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| Confirm your details form(Version 4 – March 2017) |

**Publication:** Confirm your details form

**Version:** 4 – March 2017

**Further copies available from:**

* **Email** general.enquiries@biglotteryfund.org.uk
* **Phone** 0845 4 10 20 30
* **Text Relay** 18001 plus 0845 4 10 20 30 (this is for those with a hearing or speech impairment)
* **Our website** [www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk)

**Accessibility**

Please contact us to discuss any particular communication needs you have.

**Our equality principles**

Promoting accessibility; valuing cultural diversity; promoting participation; promoting equality of opportunity; promoting inclusive communities; reducing disadvantage and exclusion. Please visit our website for more information.

**We care about the environment**

The Big Lottery Fund seeks to minimise its negative environmental impact and only uses proper sustainable resources.

**Our mission**

Helping communities and people most in need.

**Our values**

We have identified three values that underpin our work: being supportive and helpful, making best use of Lottery money and using knowledge and evidence. You can find out more about us, our values and the funding programmes we run by visiting our website [www.biglotteryfund.org.uk](http://www.biglotteryfund.org.uk)

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grant maker and employer. The Big Lottery Fund will aim to adopt an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

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\*These page numbers may change once you start completing the form.

Summary of changes

We’ve added a new question (**question 5)** to ask what has changed about the project since stage one.

Introduction

**How to make sure this application form works correctly**

* Save a copy of the form to your own computer.
* Type directly into this form. Don’t copy and paste from another document as it may cause formatting problems which you might not notice. For example, it could cause you to go over the character limit for a question without realising it.

**Before you start completing the form**

* Make sure you’ve read our **Guide to stage two** as this sets out what you need to send with this form.

**Completing the form**

* Make sure you’ve answered every question and read through your form before you send it to us. Email your completed form and the documents we have requested in our **Guide to stage two** to esf@biglotteryfund.org.uk putting the name of your organisation from **question 5** into the email subject line.

**Deadline for applications**

* Your application must reach us by the date we have given on the letter inviting you to stage two.

**Help with your application form**

* If you have any questions about Building Better Opportunities or completing this application form, email us at esf@biglotteryfund.org.uk.

Part one: Your project

1. **What would you like to call your project?**

Give your project a short title, something we can use in publicity if you are successful.

Write up to 70 characters, including spaces.

|  |
| --- |
|       |

1. **Which project outline are you responding to?**

Tell us the reference number for the project outline this application form is addressing.

|  |
| --- |
|       |

1. **When are you planning to start and finish your project?**

Your start date must be within four months of the grant offer, if you are successful.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Start date** | Day |       | Month |       | Year |       |
|  |
| **Finish date** | Day |       | Month |       | Year |       |

1. **Where will your project take place?**

This helps us understand where our money is making a difference. Give the location of the places where your project will happen.

Please note that some projects cover more than one ESF ‘Category of Region’ (COR) and must be delivered from at least one location in each COR, with the appropriate percentages. If this applies to your project, the letter inviting you to stage two will say so.

* If your project will take place at (or be run from) a single location, for example a community centre, enter its postcode, put 100 per cent and select it as the main location.
* If your project will take place at (or be run from) a number of locations, for example different community venues, estimate a percentage for each one, then select one main location for your project. The total percentage for all rows must add up to 100%.
* If you have not identified exactly where the project will be delivered yet, please enter the project’s correspondence address.
* If the location doesn’t have a postcode, use one for a nearby building.

You can enter up to 10 locations in the table. If there are more than this select the top 10.

|  |  |  |  |
| --- | --- | --- | --- |
| **Building name (or number) and street** | **Postcode** | **% per location** | **Main location** |
|       |       |       | [ ]  |
|       |       |       | [x]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |
|       |       |       | [ ]  |

1. **How has your project changed since stage one?**

Summarise what you’ve done to develop your project, including who completed it, who else was involved and how the work has been incorporated into your stage two application. Include details of any materials changes that we need to be aware of.

