

Big Change That Lasts Fund - Stage 1

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Section 1 - Eligibility

You can use the page numbers at the top of the screen or the buttons at the bottom to move between pages. Before completing this form please make sure you have read our [guidance](#).

If you have any communication support needs that make reading or completing an application form difficult or impossible, please get in touch with us at programmes@therobertsontrust.org.uk or call us on 0141 353 4321 to discuss alternative ways you can apply.

This form works best when using Chrome or Microsoft Edge. You may experience issues if you are trying to complete this form using a tablet or Apple Mac and we would advise using a computer/laptop where possible. Please also see our [Guide to Completing Our Online Application Forms](#).

Do you have independently examined or audited Annual Accounts? *

Yes

No

We will ask for a copy of these later in the form. If you are a newly registered organisation which has not yet produced its first set of Annual Accounts, we are unlikely to consider your application. We may, however, make allowances in exceptional circumstances. If you would like to discuss this please with a member of the team please get in touch with us at programmes@therobertsontrust.org.uk.

Does your organisation have an annual income of £200,000 or more OR has your income been an average of £200,000 or more over the past 3 years? *

Yes

No

This fund is only open to organisations with an annual income of £200,000 or more. This is normally based on the money your organisation received in the last financial year, as shown in your most recent Accounts. We understand that organisation's income may fluctuate from year to year so we will look at the average of your income over the last three years, as shown on OSCR or Companies House. In exceptional circumstances we may consider applications from organisations with income under this threshold, however this is likely to be by invitation only.

Does your organisation have a minimum of three unconnected Trustees or Directors? *

Yes

No

By unconnected we mean these people should not be related; married or in a civil partnership with each other; in a long-term relationship with each other; or living together at the same address.

Does your work involve children, young people or vulnerable adults? *

Yes

No

Does your organisation have a policy on Equality, Diversity and Inclusion that ensures everyone has access to the same opportunities and the same fair treatment? *

Yes

No

We need to know that your organisation has a written agreement detailing how you will avoid discriminating against people, and how you will create a safe and inclusive atmosphere both within your workplace and for the people you support.

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Section 2 - About your Organisation

Organisation Name *

Please provide the name of your organisation as it is formally registered.

Organisation Legal Structure *

Please select the option that best fits your organisations legal structure. If you are a housing association which is also registered with OSCR, please select Charity.

Organisation Address

Please provide the address your organisation is registered at.

Street Name & No *

Town/City *

Local Authority *

Postcode *

Telephone

How many employed staff and volunteers does your organisation have? Please do not include Board/Committee members as volunteers.

Number of full-time staff: *

Number of part time/seasonal staff: *

Number of volunteers: *

Are any of your Trustees or Directors also paid members of staff?
*

Yes

No

By paid members of staff, we mean Trustees or Directors who are employed by your organisation and receive a salary.

Please provide details of your organisation's income and expenditure from your most recent set of Accounts:

Year: *

 

Please enter the year-end of your most recent Accounts.

Income: *

£

Please enter your total annual income using only numbers and to the nearest thousand.

Expenditure: *

£

Please enter your total annual expenditure using only numbers and to the nearest thousand.

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Section 3 - About your Work

Please provide a brief description of your organisation's work *

Please tell us, in your own words, what your organisation does and who it supports, including any specific groups of people you work with. Please also tell us about the main projects, activities or services you provide on a regular basis, how long you have been providing these and whether you have any plans to change these in the next 12 months.

Which of The Robertson Trust's thematic areas will your work primarily address? *

Please select...▼

For the Big Change That Lasts Fund, we are currently inviting applications that focus on delivering big change that lasts under our Financial Security theme. Details of our current priorities for this theme are provided in our [guidance](#).

Does your work aim to address any other thematic areas?

- Financial Security
- Nurturing Relationships
- Education Pathways
- Work Pathways

Please select all that apply.

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Section 4 - Project Proposal

Before completing this section, we strongly recommend you read the full [guidance](#) notes for the fund, which includes additional information on the questions below and what we're looking for.

Project name *

25 word limit

Please tell us, in no more than 25 words, the name of your project.

How much are you seeking from us in total? *

£

Please confirm the total amount of funding you would like from us for the full funding period requested. Please provide a figure to the nearest thousand and enter only numbers. For example, if you are requesting £50,000 per year for three years, you should enter 150000.

What is the timescale for the proposed work? *

Please select...



Please tell us the number of years over which you expect the proposed work to be delivered.

