

Large Grants Application Form

Guidance

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 Large grants [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 funding@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

PLEASE NOTE THIS IS A SAMPLE APPLICATION FORM – WE HAVE LINKED TO THIS FORM TO ENABLE APPLICANTS TO SEE QUESTIONS BEFORE STARTING AN APPLICATION. THE FULL APPLICATION FORM IS LINKED TO WITHIN THE [GUIDANCE](#)

Does your organisation have a minimum of three unconnected Trustees?

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

If yes, do you have a policy document which sets out how you will keep them safe?

Yes No

If your work involves children, young people or vulnerable adults we need to know that you have policies in place to keep them safe. We might also ask to see these.

Does your organisation have a policy on Equality, Diversity and Inclusion that ensure 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.

About your organisation

Organisation name

Please provide the name of your Charity as registered with OSCR or the Charity Commission.

Charity number

Please provide your Charity number as registered with OSCR or the Charity Commission. If you are a Scottish Charity, please enter this in the format SC012345.

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.

No. of full time staff

No. of part time/sessional staff

No. of volunteers

How many people on your board and/or senior staff share similar experiences to the community you support?

Choose an item.

Pick from one of the options below:

- **Most people** (at least 75% of your Board/Management Committee and/or at least 50% of senior staff who report directly to your Board).
- **Around half** (50% of your Board/Management Committee and one person who reports directly to your Board).
- **A small number** (one or two people on your Board/Management

Committee).

- None

- I don't know

We will not use this information for assessment purposes. We are interested in understanding the profile of the organisations we fund and will report on this figure annually as part of our Equity, Diversity, Participation and Rights ([EDPR](#)) [Commitment](#).

Are any of your Trustees also paid members of staff?

Yes No

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

If yes, please provide details below and tell us how your organisation manages this.

Please tell us their name(s), position within the organisation and their role on the board, e.g. Chair. Do you have a conflict of interest policy in place? Please also tell us about any plans to change your Board structure, for example if the post holder will be stepping down as a Trustee.

Please provide details of any memberships or accreditations that your organisation holds. This could include registration with the Care Inspectorate; SQA accreditation centre approval; or other accreditation such as 'Investor in People' Awards.

We are also interested to know if you provide either the Real Living Wage or Living Wage to your staff and, if not, what barriers prevent you from doing so.

About Your Work

Please describe a brief description of your organisation's work.

500 word limit

Please tell us, in your own words, what your organisation does and who it supports, including any specific groups of people you work with. It would be helpful if you can also give us an indication of the number of people supported

directly in the past 12 months. Further information on the types of work we are looking to fund through our Large grants can be found in our [guidance](#). 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.

Tell us about how you work with other organisations or groups in your area.

300 word limit

Please tell us how you work with others to deliver services, or change how services are delivered for people experiencing poverty and trauma. Examples of this may include: receiving referrals from other organisations/groups, making onward referrals to other organisations for further or more specialist support, formal or informal partnership working on projects, representation on the working groups of other organisations and local/regional networks. If you plan to deliver your work in a formal partnership or consortium with other Charities and would like to discuss how this might be supported by the Trust, please contact us at funding@therobertsontrust.org.uk.

How do you involve the people you support in the development and delivery of your work?

300 word limit

Examples of this might include: gathering feedback through regular chats with the people you support, in person or on social media; using surveys to gather views and taking action on this. Also, how you encourage and support members of the community to directly influence your work as volunteers, members of staff, or by joining your Board and steering groups. We are particularly interested to know how you involve people from diverse communities (for example disabled people or people experiencing racial inequity) and remove barriers to their participation. We welcome examples of how this approach has brought added value to your organisation.

About your request

If your services/activities will be delivered in any local authority area(s) outwith where your organisation is based, or across multiple local authority areas, please select all that apply from

the list below, up to a maximum of 6. If more than 6, please select Scotland Wide.

Choose an item.

To select more than one local authority hold down the Ctrl button and click on all those that apply.

