



## Guidance for completing a grant application

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Basic information to assist you in completing an application form for a CRSWS Grant follows. We encourage anyone considering applying for a Grant to read this guidance before completing an application.

### GRANT APPLICATION FORM

#### What is the application form?

The Grant Application Form is the means by which applicants can communicate with CRSWS Trustees. Put quite simply, it is the method of telling us who you are, what you are doing, what you need the money for, and generally presenting your case for our support.

#### Making a successful application

There is no right or wrong way to make a grant application, but it is possible to increase your chances of successfully securing a grant by taking the following aspects into account:

1. Demonstrate a need for your project<sup>1</sup> or item of equipment.
2. Show that your project is well planned.
3. Accurately cost your project or item of equipment.
4. Provide evidence of good management.
5. Illustrate how your project will make a difference.

#### 1. About you and/or your organisation

This part of the form asks for information about you or, where a charity or company is the applicant, your organisation. Completion of this section of the application form will help the Trust determine whether you are able to receive CRSWS funding.

Whether the applicant is an individual, a small group or an organisation, we shall want to see evidence of good management and that you or your organisation is capable of delivering your project. It is extremely important that you have efficient procedures for the handling of finances (i.e. a good

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<sup>1</sup> The word 'project' is used throughout our documentation. A project can mean anything from a scheme, item of equipment, service or a course of action you have plans for. It can also mean an activity you plan on delivering.

bookkeeping system and properly prepared accounts) and that you can provide evidence that you will be able to account for the money that is given to you.

Any organisation considering making an application for a grant, is also asked to supply the following information to support their application:

- A copy of your Governing Document (e.g. constitution, memorandum and articles of association, trust deed or other formal document)
- A copy of your most recent audited or accountant verified accounts
- Copies of your last three bank statements.

We expect such an organisation to have a governing committee of three or more non-related and non-cohabiting members and have suitable governance controls to manage a CRSWS grant.

### **Are you eligible to receive funding?**

CRSWS can make awards to organisations that have a written constitution, memorandum and articles of association, or other formal document setting out the organisation's aims and how it operates. We can also make awards to individuals who can demonstrate through their application that they can meet CRSWS objectives.

CRSWS cannot fund organisations which can distribute funds to members.

## **2. Your project**

One of the most important factors for the qualification of grant assistance is *the focus* of your proposed project or activity and how this addresses CRSWS aims. Your focus may be the purchase of equipment or materials, start-up costs for education or training classes, support for a project that is a direct follow-on from a small-scale pilot or series of taster sessions. It is, therefore, important to explain what it is you want the money for, being clear about the intended outcomes of your project, when and how often it will happen, where it will take place, when you will start spending the grant, whether there's any flexibility in your 'start date', whether this is an existing project and, if this is the case, how is your project currently funded.

We will not fund general running costs (e.g. day-to-day expenses such as gas, electricity and insurance costs), but are happy to help fund identified costs. Use the box provided to describe your project. We encourage you to try and express the aim of your project clearly and concisely, and make it clear what your project will do to achieve this aim.

### 3. Please provide a breakdown of the costs you are asking CRSWS to fund using the headings and description boxes

This section of the application form asks for more detail about your project costs and sources of other funding. This is a really important part of the form since it is designed to justify the amount you have requested and helps us to understand how you have arrived at the total costs of your project.

You may choose to draw up a budget for your project's work as a whole, a separate budget for a particular activity, or a single figure for a one-off item of equipment. Whatever you require funding for, when drawing up a budget you should include all aspects of your project – even hidden costs like staffing costs and the cost of those involved in the administration of your project, premises hire and related expenditure, communications (telephone/postage), and any travel or training. This section of the form has been designed to help you list your various cost items. Make sure you don't guess what the costs may be, but get estimates or quotes to illustrate how you have worked the costs out.

The first section of this part of the form asks you to add your project costs line by line. An example is provided at the top of this section to help you understand what we're after.

(Description) The next step is to break down how you have reached this cost and to enter the total cost in pounds. As you add budget lines your project will take shape. You should show a summary of the totals at the bottom.

The next section asks if you have any other funding, cash or non-cash, to support the cost of your project. If your project budget is entirely covered by CRSWS grant request then answer 'No' to this question.

Where additional funding is being provided to support your total project costs we would expect you to answer 'Yes' to this question and enter the requested details.

