequity

[ ]  People with disabilities

[ ]  Faith communities

[ ]  LGBT+ people

[ ]  Migrants

[ ]  Older people

[ ]  Younger people

[ ]  People who are educationally or economically disadvantaged

[ ]  Women and girls