Write up to 2,100 characters, including spaces (about 300 words). The box should increase as you type.

|  |
| --- |
|       |

1. **How much will your project cost?**

Summarise your project costs using the following headings. We would expect to see a much more detailed budget as part of your project plan.

|  |  |
| --- | --- |
| **Cost heading** | **Total cost (£)** |
| **Direct costs** |
| Staff costs (including employer’s NI and pension contributions, and any taxable incentives linked to pay) |       |
| Staff expenses such as travel or allowances |       |
| Participant costs such as expenses and childcare  |       |
| Consumables such as stationery and essential software |       |
| Venue hire and the lease or rental of buildings |       |
| Hire or operating lease of equipment |       |
| Small items of equipment costing up to £1,000 |       |
| VAT that cannot be reclaimed from HMRC |       |
| Participant allowances and incentives |       |
| Marketing and promotion |       |
| Monitoring and evaluation |       |
| Storage of evidence and data |       |
| Other direct costs (please specify): |       |       |
|       |       |
|       |       |
| **Total direct costs** |       |
| **Indirect costs** |
| General administrative or support staff where their duties cannot be separated from core work |       |
| Insurance such as employer’s liability and building insurance |       |
| Utilities and other overheads such as telephone, postage, electricity and water |       |
| Other indirect costs (please specify): |       |       |
|       |       |
|       |       |
| **Total indirect costs** |       |
| **Total direct and indirect costs** |       |

Part two: Your organisation details

1. **What is the full legal name of your organisation, as shown on your governing document?**

|  |
| --- |
|       |

1. **Does your organisation use a different name in your day to day work?**

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Yes | [ ]  | No |

If yes, what other name do you use?

|  |
| --- |
|       |

1. **What is the main or registered address for your organisation?**

If we offer you a grant, this is the address we’ll send our offer letter to, so make sure you can safely receive post at this address. We recommend this to be your organisation’s office address, but if you don’t have an office your registered address may be a home address.

|  |  |
| --- | --- |
| Organisation name |       |
| Sub-building name/number |       |
| Building name |       |
| Building number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

|  |  |
| --- | --- |
| Phone number one |       |
| Phone number two or text phone |       |

1. **What is the main email address for your organisation?**

This should be the email address people use to contact your organisation. It can be a personal email address if your organisation doesn’t have an email address.

|  |
| --- |
|       |

1. **Does your organisation have a website?**

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Yes | [ ]  | No |

If yes, whatis its address?

|  |
| --- |
|       |

**12. What type of organisation are you?**

Select all options that are relevant to you.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Charity | Registered charity | [ ]  | Charitable unincorporated association  | [ ]  |
| Charitable incorporated organisation | [ ]  | Charitable trust | [ ]  |
| Exempt charity | [ ]  | Excepted charity | [ ]  |
| Charity (Royal Charter or Act of Parliament) | [ ]  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Company or mutual society | Company limited by shares | [ ]  | Company limited by guarantee | [ ]  |
| Company listed publically | [ ]  | Community interest company limited by shares | [ ]  |
| Community interest company limited by guarantee | [ ]  | Community interest company listed publically | [ ]  |
| Credit Union | [ ]  | Limited liability partnership | [ ]  |
| Industrial and provident society | [ ]  | Co-operative | [ ]  |
| Friendly society | [ ]  |
| Public sector | Community council | [ ]  | Parish council | [ ]  |
| Town council | [ ]  | Local authority | [ ]  |
| NHS Trust foundation | [ ]  | NHS Trust – other | [ ]  |
| Health authority | [ ]  | Local health board | [ ]  |
| Non departmental public body | [ ]  | Police authority | [ ]  |
| Fire service | [ ]  | Prison service | [ ]  |
| Other | [ ]  |
| School | State school | [ ]  | Community school | [ ]  |
| Foundation or Trust school | [ ]  | Voluntary aided school | [ ]  |
| Voluntary controlled school | [ ]  | Academy | [ ]  |
| City technology college | [ ]  |
| Other | Individual  | [ ]  | Sole trader | [ ]  |
| Further or higher education | [ ]  | University | [ ]  |
| Independent school | [ ]  | Non charitable unincorporated organisation | [ ]  |
| Faith based organisation | [ ]  | Parochial church council | [ ]  |
| Partnership | [ ]  | Other | [ ]  |

