



THE CLIVE & SYLVIA RICHARDS CHARITY (CSRC)

Charity No 327155

GUIDANCE FOR APPLICANTS

WHO MAY APPLY?

- The Charity was established in May 1986 and has evolved since then. It currently donates between £500,000 and £1.5million per annum. The broad division of donations can be seen to be allocated to Education (35%), Medical including hospitals and hospices (35%), Heritage (15%) and Arts (15%). These percentages are not carved in stone and the Trustees can vary the percentage from year to year.
- There is a geographic limit to who can apply namely within 100 miles of the centre of Hereford.
- The Charity likes to focus on smaller Charities or projects where if the CSRC was not involved it probably would not happen. The 'strap line' of "making a difference" is a strong indication of what the Trustees favour. There is an upper limit of £100,000 in any one year to any one charity.
- We do not usually make grants towards operating costs (i.e. Revenue costs) or expenditure that is or was the responsibility of statutory organisations such as Local Authorities.
- We do not support National Charities.
- Overseas - We will only support overseas applications from English speaking countries restricted to Africa and India and they must have a UK based representative/contact.

WHEN MAY APPLICATIONS BE SUBMITTED?

- Individual Educational applications may be submitted between 1 April and 31 May each year. All applications will be discussed by the Trustees during June/July. Generally, the maximum amount awarded as a grant to an individual is £2,500. The Trustees expect termly reports from all students awarded a grant.
- General UK applications may be submitted at any time.
- Overseas based organisations/groups may be submitted at any time but will not be considered without a UK contact/representative.

Further and future applications may be submitted but there must be at least 12 months' gap from the result of the previous application and it must be for a different project.

WHAT INFORMATION MUST BE PROVIDED?

We have a two stage application process:

Stage 1

1. Please complete the relevant application form found on the CSRC website. There are currently 3 types of application namely: -

A. An organisation/group application (e.g. groups, bodies, schools, educational establishments, charities etc). We do not cover operational costs (i.e. running costs) including salaries, rents etc.

B. An individual application (e.g. a single person requesting a music bursary, assistance with educational fees/tuition or medical equipment). The applicant must be UK based and either living within the UK geographical area or the educational establishment must be within that area in the UK.

We are unable to support individual overseas students for educational support in the UK or overseas.

C. An overseas based organisation/group application (e.g. where the groups, bodies, schools, educational establishments, charities etc are primarily based overseas). Please note, an overseas application will not be considered without a UK contact/representative/sponsor who the Trustees may wish to meet if your application progresses to Stage 2.

The form will require you to submit a brief summary of your organisation, a description of the project, to be funded, including the total cost, the amount requested and proposed timescale. Please **DO NOT** send any other paperwork such as accounts or brochures at this stage.

Based upon the information provided, a decision will be made whether or not to invite a full application e.g. Stage II. This decision will be made at a monthly meeting attended by 2 Trustees. Full Trustee meetings are held every 2 months and only Stage 2 applications will be considered by the full Board of Trustees.

How to prepare the application form

Click on the relevant download button. Save the PDF download to your own computer naming it your own name (if an individual application) or the name of your charity (if UK or Overseas application). Once saved in the correct name **close this document**.

Then re-open your newly saved document and begin to enter the information. It is recommended that you save as you go along. You will be restricted as to how much information you can enter in the boxes. This is relevant because the application forms are printed and handed to the Trustees. If you type beyond the box, no-one will see what you are adding. Whilst you may feel that there is not much room to give sufficient information to the Trustees, they only need a basic idea of the project. If they need to see more you will be put through to Stage 2 and further information will be requested.

Covering emails are not printed and neither are additional sheets of paper – only the 2 page application form.

Stage 2 - by Trustee request only

A. For Stage 2, **organisation/group application** and **overseas based organisation/group application** will be invited by the Trustees to provide information in a format which is most convenient for them but applications must include the following details:

- Contact name, address, telephone number and e-mail
- A brief description of the organisation, its objects and its history and development.
- The number of members/users, their age range and any membership fees paid. If there is a constitution, please include a copy.
- A full account of the purpose of the project for which a grant is requested and a clear indication of the amount of financial support being requested. It is important to demonstrate that you need a grant and that it will provide important benefits.
- Accurate costings, showing where appropriate that the applicant has obtained reasonable estimates from a range of sources. **No additional sums will be granted if estimates prove to be inadequate.**
- Whether VAT is included in the estimated costs. (VAT will not be applicable to **overseas** based organisation/groups and some organisations may be exempt from VAT or able to recover VAT payments). It is the applicant's responsibility to check with Customs and Excise or, in the case of schools, the Education Authority, if in any doubt. **Organisations cannot claim additional amounts to cover VAT after the application has been approved.**
- Other sources of funding must be clearly shown. For example, funds being contributed by the applicant or bids for funding from charities, lotteries, local authority, parents' groups etc. If an award from CSRC does not enable you to fund the whole project, what is your business or strategic plan for raising further amounts?
- A copy of the latest audited accounts or, for very small organisations, a copy of the latest bank statement.

Accounts should be:

1	As up-to-date and accurate as possible (usually no more than 9 months old)
2	Suitably detailed as well as showing a clear summary of income, expenditure and balances.
3	Accompanied by notes explaining any likely queries (e.g. significant surpluses, reserves, loans, creditors, other present and future commitments, deficits)
4	A post-audit statement if accounts are several months old, indicating any financial changes or developments since the audit.
5	A business plan going forward for 3 years with a detailed budget for the current year and management accounts for the year to date.

- **The importance of submitting meaningful and clear accounts cannot be overstressed. The Charity will not consider making an award unless this request is satisfied.**
- For schools, the Trustees want to see the annual budget out-turn statement, showing any carry forward surplus or deficit. They also want to see details of the current year's total income, budget, expenditure and forecast of likely carry forward or or deficit balances.
- For Organisations - A copy of your main **policies**, to give the Trustees confidence in your legal & regulatory compliance and adoption of best practice. These may be emailed as PDFs for Stage 2.
- It will also be helpful if you are able to provide your Bank details i.e. bank name and address, sort code, account number and account name.
- The covering letter should confirm the full commitment of the organisation to the project and should be signed by the chief executive (or equivalent).

B. Stage 2 **individual applications** which must include the following details:

- Information regarding your current living situation, showing all incoming funds and outgoing costs including rent, bills, travel costs, expenditure, savings.
- Details of other charities and grant making bodies to whom you have already applied showing any Grants/support received or promised.
- Evidence of the costs to be involved in your studies, course, training, project information etc such as quotations or confirmation letters from educational establishments.

HOW ARE APPLICATIONS PROCESSED?

- We acknowledge receipt of all applications received and they will be allocated a unique reference number. **Please do not telephone** to find out the progress of your application.
- Occasionally we may ask you to present your application to the Trustees in person and they can ask you questions. Trustees receive a clear written summary of the applications and copies of accounts about a week before each meeting. All decisions are taken by the Trustees, who make one of the following responses:
 - a) award a full grant
 - b) award a proportion of the sum requested
 - c) defer any award pending further information
 - d) decline the application

The decision of the Trustees is communicated to the applicant in writing as soon as possible after the meeting together with arrangements for claiming the grant (see below).

The Trustees' decision is final and they do not give reasons for refusing or reducing a grant request. Please do not telephone for an update after the Trustee meeting.

Please do not re-apply for funding within 12 months of hearing the result of your previous application

OTHER MATTERS

- Details of each application are confidential. The Charity will make no public comment about applications received or being processed. Organisations are asked to observe similar decorum.
- The income available for grant-making is derived from investments, rents and gifts from Clive & Sylvia Richards and therefore varies from year to year. Grants are made from surplus funds. We receive more applications than we are able to fund.
- Details of the Charity's aims and activities are published in the Annual Report, and on the website along with a full list of grants awarded. Details are also sent to the local press and to the Charity Commission.

If an application is approved, the organisation will be sent full details about arrangements for claiming the grant. Please note that CSRC very rarely makes a cash payment.

It is normal procedure for CSRC to pay contractors' invoices after receiving confirmation that goods or services have been satisfactorily received. In exceptional circumstances, an organisation can apply for reimbursement if it can demonstrate that it has paid an account from its own funds and can supply copies of the original invoices and evidence of payment. It is essential that organisations have all invoices made out in their name, not in the name of CSRC.

Stage 1 Application forms should be emailed to Caren via admin@csrcharity.com or posted to:-

Mr Rob Woolf
The Clive & Sylvia Richards Charity
The Lower Hope Estate
Ullingswick
HEREFORD
Herefordshire HR1 3JF

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