Project location *

Please select...

Scotland Wide

Aberdeen City

Aberdeenshire



Please select all that apply, up to a maximum of 6. If more than 6, please select Scotland Wide. To select more than one local authority hold down the Ctrl button and click on all those that apply.

Type of project *

- Feasibility/Development (*work to develop ideas with strong potential for change at scale*)
- Test & Demonstration (*work to test and demonstrate new approaches to services and work that can reduce poverty and trauma in Scotland*)
- Advocacy, Campaigning/Influence (*to change policy, practice, attitudes, and behaviours*)
- Research (*we are not a research funder, but we will fund research where it is solutions-focused, applied and clearly and demonstrably connects to action to delivery change*)

Please select all that apply.

Proposal summary *

300 word limit



Please provide a brief summary of the project you are applying for. It should be clear what the aims and objectives of the work are and what you intend to do, including the main activities and outputs.

Preventing and reducing poverty and trauma *

300 word limit

Please tell us why you think this work is needed? What is the issue, related to our focus on Poverty & Trauma, that you are seeking to address? Why is there a need to address this now? Why is this work needed in the geographical area of focus? Who will the project support?

Delivering big change that lasts *

300 word limit

Through this fund we are most interested in projects that can tackle some of the systemic and structural factors that underpin Scotland's current levels of poverty and trauma. Please use this section to outline how your project would aim to deliver big change that lasts in Scotland in relation to poverty and trauma. Please clearly highlight the impacts/changes you want to achieve by the end of the project, and what you see as some of the potential routes to achieving this change.

Maximising impact through influencing, engagement and/or collaboration *

300 word limit

Please outline the other individuals and organisations you would hope to involve (formally or informally) in maximising the impact of this work, the coalitions of support you have, and organisations you would bring together to help achieve your ambitions. Please also outline how you currently involve experts by experience in your organisation and/or what opportunities there may be for experts by experience to work alongside this project.

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Section 5 - Contact Information

Organisation Contact

This contact must be a Trustee/Director **OR** someone authorised to apply on behalf of the organisation. Their details will be used as a contact point for all automated emails from The Robertson Trust, including confirming receipt of the application and our final funding decision.

The organisation and application contacts provided must be different.

First Name *

Last Name *

Position within the organisation *

Telephone *

Email *

The organisational contact has given consent for their details to be used within the application and associated processes. *

Yes

Does this contact have any communication support needs we need to know about? *

Yes

No

Application Contact

This is the person we will contact with any queries about the application and who we expect to be the main point of contact throughout the assessment process.

If there is a chance that they might not be available for an extended period during the assessment timeframe, you may wish to consider nominating another person.

Their details will be used as a contact point for all automated emails from The Robertson Trust, including confirming receipt of the application and our final funding decision.

This contact **MUST** be a different person to the Organisation contact noted previously.

The organisation and application contacts provided must be different.

First Name *

Last Name *

Position within the organisation *

Telephone *

Email *

Does this contact have any communication support needs we need to know about? *

Yes

No

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Section 6 - Supporting Documentation

Please upload your Accounts here *

Choose File No file chosen

Please provide full (not abbreviated) Accounts which have been independently examined or audited.

If you are having trouble uploading files, you can email them to us at

programmes@therobertsontrust.org.uk. Please tell us your organisation's name and provide your application reference number, if you have one.

If you are unable to send us this form as a result of issues uploading files, you can upload a blank word document instead and email us the paperwork, which we'll attach to the application for you.

Please use this space to provide additional information about the Accounts (or Management Accounts) you are providing in support of this application

It is helpful for our assessment if you can tell us here about:

- any one-off or unusual items in the accounts provided which would not normally feature on a year-to-year basis;
- any large surplus or deficit recorded during the financial year;
- high levels of Net Current Assets - if these are close to, or in excess of, your annual expenditure, it would be helpful to know if this is linked to increased planned expenditure in the next financial year;
- any investments listed - it is useful for us to know whether these are property based, or whether your organisation could access them relatively quickly to meet expenditure needs.

If you are a UK wide Charity, please provide information on income and expenditure for your Scottish operations, if available.

Please also attach any other documentation relevant to your application, or which has been requested by a member of the team as part of any enquiry before applying. If your Accounts are over 12 months old, please provide a copy of your recent Management Accounts.

Community Interest Companies must also provide:

- A copy of your Governing Documents, i.e. Articles of Association.**
- A copy of your CIC 34 report for your latest Accounts.**

If you are a College or University please also send us Management Accounts and a budget for the department applying for funding.