**Give any reference or registration numbers you have:**

|  |  |
| --- | --- |
| Charity Commission for England and Wales |       |
| Charity Commission for Northern Ireland (or HMRC number) |       |
| Office of the Scottish Charity Regulator |       |
| Companies House  |       |
| Financial Conduct Authority |       |
| Health Authority number |       |
| School reference number |       |

|  |  |
| --- | --- |
| Other reference or registration numbers |       |
| Please give details: |       |

**13. When was your organisation set up?**

Give the date when your organisation adopted its current legal status. This should be on your governing document. All organisations need to provide this. If you’re a school or statutory organisation, check with your administrative body - if you don’t know the exact day or month, please give us an approximate date.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Day |    | Month |    | Year |      |

**14. What is your VAT status?**

For more information on VAT see the HM Revenue and Customs website <http://www.hmrc.gov.uk/vat/>

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | VAT registered | [ ]  | Not VAT registered |

If you are VAT registered, what is your VAT registration number? Your VAT number should be between 9 and 12 numbers long and have no spaces.

|  |  |
| --- | --- |
| **VAT number:** | GB      |

**15. Is your organisation independent, or a branch or department of a larger organisation?**

|  |  |
| --- | --- |
| [ ]  | Independent |

An independent organisation will have its own governing document and can manage its own funds and staff.

|  |  |
| --- | --- |
| [ ]  | Branch or department |

To be able to apply to us a branch must have its own governing document (or will have adopted its parent organisation’s governing document), produce its own annual accounts (which may be included in its parent organisation’s accounts) and have a bank or building society account in the legal name of the branch as shown in its governing document and be responsible for how the funds in it are spent.

If you are a branch, what is the name and address of the larger organisation?

|  |  |
| --- | --- |
| Organisation name |       |
| Sub-building name/number |       |
| Building name |       |
| Building number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

If we offer a branch a grant we will ask the larger organisation to accept overall responsibility for it. For branches where there is insufficient local control, the parent organisation will need to apply.

1. **How many people are on the board or committee that runs your organisation?**

|  |
| --- |
|     |

1. **Are there any restrictions on who can join your organisation?**

For example:

* if your organisation has a membership we expect this to be open to all and that anyone can join, unless you can provide a good reason why not.
* we would expect there to be an open and transparent joining process, including a right of appeal. For this reason we usually consider proposing and seconding to admit new members as unacceptable.

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Yes | [ ]  | No |

If yes, what restrictions do you have and why do you have them?

Write up to 375 characters, including spaces (about 50 words)

|  |
| --- |
|       |

**18. What is your organisation’s current financial position?**

Select one option and fill in the amounts from your accounts or financial projection.

|  |  |
| --- | --- |
| [ ]  | Information from the latest accounts approved by your organisation |
| [ ]  | 12 month projection because you’ve been running for less than 15 months. This should give your expected income and expenditure for the 12 months from the date your organisation was set up. |
| All organisations, including schools and statutory organisations, need to provide this information. |
| Accounting year ending | Day |    | Month |    | Year |      |
|  |
| Total income for the year | £ |       |
|  |
| Total expenditure for the year | £ |       |
|  |
| Surplus or deficit at the year-end | £ |       |
|  |
| Total savings or reserves at the year-end | £ |       |

**19. Have your accounts been independently audited?**

Not all organisations are required to get their accounts audited (by a registered auditor who gives an opinion on the accounts). Some get them independently examined instead which is a less rigorous external review carried out by an independent person with relevant skills and experience. If your accounts are independently examined and not audited, select No.

