

ONLINE FORM QUESTIONS AND GUIDANCE NOTES

Updated January 2011

Please use clear, plain English and refrain from using jargon or acronyms. Trustees would prefer the terminology to be kept simple. *** Indicates mandatory field**

Section A	
A1	*Organisation's Full Legal Name This is the official name of the organisation making the application.
A2	Other Name (if applicable) This is the name or acronym that the organisation is more commonly known by, e.g. ICON instead of Institute of Conservation.
A3	*Address , *Telephone Number, Website Address This is the mailing address of the organisation making the application. Please give the main telephone number for the organisation plus a website address if you have one.
A4	*Which of the following best describes your organisation's status
A5	Charity Number (if applicable)
A6	Society Number (if applicable)
A7	Number of Employees

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A8	<p>*Briefly tell us about your organisation (no more than 1000 characters, approx 150 words)</p> <p>This should be a brief snapshot of the organisation. The snapshot should say something about the organisation's history, number of staff and geographical area it works in. It should also include details of any recent significant achievements or activities.</p>
A9	<p>*Describe your organisation's aims and objective (no more than 1000 characters, approx 150 words)</p> <p>Explain clearly the organisations aims and purpose and how it seeks to achieve its goals.</p>
A10	Please give the names and contact details of two people authorised as signatories e.g. Trustees
A 11	<p>What was the total, restricted and unrestricted annual income of your organisation in the most recent financial year?</p> <p>Total £</p> <p>Restricted £</p> <p>Unrestricted £</p>
A12	<p>What was the total, restricted and unrestricted annual expenditure of your organisation in the most recent financial year?</p> <p>Total £</p> <p>Restricted £</p> <p>Unrestricted £</p>
A13	What was the total net asset for your organisation in the most recent financial year?
A14	When does your financial year end?

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A11	<p>*Main Contact Name (title/first name/surname) This is the person that will be contacted if there are any questions regarding the project. This is the name of the person who will be able to deal with any queries about the project, either during or after the assessment stage.</p>
A12	<p>*Position held within the organisation This refers to the job title or role held by the person named in A15</p>
A13	<p>Address (if different from organisation address) This is the address of the main project contact. This is the address that will be used for all future written communication.</p>
A14	<p>Telephone Number This is the telephone number that is best for us to contact you on.</p>
A15	<p>*Email Address (please ensure that this address is correct as it will be used in future communication) This is the email address that you wish us to use if we need to contact you about the application.</p>
Section B	
B1	<p>*Please select the scheme that you are applying to Please select the appropriate Fund. Choose the 'Main Grant Fund' option if you are applying for <i>more than £5,000</i>. If your application is for more than one year and the combined total for the years is greater than £5,000 you must select the 'Main Grant Fund' option. Choose the 'Small Grant Fund' if you are applying for <i>£5,000 or less</i>.</p>
B2	<p>*Project Title and Summary (e.g. Project Breeze, looking at the effect of wind on the development of coastal communities. Maximum of 20 words) Give the name of the project and follow with a brief explanation if the emphasis of the project is not immediately clear</p>

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	<p>from the title. Example: 'The Needle Exchange Project 2008' does not need any further explanation but 'Request for Support' will need to be explained. Please note that we will be using the title and summary in all future correspondence so please ensure that it is clear.</p>
B3	<p>*Please select the appropriate programme for your application Select the programme that your project falls under. Note: The programmes reflect the broader interest areas of The Trust.</p>
B4	<p>*Please select the category that best fits your application Select the classification that is the most relevant to your project. It may be that the project covers several categories but you must select the most relevant. Note: The choices in the drop-down menu are groupings narrowed down from the broader interest areas in B2.</p>
B5	<p>*Please select the region where the majority of your work will be undertaken Please select one region. It may be that your project is distributed over several regions but you must select the main region that the project covers.</p>
B6	<p>*Describe the project (maximum of 1,000 characters including spaces, approximately 150 words) This section is to help us understand exactly what the project is seeking to achieve. To do this you must give a succinct executive summary of the entire project. This should include an overview of the project, the problem, the need and how (if at all) it fits into a larger project.</p> <p>Please note that some of the points included here will need to be explained further in questions B7 – B9</p>

