



# SHANLY FOUNDATION

## Application Guidelines

Please read these guidelines including the Application Terms and Conditions carefully before completing the application form, they are here to help you make a successful application. This document contains information on the following topics.

- Grant Categories
- Timelines & Process - a step by step guide
- Creating an online account
- What to include in your application
- Project Delivery Plan explained.
- How much to apply for?
- Hints and Tips
- Monitoring and Evaluation
- **Application Terms and Conditions**
- Reapplication

## Grant Categories

There are 3 funds you can consider applying for:

**The General Applications Fund** – the main fund,

- Open throughout the year to a wide range of applicants.
- Fund does not have a yearly budget.
- No deadline submission dates or limited application window.
- Board of Trustees meet monthly to consider and award grants.

The **Action Against Homelessness or Careers in Construction** funds both of which have a limited application window the dates for which are published each year in January.

- Open only to those working in the Homeless or Careers in Construction sectors.
- Aimed at giving grants of £10,000 or more and multiyear grants.
- As a new fund we are yet to set the parameters on the number of awards per year that will be made.
- 2024 Application Window Opens
- 2024 Application window Closes
- Award payments are made in November each year.

**Please note** - Applications received outside of a published funding window will be rejected without review.

- You may apply to only one fund per year.

In all three Grant Fund categories we accept applications but not specifically for:

- **Projects and Specific Activities** –these will have defined scope of work and project timescale. Please note - We are unlikely to cover the entire cost of your project.
- **Operating / Core costs** – this includes your organisations running costs -bill paying, rent and towards salaries. Please note It is unlikely that we would fund more than 2% of your total annual budget.
- **Unrestricted** - unrestricted grants cannot be used for endowments or reserves.
- **Capital Projects** For building works, repairs, or equipment that is needed for your work. Please note - when applying for this type of funding please:
  - Secure planning /relevant permission before you apply.
  - If you lease your building, you should have a lease of at least 20 years.

**Please note** - our Capital grants are normally made in the form of a pledge, with the money released when terms stipulated in your pledge offer letter have been met. Our terms will (but not exclusively), require you to have secured the remaining funds to complete the project, or a phase of the project.

**Multi Year Grants**- are not often awarded to applicants applying to the General Fund and may be awarded from the Action Against Homelessness and Careers in Construction Funds.

## Timelines & Process - All Grants

**General Funds** applications should be made a **minimum of 10 weeks before you require a decision**. If your application is for an event or is time sensitive, you are advised to leave at **least 10-12** weeks or more lead time to avoid disappointment. We do not mind receiving request well in advance.

Once you have created your online account with us and submitted your application form:

- 1.** Your application submission will be confirmed in an email along with a unique application reference number.
- 2.** Once your application has been reviewed you will receive a confirmation email from the Awards Officer confirming a board date or next steps. At this point if required we may ask for additional information or clarification.
- 3.** General Fund -The Trustees meet monthly to consider applications.  
Action Against Homelessness and Careers in Construction Applications - The board will meet to consider and inform you if you have been shortlisted within 8 weeks of your submission, next steps including timing will then be confirmed.
- 4.** You will be informed of the board's decision, in writing within 10 days of the board meeting date.
- 5.** Payment is normally made within two weeks of receiving your awards confirmation letter.  
Action Against Homelessness and Careers in Construction -awards payment will be received by the end of November in the year of application.

## Creating you online account with us

If you have not applied to us before and do not have an online account with us already, please register here to set up a new account.

[https://shanlyfoundation.grantapps.net/application\\_form/init.pl](https://shanlyfoundation.grantapps.net/application_form/init.pl)

If you are having trouble:

- If having tried to create a new account, you receive the message 'invalid email or password,' this means that an account with this email address already exists.

- If you need to reset your password, please click the 'Forgot Password,' button and follow the steps.

Are you a returning applicant or grant holder?

- If you already have an account but want to start a new application, please log in using your email address and password.

If you still have trouble, please call us on 01494 683866 or email us at [info@shanlyfoundation.com](mailto:info@shanlyfoundation.com) with a contact telephone number.

## What to include in your application

Our applications form will take you step by step through the information we require from you.

1. Application form questions can be printed off in advance, to allow you to work on your answers in a word document before moving on to complete the form.  
[https://shanlyfoundation.grantapps.net/application\\_form/ola1allq.pl](https://shanlyfoundation.grantapps.net/application_form/ola1allq.pl)
2. Additional question guidance information can be found by clicking on the ? next to the application form question.
3. When filling out your answers please ensure that they include the following information.
  - What is the need you are addressing, why is it important?
  - How does this application meet this need?
  - What are the expected outcomes of this work?
4. Your finances - you are required to submit to us your most recent accounts. If you are a registered charity these should be your audited accounts or a copy of your Charities Commission annual return. If you are a **state-run school, we do not require you to submit your audited accounts.**

If submission timing means that you can only submit draft audited accounts, we will accept these but may make further enquires to fully understand your organisations current financial position.