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Yes | [ ]  | No |

If yes, give the name and address of your auditor:

|  |
| --- |
|       |

Part three: Your contact details

We need the date of birth and home address for all of your contacts. This includes a previous address if they’ve not lived at their current address for three years.

We use this to carry out some basic identity checks as part of our standard fraud prevention process, so please check that the information provided is correct. All organisations, including schools and statutory organisations, need to provide this.

Our identity check may appear on a credit report, but it’s not a credit check and can only be seen by the person we’re checking, so their credit rating won’t be affected. You can find out more in our **Guide to risk analysis**, available at [www.biglotteryfund.org.uk/informationchecks](http://www.biglotteryfund.org.uk/informationchecks) and the Data Protection policy at the end of this form.

**Primary contact**

**20. Who should we contact if we have questions about your application?**

They must be someone who runs or works for your organisation. We call this the primary contact.

|  |  |
| --- | --- |
| Title |       |
| Forenames |       |
| Surname |       |
| Date of birth (dd/mm/yyyy) |    /   /     |
| Job title or position held |       |

Home address:

|  |  |
| --- | --- |
| Flat number |       |
| Building name/number |       |
| Street |       |
| Town or city |       |
| Postcode |       |
| Have they lived at this address for the last three years? [ ]  | Yes | [ ]  | No |

If no, give their previous home address:

|  |  |
| --- | --- |
| Flat number |       |
| Building name/number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

|  |  |
| --- | --- |
| Daytime phone |       |
| Evening phone |       |
| Mobile number |       |

|  |  |
| --- | --- |
| Email |       |

The email address should be one they use for your organisation. We’ll use this whenever we get in touch about your project.

|  |
| --- |
| If your primary contact has any of the following communication needs, please let us know here. These include things like: audiotape, Braille, a community language, hard copy letter, large print, sign language, Textphone, voice activated software, or something else. Please give details: |

|  |
| --- |
|       |

Which address should we use for any correspondence? Select one:

 [ ]  Main organisation address

[ ]  Home address

 [ ]  Other address

If another address, what is it?

|  |  |
| --- | --- |
| Flat number |       |
| Building name/number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

**Legally responsible contact**

**21. Who in your organisation will be legally responsible for the funding?**

This cannot be the same person as the primary contact. We call this person the legally responsible contact.

The legally responsible contact must be over 18 years old and is responsible for ensuring that this application is supported by the organisation applying, any funded project is delivered as set out in the application form and that the funded organisation meets our monitoring requirements.

|  |  |
| --- | --- |
| Title |       |
| Forenames |       |
| Surname |       |
| Date of birth (dd/mm/yyyy) |    /   /     |

What is their job title or position?

The legally responsible contact must hold one of the following positions. Tick just one box:

|  |  |
| --- | --- |
| **Company** | [ ]  director **or**[ ]  company secretary |
| **School** | [ ]  head teacher |
| **Local authority or health body** | [ ]  chief executive **or**[ ]  director |
| **Town, Parish or Community Council** | [ ]  clerk to the council **or**[ ]  office bearer **or**[ ]  chair |
| **All other types of organisations** | [ ]  chair **or**[ ]  vice chair **or**[ ]  treasurer |

**Tick to confirm the primary contact and legally responsible contact are different people: [ ]**

Home address:

|  |  |
| --- | --- |
| Flat number |       |
| Building name/number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

Have they lived at this address for the last three years?

|  |  |  |  |
| --- | --- | --- | --- |
| [ ]  | Yes | [ ]  | No |

If no, give their previous home address:

|  |  |
| --- | --- |
| Flat number |       |
| Building name/number |       |
| Street |       |
| Town or city |       |
| Postcode |       |

|  |  |
| --- | --- |
| Daytime phone |       |
| Evening phone |       |
| Mobile number |       |

|  |  |
| --- | --- |
| Email |       |

The email address should be one they use for your organisation. We’ll use this whenever we get in touch about your project.

