

The Wolfson Family Charitable Trust operates a two stage application process. These guidance notes are issued to organisations that have been invited to submit a Stage 2 application to help you frame your application and are accompanied by a *Summary Sheet*.

If there have been any significant changes to your project since the submission of your Stage 1 application, please contact us before completing a Stage 2 application.

Application content

1. Cover letter

A cover letter signed by the Chief Executive or equivalent.

2. Organisation profile

Provide a brief introduction to the organisation, including history and notable achievements, as well as current aims and future plans.

3. Project details

- a) Outline the project in lay terms. This should focus on the specific area for which funds are being sought but should be presented in the context of the wider project, if relevant.
- b) Briefly describe the aims and expected outcomes of the project.
- c) Include any information that will help us understand the importance of and demand for the project
- d) If the project is not based at the organisation's main address, please make clear the location of the project.

Additional details

For new build or major refurbishment projects, provide an artist's impression of the building or floorplans, if available. Please also detail whether planning permission and listed building consents are required for the project and, if so, have been obtained.

For projects supporting people with special needs, please include a description of the selection policy for users of the facilities and the systems in place for monitoring standards of care.

For projects related to historic buildings, describe the listed building grade and the building's significance in a national context. Please also give current and projected annual visitor figures and information on planned public access.

For museum or gallery projects, please give current and projected annual visitor figures, and details of the collections that will occupy the new/refurbished spaces.

4. Project timetable

Give an indication of the anticipated timetable for the project.

Please note that awards cannot be made for work that is completed before the Trustees consider your application.

5. Finance

This section should include:

- a) The total cost of the project and a cost breakdown. If the project is phased, the cost of each phase should be given. Professional fees and VAT should be indicated separately.
- b) The amount and source of funds already received and/or pledged, and the plan for raising the balance. Please also include a list of any forthcoming funding decisions, with dates (if known).
- c) For capital projects, estimates of the subsequent running and maintenance costs of the completed project and a summary of how these will be met; and assurance that the project has been or will be subject to competitive tender.

Reviewer process

You may nominate an independent reviewer, who should have some knowledge of the proposed project and be aware of the application to the Wolfson Family Charitable Trust. Please provide their name, address, telephone number and email address on your *Summary Sheet*. There is no obligation to nominate a reviewer.

Your application will also be sent to independent reviewers chosen by the Trust. Following this, we may ask you to supply further information or respond to queries that have been raised.

Format and submission

The **main application** should be no longer than 10 sides. Technical information, images or other supporting documents may be attached as appendices but should be kept to a minimum.

Your application should be accompanied by a **Summary Sheet**. A copy is enclosed with these guidance notes and an electronic version is available on request from the Wolfson office.

We require **15 hard copies** of your application, which should be collated but not bound (paperclips are fine) and **1 copy** of your *Summary Sheet*.

We also require **an electronic version** of your application and *Summary Sheet*. These should be two separate files and be emailed to the address provided in the letter inviting you to apply.

Deadline

Your Stage 2 application should reach us by the date specified in the letter inviting you to apply.