The section entitled 'Total project cost' asks for the amount you are requesting from us towards your project. Inclusion of VAT will depend entirely on your status as an organisation. If you are able to recover VAT then your application should ensure that the VAT element is not included in the amount requested from CRSWS. The final line in this section requests your total project cost to include the amount requested from CRSWS together with any funding you expect to receive from elsewhere (where this applies).

Always remember – don't over or under-estimate your project costs. Be as realistic as possible! And at the same time as telling us how much you need and what the funding will be used for, make sure that you tell us over what period of time the project is likely to run.

#### 4. The difference your project will make (outcomes)

##### 4a What difference will your project make? / Why is your project needed?

We want to know that any grant we provide will make a long-term difference to the lives of the people benefiting from your project. We need to be sure that the money we are giving will be spent wisely. As such we are interested in the positive outcomes derived from the assistance we can offer, and its significance to beneficiaries rather than to the applicant.

When approaching the subject of how your project will make a difference in your application, think laterally. Take a step back from what you intend your project to do and look at what impact it might have on beneficiaries. This way you are more likely to meet CRSWS objectives, and thus increase your chances of securing the funding you desire. Use the box provided to describe the health opportunities your project will provide and the impact it will have on CRSWS's objectives.

You should ensure that your answer to this question fully explains what you want your project to achieve.

CRSWS is focused on supporting projects that will provide clear benefits to cardiac patients and their families/carers and provide the best value for money.

##### 4b. How can we and you evaluate whether your project has had a positive effect on those it supports?

This is an important question since your reply will give us reference points to measure the success of your project against. You need to think about monitoring at the planning stages of your project and try not to leave it until you get your grant. Set specific targets that you want to measure or milestones that you want to reach, and make a decision about how you are going to measure whether you have achieved them. This will show us that you really do care about your project and the difference it will make.

#### 5. Independent referee

Your referee must be completely independent from your organisation. Ideally they will be someone involved in supporting cardiac patients or their families/carers in an official capacity and know your project / service plans, but will not benefit from the grant if it is awarded. Relatives of applicants are not acceptable referees. CRSWS may contact your referee as part of the assessment of your application and any award offered will be subject to a satisfactory reference.

## 6. Publicity

Publicising our work is important to us. An important way of sharing what it is we do is for successful applicants to publicise the benefits of our grant award. Please tell us how you propose recognising the support of CRSWS for your project.

## 7. For our information

It's important for the Trust to know how best to publicise its process for awarding grants. We want to do all we can to reach as many people as possible suffering or recovering from a heart condition, as well as doing all we can to educate the wider community in matters relating to cardiac conditions. We need to hear how you heard about our grants programme.

### Documents we need to see (organisations)

These may be essential documents that will be required before any award will be made to an organisation. Please ensure that you can provide the appropriate documentation before submitting your application. Please note that your application will not be processed for assessment until all documents are received, ideally attached to your completed application form.

1. A photocopy of the Governing Document. For example, this may be a constitution, memorandum and articles of association, trust deed or other formal document.
2. A photocopy of most recent audited accounts or accountant verified accounts.
3. Photocopy of last three bank statements.
4. Organisation's income and expenditure forecast for a minimum of three years (if audited accounts are not available).
5. Evidence of partnership funding, if applicable.
6. Project delivery plan.

### Documents we need to see (all applicants)

Please note that your application will not be processed for assessment until all documents are received, ideally attached to your completed application form.

**PLEASE NOTE**

The awarding of this grant is subject to the following conditions:

- It will only be used for the purpose you described in your application form and the Trust may require evidence (for example receipts) to confirm that this has taken place.
- You may be asked to share information with the Trust illustrating how you are achieving your aims and how your project is progressing. We expect to see project monitoring and a number of measurable 'outputs' to enable us to assess how successful our investment has been, and to judge whether your project is making a difference. Monitoring can include methods such as interviews, questionnaires or surveys to determine how people or their views have changed since the introduction of your project. To do this the Trustees may require you to attend an assessment meeting and/or complete an assessment form.

If these two conditions are not met, you may be required to repay the grant to the Trust.

**Return your completed grant application (and any additional documentation) to:**

The Trustees, Cardiac Rehab Support West Sussex, C/o Peter Hawkes, CRSWS, 4 Highdown Drive, Littlehampton, West Sussex BN17 6HJ. Mark your envelope 'PRIVATE'.

**Alternatively a completed copy of your application, together with any additional documentation, can be scanned and emailed to:**

Peter Hawkes, CRSWS at: [info@cardiacrehabsupport.org.uk](mailto:info@cardiacrehabsupport.org.uk)