|  |  |
| --- | --- |
|

|  |
| --- |
| If your legally responsible contact has any of the following communication needs, please let us know here. These include things like: audiotape, Braille, a community language, hard copy letter, large print, sign language, Textphone, voice activated software, or something else. Please give details: |

 |

|  |
| --- |
|       |

Part four: Data Protection and Freedom of Information

**Data protection**

If you apply for a grant from us we tell you as part of the application process how we will use your information, but you can view our Data Protection policy below.

We may use the information you give us during assessment and during the life of your grant (if awarded) to administer and analyse grants and for research purposes. We may share this information with individuals and organisations we work with when assessing applications, administering the programme, monitoring grants, evaluating funding processes and impact and carrying out research. These may include accountants, external evaluators and other organisations or groups involved in delivering the programme.

We may also share information with other organisations and individuals with a legitimate interest in Lottery applications and grants or specific funding programmes and with your local Parliamentary representative. We have a duty to protect public funds and for that reason we may also share information with other Lottery distributors, government departments, organisations providing matched funding or for the prevention and detection of crime.

If we transfer personal information to any country outside of the European Economic Area, we will ensure that the information is transferred in accordance with this policy and pursuant to the applicable data protection laws.

We will use any personal information you provide to conduct appropriate identity checks. Personal information may be disclosed to credit reference or fraud prevention agencies which may:

* cross reference personal information with other databases (public or otherwise)
* retain a record of the search
* use your details in the future to assist other companies with verification

If you provide false or inaccurate information in your application or at any point in the life of any grant and fraud is identified, we will provide details to fraud prevention agencies to prevent fraud and money laundering. If you are a company this will include the names of the company directors at the time of the fraud. You must undertake to inform all directors, Trustees and Committee members of this notice.

You can obtain further details explaining how the information held by fraud prevention agencies may be used by emailing dataprotection@biglotteryfund.org.uk, by telephoning our advice line on **0345 4 10 20 30**, or by writing to:

Customer Services
Big Lottery Fund
2 St James’ Gate
Newcastle upon Tyne
NE1 4BE

Personal data requests are dealt with under the Data Protection Act 1998. If you want to know whether we hold personal information about you, you should email dataprotection@biglotteryfund.org.uk

We may withhold access to your information where we have the right to do so under [The Data Protection Act 1998](http://www.legislation.gov.uk/ukpga/1998/29/contents)

[ ]  We’d like to keep in touch with your organisation about the Big Lottery Fund including information about new funding programmes and other Lottery good causes. If you’d rather not receive this type of information, please tick this box.

**Freedom of Information Act**

The Freedom of Information Act 2000 gives members of the public the right to request any information that we hold. This includes information received from third parties, such as, although not limited to grant applicants, grant holders and contractors.

If you think that there is information in your application that may be exempt from release if requested, then you should let us know when you apply. We will not usually release information about your project whilst it is being assessed. Otherwise we will use our judgement as to whether any exemptions may apply, which we may seek your opinion on. Personal information would be withheld subject to the requirements of the Data Protection Act 1998.

Part five: Your declaration

By submitting this application you confirm that:

[ ]  the legally responsible contact named in question 6 and the board or committee that runs the organisation, have authorised this application

[ ]  you agree we may use the information you have provided for the purposes described under Data Protection above

[ ]  you accept that if information about this application is requested under the Freedom of Information Act we will release it in line with our [Freedom of Information Policy](http://www.biglotteryfund.org.uk/about-big/customer-service/freedom-of-information) which you can find at [www.biglotteryfund.org.uk/about-big/customer-service/freedom-of-information](http://www.biglotteryfund.org.uk/about-big/customer-service/freedom-of-information)