Please feel free to submit a written explanation of your accounts if you think this will help our Trustees. This is particularly important if your accounts differ significantly from the previous year, if your organisation is going through tough times, please

provide a clear and honest explanation of what is happening and how you intend to combat this now and in future years.

5. **Question D3** on our application form asks - *Please provide a full break down of the cost stated in B14 and upload your document here* –This document should detail the proposed expenditure and exactly how you will carry out the work and the time scale of its delivery.

**Capital Build Applications** - in addition to the information detailed above Capital build projects should include:

- Confirmation that planning /relevant permissions have been secured.
- If you lease your building, confirmation that you have a lease of at least 20 years.
- Tell us what financial impact the capital project will have on your charity, going forward, e.g., will your costs increase?
- Tell us about who will manage your project and their experience.
- List several quotes that you obtained before making your choice of which contractor to go with.
- Tell us how much you have raised /pledged to date for this project.
- Tell us about the contingency you have factored in should your project go over budget.

6. **Question D4** on our application form asks you to - *Please submit one month's bank account statement*. This statement must not be older than 6 months. Please ensure that the attached statement clearly shows the

- Bank Name (Please note this is **not** the information we require when you fill in question E3).
- Account Name – it is particularly important that you submit the name of your account as detailed on your bank statement, as this forms part of the key information we need to make a payment to your account. The account name should be your answer to question E3 on the application form.
- Account Number - this information should mirror your answer to question E4.
- Sort Code- this information should mirror your answer to question E5.

7. **Project Delivery Plan** – is required to be submitted with your application if you are requesting a donation of:

- Ten thousand pounds or above
- A multiyear grant (even if your request is for under £10,000)
- Funds for a capital project

## Project Delivery Plan Guidance

As well as the information you will have provided in answering question D3 (your answer to D3 should tell us all about the proposed expenditure and exactly how you will carry out the work, project, activities, and the time scale of the delivery), we need to see your projected income and expenditure for each year your application refers to. This should show your organisations projected income and expenditure in either your financial or calendar year whichever you use for planning purposes. You might find it helpful to submit this information in the form of two tables, an example of which are detailed here for your reference.

**Example Table A** - to show your income for the period your application relates to, this table should show a breakdown of how much funding has been secured already and what your shortfall is.

<b>Date work /activities commence:</b>			<b>Date work/activities end:</b>
<b>Source of Income</b>	<b>Anticipated /target income</b>	<b>Confirmed income to date</b>	<b>Notes</b>
Contracts /Statutory funding	£150,000	£100,000	Council yet to confirm renewed funding
Other earned income	£50,000	£10,000	Sales
Trust and Foundations	£100,000	£30,000	List donations /pledges to date confirmed & list outstanding applications
Corporate donations	£20,000	£10,000	Name of companies
Individual giving	£10,000	£5,000	List activities/ where funds will come from
Community events	£2000	£1000	List activities/ where funds will come from
Contribution from reserves	£80,000	£80,000	If planned
Subtotal anticipated /target income	£412,000		
<b>Subtotal of confirmed income</b>		<b>£236,000</b>	
<b>Shortfall</b>	<b>£</b>		

### Example Table B - Expenditure

Please provide a breakdown of how much your organisation plans to spend for the years relating to your application. Your table may look something like this:

Date work /activities commence:	Date work/activities end:	
Expenditure Item	Amount	Notes
Salaries	£250,000	3 full time ,2 part time
Training	£10,000	
Programme Costs	£60,000	
Repairs and maintenance	£5000	
Rent /utilities	£30,000	
Legal /professional fees	£5000	
Governance costs	£5000	
<b>Total</b>	<b>£365,000</b>	

### How much to ask for

As an organisation the Shanly Foundation tends to contribute, rather than entirely fund your work. How much you apply for is entirely up to you, but we would draw your attention back to our website grants page and last year's awards data as depicted in the slider graphs. Most general grants awarded are under £10,000 and the majority of these under £5000.

Action Against Homelessness and Careers in Construction funds are open to larger and multiyear requests up to a maximum of £150,000.

### Application Hints and Tips- All Awards

- When filling in the online form remember periodically to click Next or Exit (Autosave) if leaving your application form for any lengthy period to avoid being timed out.