Are you applying for:

- Unrestricted funding
- A project, service or salary costs

We welcome applications for unrestricted funding which can be used towards the core running costs of your organisation, but we can also consider the costs of projects and salaries if this will better meet your needs.

If applying for Unrestricted Funding:

What will unrestricted funding enable your organisation to do?

700 word limit

Please tell us if unrestricted funding will simply enable you to continue your current core service delivery, or if you expect your work to evolve or expand over the next few years.

If applying for Project, service or salary costs:

Please tell us about the project activities, services or salary costs you are asking us to fund

700 word limit

Please tell us if the project, service or salary you are asking us to fund is new or existing. If you are applying for the costs of a specific salary, please also provide us with a job description for the post which confirms what the role will involve/what services the postholder will deliver. If you are applying for the costs of a project or service, tell us what this will involve, where and how often it will take place, who will deliver the work and who will participate/benefit directly from the work.

What is the evidence of need for this work?

700 word limit

Please tell us how your organisation's work helps to support people experiencing or at risk of experiencing poverty and trauma. Give examples of the issues people using your services face and tell us about how the support or activities you provide contribute to addressing these issues and/or prevent them from reoccurring. We want to support organisations which take a relational approach to their work, treating people as individuals and focusing on the key principles of fairness, dignity and respect. Please also explain here how your organisation does this in its work.

What outcomes/differences do you hope your work will contribute to for the people you support?

500 word limit

We want our funding to help reduce and prevent poverty and trauma in Scotland. To help us achieve this, we need to understand what differences our funding is helping to make for individuals, families and/or communities. These differences are sometimes called outcomes or impact. By knowing what differences you hope to achieve through your work, it will help us to see how your proposed work aligns to our own strategy. For organisations reapplying for funding under the Trust's current strategy, please tell us what impact your work has had to date during your current or recent period of funding, and whether the work towards which you are seeking funding is a new development or a consolidation of that previously funded.

How will you know if you are making those differences?

500 word limit

We want to know what monitoring and evaluation plans you have in place which will help you to track and understand what differences your work is contributing to for individuals, families, communities or systems, and what factors in particular is leading to those differences. The information you gather should include a mixture of numbers and stories and might involve carrying out surveys, interviews, observations, or any other way that you think will show what differences your work has helped to make. If your application is successful, we will ask you to include this information in your End of Year and End of Grant reports. We also hope that you will use the information you

gather to make continuous improvements to your work and ensure you are having the biggest impact that you can.

Budget

How many years funding are you requesting?

Choose an item.

The majority of our Large grants are for 3 years. In exceptional cases we can consider up to 5 years' funding for work which is most clearly and directly aligned to one of our funding themes and at least one of the priorities listed under that theme, and which is also recognised as leading or best practice. Please see Large grants [guidance](#) for further information. You can also request funding for a shorter period. If successful, your funding year will run for 12 months from the date we pay your award. In most cases this will be different to the dates of your financial year.

Please provide a fully costed budget for this work, using our [budget template](#).

As our revenue awards are released annually, each column year should represent a full 12 months' expenditure.

Please try to include all the associated costs of your planned work and not just those you are requesting from us. Group expenditure under summary headings, e.g. travel costs, volunteer expenses, rent/utilities. Small items of capital expenditure, e.g. equipment or materials costs, can also be included.

If applying for salary costs, please provide details of each salaried post individually and include NI and employer contributions in the total salary cost for each. For sessional staff, please provide the total cost of this under one summary heading. You can also include a proportion of your day to day running (core) costs for project specific requests and should list this as a separate item of expenditure. If you expect costs to increase year on year, e.g. due to salary increments or inflation, please show this in your budget.

How much would you like from us in total?

£

Please confirm the total amount of funding you would like from us for the full funding period requested, which should be between £20,000 and £50,000 per year. Please provide a figure to the nearest thousand and enter only numbers. For example, if you are requesting £40,000 each year for three years, you should enter 120000. Please note that we are planning to move towards making fewer, but higher, levels of grants. While grants of £50,000 per year will be available, these will be for work which is most clearly and directly aligned to one of our themes and at least one of the priorities listed under that theme, and which is also recognised as leading or best practice. For higher levels of funding, we are particularly interested in work which is preventative, and which has the potential for contributing to long-term change in addressing poverty and trauma.