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B7	<p>*What is the problem you are seeking to address and how have you identified the problem (maximum of 1000 characters including spaces, approximately 150 words)</p> <p>This section is to help us better understand the problem that the project is seeking to address. Here you should explain in greater depth the scale, importance and urgency of the problem, cite any influencing factors, say how the problem was identified and whether research has been done to identify the need for the project and include any other information that you consider relevant to this question.</p>
B8	<p>*How do you intend to tackle the problem (maximum of 1000 characters including spaces, approximately 150 words)</p> <p>Use this section to tell us what you plan to do about the problem and how you intend to implement your plan.</p>
B9	<p>What experience do you have of similar projects (maximum of 1000 characters including spaces, approximately 150 words)</p> <p>Use this section to expand on your organisation's track record of delivering similar projects - either as a stand-alone unit or working in partnership with other organisations.</p>
B10	<p>Give details of the people who would be key to the delivery of the project and explain how they are qualified to be involved (maximum of 850 characters including spaces, approximately 120 words)</p> <p>Use this section to give the name, position, qualifications and relevant experience of the key people involved in the project delivery.</p>
B11	<p>*How will the project be monitored and how will its success be evaluated (maximum of 1000 characters including spaces, approximately 150 words)</p> <p>Use this section to explain your monitoring process e.g. records, reporting, benchmarks etc. Say how the project's success will be evaluated e.g. how will the effects/achievements be measured and interpreted, how will lessons learnt be, used for future improvements, disseminated to others etc.</p>
Section C	

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C1	<p>*What sum are you requesting from The Pilgrim Trust (if you are asking for support for more than one year, give the total value for the entire period) Give the total that you are requesting; for example, if you want £10,000 each year for three years, then put in £30,000</p>
C2	<p>Over how many years do you want the funding to run (only fill in if you are applying for a grant for more than one year) Only answer this question if you are requesting funding for more than one year. Please see C1</p>
C3	<p>What is the total cost of the project Give the total cost of the entire project. For instance, if you have requested £10,000 from us but need £50,000 to deliver the project, it is the £50,000 value that you need to give.</p>
C4	<p>How much of the project funding requirements have you already secured and from whom (maximum of 1000 characters including spaces, approximately 150 words) Give the names of each of the funding organisations or contributor and the value of their contributions.</p>
C5	<p>Who else are you applying to for funding and how much are you requesting (maximum of 1,000 characters including spaces, approximately 150 words) Give the names of each of the organisations that you have approached for funding, the sum you have requested and when you expect to have a response to your request.</p>
Section D	
	Essential Information
D1	Latest audited accounts and report
D2	<p>Project Plan and Budget The Project Plan should show clearly how and when the project's objectives will be achieved. This is done by showing the important targets, activities and resources/products that are needed. Your Project Plan and Budget should therefore show</p>

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	timescales, stages or phases (where relevant), deliverables, include the total cost of the project, any contributions (real or anticipated) from other funders and the cost that you are asking us to contribute to. Generally we do not expect this to be more than 3-4 pages
	Other Supporting Document You may, if you wish, send us other information in support of your application.
D3 – D9	<p>If your application is for:</p> <ul style="list-style-type: none"> • Staff salary costs - send the relevant job descriptions and person specifications. • Repairs to historic buildings - send assessments from the conservation architect and/or structural report, contractors' quotation, maintenance plan etc. • Conservation of contents - send conservator's estimate <p>If appropriate send relevant evaluation reports</p>

Additional Points to Note

Character limits: All the text boxes are restricted in length. The restriction (shown on the form) refers to the number of characters, not the number of words. When completing the form you must keep this in mind as spaces, quotation marks, numbers, symbols etc. all count as characters. It is recommended that, with the longer-length boxes, you produce the text in a Word document. You can easily check the number of characters and then copy and paste the text into the online form.

Attaching documents: It is recommended that you avoid attaching numerous illustrations, pictures or drawings as, depending on your internet connection, this could take a long time to upload. We are also unable to store large files.