- The use of bullet points throughout the application form are an acceptable and straightforward way to show key points.
- When filling in numbers please do not include commas or decimal points
- Please ensure your organisation's name is in the title of all attached documents.
- When attaching a document, once you have selected it ensure to click on the ATTACH button.
- If you need to you can submit a word document explaining why you are unable to submit a document. This will enable you to move on to the next question.
- When the form asks you to fill in the name of your bank account – this does not mean the name of your bank but **does mean what your account is called** e.g., Careers in Construction Current Account.
- Bank statements – we need to see the front page of one month's bank statement which should show your account details and your registered address, we use these to verify and prevent fraud, your transactions can be redacted.
- File attachments – the maximum file you can attach is listed below, if you have a large document, please reduce it before attaching.

Maximum file size – Questions D1 Annual report 15mb, D2 Accounts 10mb, D3 Cost break down 10mb, D4 Bank statement 5mb, D5 Project plan 10mb, H1 Monitoring report 10mb, H2,3,4 Photographs 10 mb each.

**To upload an attachment,**

- Click the Choose File or Browse button, search for the file, and click Open.
- The name of the selected file will be displayed next to the Choose File or Browse button.
- Click the Attach button.
- The file has been successfully attached when the file name is displayed in green with the message the file 'Was Uploaded Successfully' and the button display will revert to 'No File Chosen'.

**To replace an attached file, repeat the above steps.**

Please convert all files into PDF. Do not send secured files.

Replace spaces in file name with underscores or hyphens.

('my file.pdf' becomes 'my\_file.pdf' or 'my-file.pdf')

## Monitoring and Evaluation

After receiving a grant award from the Shanly Foundation you will be required to keep us informed of your progress against the parameters set out in original application form. We will invite you by email, shortly after the date you have stipulated your project/work will end, or after one year, whichever is sooner, to complete our monitoring and evaluation form by



logging back into your online application account and completing a short questionnaire. You can also upload supporting documents and photographs.

A gentle word of advice - Please note that we take into consideration when reviewing and deciding on awards, your feedback, failure to submit a timely report could jeopardise future applications.

Please note our automated message inviting you back to complete stage 2, the monitoring and evaluation part of your application form will be sent to the email address provided by the person completing the application form. It is therefore especially important that contact details should be kept up to date. Please email [info@shanlyfoundation](mailto:info@shanlyfoundation) to inform us of any changes.

## Awards Terms and Conditions

1. The award is to be used specifically for the purposes given in the approved application. If you are unable to use the grant for the specific purpose for which it was intended, please contact the Foundation prior to spending any portion of the award.
2. We understand that projects sometimes change as they develop. If any significant changes are likely to be made to the project's scope or scale, before or during implementation, or if the project's timetable is delayed, please inform the Foundation as it may affect the original basis of the award.
3. For awards and/or pledges for projects that may take over one year, the Foundation would ordinarily require progress or update at the end of each year. We would also expect that accounts of how awards/pledges are expensed to be lodged.
4. On completion of a project, any unspent portion of the grant should ordinarily be returned to us. If, once you have received the money, you envisage the timescales of your project changing, you must contact us to explain the situation and request approval for any extension to the terms of the grant.
5. The Foundation may require repayment of a grant if you become insolvent or go into administration, receivership, or liquidation.
6. Your organisation is not eligible to make a further application to the Foundation until at least twelve months have passed from the date of your grant offer letter. In some cases, the Foundation may extend this time, in which case the terms will be contained in your grant award letter.
7. If your organisation does not meet the requirements set out in this document, the Foundation reserves the right to reclaim some, or all, of the grant at any time.

## Pledges

In some instances, the Foundation may offer a grant to be paid when specific conditions have been met (for example when your organisation has raised a certain level of funds). In this instance you will receive a Pledge Letter which will outline what the conditions are. Pledge monies are reserved and available to draw down at any time within a two-year period from the date on your pledge offer letter. Should you be unable to meet the terms stipulated in this letter within this time you should contact us to discuss what happens next. The Shanly Foundation reserve the right to withdraw pledge awards if not claimed within a two-year time.

At the point you believe your pledge conditions have been met, grants should be claimed in writing to [info@shanlyfoundation.com](mailto:info@shanlyfoundation.com) with relevant supporting evidence. Payment will only be made if the Foundation is satisfied that your organisation has met these terms.

## Acknowledgement

The Foundation requests that the grant is acknowledged in an appropriate and timely way, though we appreciate that how this is done will depend on the nature of the organisation and the project.

## Monitoring and Evaluation

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Please note our automated message inviting you to log in to complete the monitoring and evaluation part of our application form, will be sent to the email address provided by the person competing the application form.

## Re-application

You can reapply to Shanly Foundation 12 months from the date on your last award offer or rejection letter.

If you are coming to the end of a multiyear award you may reapply in the last year of your grant.