

Guidance notes for applicants

The aim of the Community Foundation for Surrey is to award grants to community and voluntary groups for charitable purposes that make a genuine difference to the lives of people in Surrey.

Our priorities

Our priorities are expressed in four broad areas – which inevitably overlap.

- **Health & Wellbeing** - Advance people's physical and mental health, wellbeing and safety
- **Education & Skills** - Improve life skills, education, employability and enterprise
- **Disadvantage & Exclusion** - Promote reduction of isolation and disadvantage and access to local services
- **Stronger Communities** - Maximise ability to strengthen community cohesion and build social capacity

In addition, our funds will support Arts Culture and Heritage and Environment projects where they address social welfare and community need.

Supporting Health and Wellbeing

- Mental ill-health - Support people to cope with and manage mental health issues and enable early intervention.
- Addiction - Support people with drug, alcohol and substance abuse related issues.
- Active lifestyles - Promoting the benefits of healthy living and eating. Helping to counter obesity, preventable diseases and mental ill-health.
- Disability - Support social inclusion for people with long-term illness or disability.
- Supporting recovery - Supporting therapy, advice, counselling and practical help to aid recovery and improve lives
- Caring responsibilities – supporting people caring for others
- Reducing loneliness - Provide older people with opportunities to access and participate in their local community to prevent isolation

Advancing Education, Skills and Employment

- Young People - Helping young people to obtain entry level qualifications and develop life skills which will improve their chances of gaining employment. Widening horizons – giving children and young people in disadvantaged communities access to experiences.
- Adults - developing the basic skills which lead to employment, including IT skills, soft skills and confidence building to overcome barriers.
- Disability - providing support to participate in work

Addressing Disadvantage and Exclusion

- Emergency help to those living in deprivation through access to emergency food, home supplies, practical advice and support.
- Exclusion – support projects providing opportunities for the most disadvantaged to develop their skills, confidence and abilities to live independently and to participate in their community.



- Reduce isolation and improve access to services by supporting projects which remove perceived and physical barriers to participation.
- Homelessness and Housing – projects supporting people who are homeless or insecurely housed and the causes of homelessness.
- Narrow the gap which exists between the economic prospects and the health and wellbeing of affluent and poor families and vulnerable groups.

Supporting Stronger Communities

- Resilient communities supporting projects which work to prevent crime or reduce re-offending, and which support the victims of crime.
- Domestic abuse Provide temporary accommodation, advice and practical help.
- Equity - promote and improve social cohesion and BAME inclusion.
- Targeted giving – encouraging applications and awarding in communities of need
- Community Assets - supporting infrastructure and community development work to build strong communities

Eligibility

Who we support;

- Registered charities working for the benefit of people in Surrey.
- Voluntary and community groups which are charitable in purpose and are working for the benefit of people in Surrey.
- Not for profit organisations such as CIC with a clear social purpose working for the benefit of people in Surrey - such organisations can generate surpluses but where they do, they are reinvested to support the charitable work of the organisation.
- National charities may apply where the local branch is independent and locally constituted, the project is clearly locally driven and accounted for, and funding will be used to support work which is for the benefit of the people of Surrey.
- Faith groups, where the project clearly benefits the wider community.

Guidance can be found on the Charity Commission website regarding charitable purposes

<https://www.gov.uk/government/publications/charitable-purposes/charitable-purposes>

To be eligible you should have;

- A management committee (the people who are responsible and make decisions) of a minimum of three unrelated people
- A signed constitution (or set of rules)
- A bank account in the name of your group which requires two signatories / dual authorisation.
- A Financial Policy (a document which lays out how you manage money and payments)
Guidance can be found on the Charity Commission website
www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8/internal-financial-controls-for-charities
- If you work with children, young people or vulnerable adults you must have a Safeguarding Policy. Guidance can be found on the Charity Commission website.
www.gov.uk/guidance/safeguarding-duties-for-charity-trustees

Small and new groups which are not constituted may apply under the umbrella of another group which will act as a fund holder for the grant.



Funding to Social Enterprise and CICs

The Foundation recognises that a Social Enterprise (SE) and Community Interest Companies (CIC) are increasingly part of the wider Third Sector and as such they are often in a good position to tackle social issues by generating income as part of their normal operation. Therefore, when a SE or CIC makes a grant application it is important for the applicant to demonstrate a sound business model or strong financial track record.

If you are a Social Enterprise (including CIC), in addition to meeting our general criteria you will need to demonstrate:

- the public benefit and clear protection against private benefit (CICs should provide CIC 36/37 Public Benefit Statement)
- that you are independent
- that you have social and/or environmental objectives and evidence that these are being achieved
- you earn 50% or more of income from trading
- evidence that more than 50% of profit is being put back into the social and/or environmental purposes
- that all residual assets would go to social and/or environmental purposes on dissolution
- a track record or sound business model through the provision of a business plan
- that you have a minimum of three directors, the majority of whom are not paid employees
- that the salaries and benefits of any paid directors are approved by a majority of non-executive directors and are reasonable and proportionate to the work they do and the financial position of the organisation

The Foundation would prefer that a SE or CIC will have been registered with the appropriate Regulatory Body for twelve months prior to the date of the grant application. The Foundation would normally expect a SE or CIC to have become self-sustaining within four years from incorporation but will consider applications from those which have been established for a longer period than this, providing the application is for capacity building or a new initiative that will develop services for the ultimate benefit of the user group.

What kind of projects can we fund?

We can make grants to most types of community activity or projects for charitable purposes depending on the range of funds available including.

- Core costs / essential running costs
- Revenue costs
- Capital costs
- New projects
- Existing projects
- One-off initiatives

Where there are possible external requirements such as planning permission, please ensure that you have checked whether planning permission is needed prior to submitting the application and if planning permission is needed, that you have commenced the process of obtaining permission.

We cannot support;

- For profit businesses
- National programmes without a specific benefit to Surrey



- Faith groups where the project is exclusively for the benefit of members or for proselytising
- Councils, Parish Councils or schools (PTAs set up as a charity can apply)
- Projects that are based outside of Surrey
- Projects which have already taken place or items purchased prior to or during a grant application
- Unspecified expenditure for general appeals or fund-raising events/activities
- Core costs for CICs
- CIC limited by Shares
- Requests to build reserves
- Funding for Statutory obligations
- Political activities

Please note organisations which hold a high level of free reserves are unlikely to be funded.

Conditions of Grant Award

Any grant award is made with the following conditions

- Any and all monies awarded must be used for exclusively charitable purposes.
- The award is intended only to fund the items specified in your request and should be recorded as Restricted income in your accounts.
- If the project/activity changes in any way from the original application, the Community Foundation for Surrey will be notified immediately. Significant variations may result in the grant being altered or withdrawn.
- Our grants are usually intended to be used within twelve months. If you have been unable to start using the grant within three months of receipt, or it cannot be used for the purpose for which it was awarded you must contact the Foundation as soon as possible.
- An End of Grant Form will be completed and returned to the Community Foundation for Surrey. Further applications cannot be invited where grant monitoring is overdue.
- A copy of your organisation's annual accounts for the period will be provided to the Community Foundation and these will clearly show the grant award from the Community Foundation for Surrey.
- Public information about any grant awarded may be shared in open datasets. No personally identifying information will be published.