Organisation contact

This contact must be a Trustee and 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.

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

If yes, please tell us how we can support you during the assessment of your application

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

Yes

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 standard 10-12 week 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 application contact provided must be different to the organisation contact above.

The emails provided on this form 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

If yes, please tell us how we can support you during the assessment of your application**Accounts****Do you have independently examined or audited Annual Accounts?**

Yes No

If your accounts are more than 12 months old, please also provide a copy of your recent management accounts in the section below. If you are a newly registered Charity and haven't yet produced Annual Accounts we can still consider your application and will ask you to provide details of an independent referee and a recent copy bank statement dated within 3 months. Please also send us a projection showing your organisation's expected income for its first year.

Please upload your accounts.

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.

If you do not have independently examined or audited Annual Accounts, please upload a copy bank statement for your organisation which is less than 3 months old.

Independent Referee

If you do not have independently examined or audited Annual Accounts, please provide details of an Independent Referee below.

This should be someone who knows the work of your organisation but is not directly connected to it. This might be a local community worker, MSP or Councillor, teacher, health professional or someone from your local Third Sector Interface.

Having someone from your community vouch for your work lets us know that you are well linked in within your local community and are known to others.

We may contact the independent referee as part of the assessment of your application or during the period of any funding we award. Please make sure you have permission to provide their details and that they are happy for us to contact them. We will store their details until any grant we award comes to an end.

Forename

Surname

Organisation

Position within the Organisation

Email

Phone

Supporting documents

Please also attach any other documentation relevant to your application, for example a job description if you are asking for funding towards a specific post, management accounts or, if you are a newly registered charity, a projection showing your organisation's expected income for its first year.

If you are having trouble uploading files, or need to send us additional documents, you can email them to us at onlineapplications@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, please call us on 0141 353 4321.

Is there anything else you want to tell us about this application or any attachments you are providing which has not been covered previously?

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.

Grant 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:

2. 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;
3. Where the grant is unrestricted, this money can be used towards any of the day to day operational costs of the organisation;
4. 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 Grant Welcome Pack.
5. The grant period commences upon release of the first payment. Each grant year runs for a period of 12 months from the date of release.
6. Any (annual) instalment of the grant must be used within 12 months of release.
7. You will send us a progress report if documented/requested in your Grant Welcome Pack.
8. We reserve the right to contact and/or visit you to see the funded work during the life of the grant.
9. You will inform us, in advance where possible, of any significant change to the funded work, proposal or your

organisation throughout the grant period (even if you have not yet drawn down the grant). A 'significant change' includes:

1. a consequential change to your grant's expenditure;
 2. any changes in postholder or to their role/hours/salary costs;
 3. any change in your organisation's legal status or constitution;
 4. any significant operational changes within the organisation that are likely to affect the funded work;
 5. any serious financial or governance issue facing your organisation;
 6. any safeguarding concern raised about your organisation, its staff or volunteers;
 7. any underspend of our award.
10. 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 Funding Officer or email funding@therobertsontrust.org.uk.
11. You will inform us of any concerns regarding your organisation raised with OSCR (Scotland) or the Charity Commission (England) during the lifetime of our grant. A list of concerns which OSCR can investigate are listed [here](#).
12. Any underspend of our grant must be declared to us and may be refunded/repaid to the Robertson Trust.
13. 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, but these will be included in your Grant Welcome Pack.

Where the application and grant award 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

We may, very occasionally, wish to share relevant updates and learning with the organisation we fund. Please let us know, using the check boxes below, whether you are happy to receive this information. Please note you do not have to give your consent in order to apply. The Robertson Trust is relying on your consent in order to share this information with you. You can unsubscribe at any time by emailing us at dataprotection@therobertsontrust.org.uk

I Agree

I do not 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.