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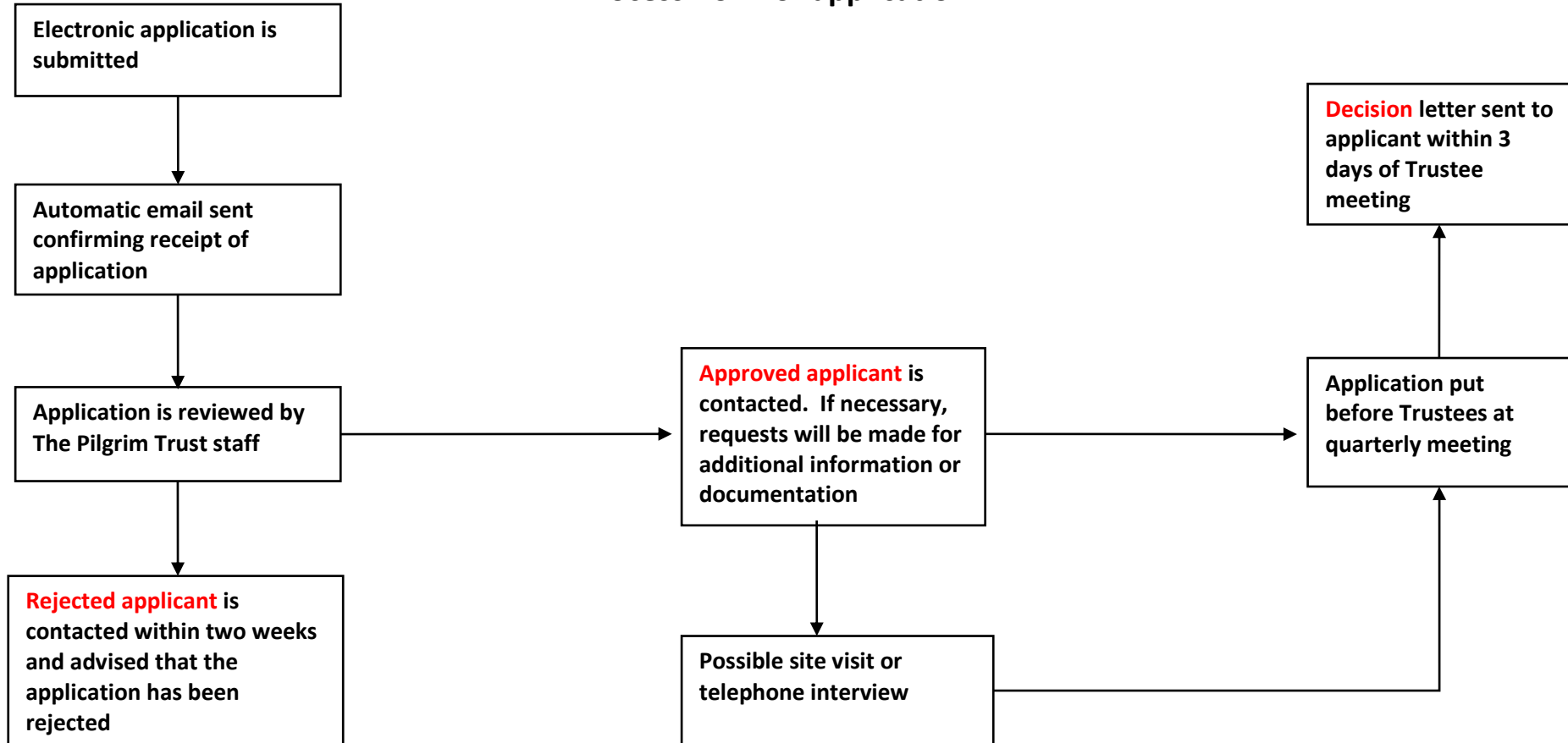
*** Indicates mandatory field**

Email addresses: After you have submitted your application, most of the follow-up communication will be done by email. It is therefore essential that you enter an accurate email contact.

Clarification: If you need any more information or want to clarify a point, you can contact us at: info@thepilgrimtrust.org.uk or call on 020 7222 4723.

GUIDANCE NOTES

Process flow for application



Application submitted

Decision

Timeline
usually 4 - 6 months