Choose File No file chosen

Would you like to attach another file?

Yes No

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Section 7 - Contact with The Robertson Trust

If this is your first application to the Robertson Trust, how did you hear about us?

- Funding Event*
- The Robertson Trust Making an Application Workshop
- The Robertson Trust Website
- Word of Mouth
- Local Authority Funding Officer
- Third Sector Interface**
- Media
- Other
- Don't Know

* This could be a local authority funding fayre, Robertson Trust event or another funders' event

** Third Sector Interfaces (TSIs) provide a single point of access for support and advice for the third sector within local areas. There is a TSI in each local authority area in Scotland.

Have you spoken to a member of the Programmes Team before applying *

Yes

No

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Section 8 - Terms and Conditions

By making an application to The Robertson Trust, you acknowledge that you are authorised to apply on behalf of your organisation and agree to the following terms and conditions:

Use of data:

1. Your organisation unconditionally authorises The Robertson Trust to:
 1. Retain, store and use the information you give us in your application and future reporting for administration, analysis, research and promotional purposes;
 2. Publish details of any financial or non-financial support given to your organisation;
 3. Pass any details obtained about your organisation through this application or through subsequent assessment procedures to external agencies, including other grant-making bodies;
 4. Use such information as part of any survey undertaken by The Robertson Trust and/or use any such details as part of any press release or publication without the need

at any time to obtain the further consent or agreement from your organisation.

Use of funds:

1. If awarded funding, the grant will be spent on only the purposes approved by The Robertson Trust, and only by the organisation to which we awarded funding;
2. The grant will not be paid until you have provided your bank details, a copy of a bank statement/letter no older than three months and you have met any other specific conditions of release, as detailed in your award email or welcome pack.
3. The grant period commences upon release of the first payment. Each year normally runs for a period of 12 months from the date of release.
4. Any instalments of the grant must be used within 12 months of release unless discussed with your Programmes Officer.
5. Progress report processes will be discussed with your Programmes Officer and outlined in your Welcome Pack.
6. We reserve the right to contact and/or visit you to see the funded work during the life of the grant.
7. You will inform us, in advance where possible, of any significant change to the funded work, proposal or your organisation throughout the funding period (even if you have not yet drawn down the grant). A 'significant change' includes:
 1. a consequential change to your grant expenditure;
 2. any change in your organisation's legal status or constitution;
 3. any significant operational changes within the organisation that are likely to affect the funded work;
 4. any serious financial or governance issue facing your organisation;
 5. any safeguarding concern raised about your organisation, its staff or volunteers;
 6. any underspend of our award.
8. If you are not sure whether you need to let us know about an issue or change within your organisation or the funded work, please contact your Programmes Officer or email programmes@therobertsontrust.org.uk.
9. You will inform us of any concerns regarding your organisation raised with OSCR (Scotland), the Charity Commission (England and Wales), Companies House or Community Interest Company

Regulator during the lifetime of our grant. A list of concerns which OSCR can investigate are listed [here](#).

10. Any underspend of our grant must be declared to us and may be refunded/repaid to The Robertson Trust.
11. We reserve the right to withhold a grant or require repayment if:

1. You have deliberately falsified information as part of your application or reporting;
2. The work undertaken is not the work for which the funding was approved and where we have not approved these changes;
3. Your organisation becomes insolvent or goes into administration, receivership or liquidation and the funding has not been spent on its intended purpose.

We will sometimes apply additional conditions to an individual grant and will outline these in your Welcome Pack.

Where the application and grant are made electronically, the agreement between us shall be deemed to be in writing and your online acceptance of these Terms and Conditions shall be deemed to be a signature to that agreement.

You are authorised by your organisation to make this application and accept the Terms and Conditions set out above on its behalf.

*

I Agree

To the best of your knowledge, all the information you have provided in your application gives a true and accurate account of your organisation's work and needs. *

I Agree

Once you have completed the form and are ready to send it to us, click the 'send' button below. You will then be shown a preview of your completed form, which you can review to ensure you are happy with your responses. You can also print a copy of the form by clicking the 'print this page' button at the bottom of the next page.

When we receive your application, we will email you a link to an **online copy** of your completed form. If you require a paper copy, application for your records, you should print a copy of this now

Once you are happy with your responses and have printed a copy of the form, if required, hit 'confirm' to send us the application form.

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