



The Charles Plater Trust Application Guidelines 2009-2010

Theme for 2009-2010 Grant Awards:

“Imaginative projects providing education for people from the most marginalised sectors of society”

1. Grant Application Format

1.1. The Charles Plater Trust (the Trust) does not require applicants to use a special application form but requires the following guidelines to be met.

1.2. Applications should:

- a. Be no longer than eight A4 pages equivalent, excluding any cover page and the two required annexes (see below);
- b. Be typed in 11 point font size or larger;
- c. Contain numbered paragraphs and numbered pages.
- d. Include an executive summary in bullet point format;
- e. Be in Microsoft Word (.doc), Microsoft Excel (.xls) or Adobe Acrobat (.pdf) file formats. Please do not attach digital media files such as film, still images or audio.

1.3. A detailed budget set out as a spreadsheet should be appended as Annex 1.

1.4. Key personnel and their roles and responsibilities in delivering the project should be set out clearly and appended as Annex 2.

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2. Grant Application Content

2.1. The application document should:

- a. Contain the applicant organisation's name and all relevant contact information, as well as the organisation's purpose (aims and objectives)
- b. Provide the applicant's legal status *e.g.*, registered charity, academic institution *et cetera*.
- c. Where relevant, confirm that the organisation has a Child Protection Policy and that Criminal Records Bureau checks which comply with Safeguarding Legislation and Safer Recruitment Requirements are carried out on all staff working with children.
- d. Describe the project for which the grant is sought, answering the following questions:
 - What is the aim of the project?
 - What are its objectives?
 - How does it match the selection criteria? Explicit reference should be made to the nature and extent of the marginalisation being addressed by the project.
 - Why is it needed?
 - What practical results will it produce?
 - What are the planned positive impacts and outcomes?
 - How many people will benefit from these?
 - What stage has the project reached to date (outline/in progress)?
 - How will the organisation ensure that the project will be cost effective?
- e. Explain how the project will be monitored and evaluated, both during the project's operation and upon its conclusion.
- f. Demonstrate how results will be shared and applied.
- g. State what other funds have already been raised or committed for the project.
- h. Name any other sources of funding applied for to support the project.
- i. Supply the names and addresses of two independent referees.
- j. Be clear and avoid the use of technical terms, acronyms and jargon and, where abbreviations are used, write them out in full in the first instance.

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3. Eligibility & Application Details

- 3.1. The applicant organisation(s) must be based within England and/or Wales.
- 3.2. The maximum length of time for a project to be undertaken is twelve (12) months. Projects longer than this period will not be considered.
- 3.3. The Charles Plater Trust makes grants against a specific theme each year. The theme for the 2009-2010 granting year is:
Imaginative projects providing education for people from the most marginalised sectors of society.
- 3.4. Funding will be for up to 100% of project costs. Levels of funding should range between £30,000 and £100,000. For exceptional projects the Trust may, at its discretion, include larger awards.
- 3.5. The Trust will consider applications from organisations seeking to use its grant as match funding as part of a larger project, but only if it contributes to an effective delivery of the Trust's objects.
- 3.6. Applications from a consortium or partnership of organisations will be given consideration if relevant to the delivery of the project's aims and objectives and fulfilling all other eligibility criteria.
- 3.7. Applicants must be willing for their bid details to be made public if successful. They should expect that the Trustees, Grant Making Body or their nominated representative will publicise the progress of the project and its outcomes.
- 3.8. Applications must be sent as an e-mail attachment by **5:00pm on Wednesday 7th October 2009** to plater@cesew.org.uk.
- 3.9. What will happen to my application?
 - a. Applications will be acknowledged by email.
 - b. Applications that do not address the current theme will not be considered.
 - c. Applications will be considered by the Charles Plater Trust's Grant Making Body before being referred to the Trustees for final ratification.
 - d. Successful applicants will be informed in writing once the process is complete. This will not be until Spring 2010.
 - e. The Trustees of the Charles Plater Trust reserve the right to amend the terms and conditions of the grant making process at their discretion and without prior notice. Their decisions will be final.

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4. Financial Structures

4.1. How will the grant be paid?

- a. The letter confirming the award of the grant to successful organisations will be accompanied or followed by a contract and a request for the organisation to supply banking details. On satisfactory completion of the contract and supply of banking details, the Trustees reserve the right to pay the grant within the following parameters:
 - The organisation will receive 20% of the total grant given as start-up assistance.
 - Thereafter payments will be quarterly in arrears, when accompanied by narrative and financial reports. Reports will conform to a structure established by the Trust.
 - The final 15% of the grant awarded will be paid by the Trust upon receipt of an adequate final report. This must be received by the Trust no later than three months after the project's completion. Organisations should note this and take account of the process for cash flow and budgeting purposes.
 - Funding will be up to 100% of project costs.
 - Where the application for grant funding is made by a consortium or partnership, one of the applicant organisations must be identified as the responsible financial body (lead body) of the joint application. Responsibility for reporting and submitting narrative and financial returns will rest with the responsible financial body. Dispersal of funds received from the Trust to consortium members or partners for work undertaken on the project will be a requirement of the responsible financial body, not the Trust.
 - The Trust will consider applications from organisations seeking to use its grant as match funding as part of a larger project but only if it contributes to an effective delivery of the Trust's objects, reflects its values and relates directly to the current annual theme.
 - Levels of funding should range between £30,000 and £100,000. For exceptional and well-justified projects the Trust may, at its discretion, consider other levels of funding.