

Application guidelines

These guidelines are issued to organisations that have been invited to submit a stage 2 application under the Health & Disability programme. Please contact the grants team (020 7323 5730) before starting your application if there have been any significant changes to your project since the submission of your stage 1 application. These guidelines are regularly updated so please check our website to ensure you are following the latest version.

Deadlines

Stage 2 applications should reach us by either 1 March (for a June decision) or 1 September (for a December decision), unless another deadline date has been agreed.

Content

Your stage 2 application should contain the following information, as well as any additional details requested in your invitation letter.

1. Cover letter

A cover letter signed by the Chief Executive or equivalent.

2. Organisation profile

- a) A short introduction to the organisation including its history, notable achievements, current aims and future plans.
- b) A description of the selection and/or referral policy for users of the facility, where appropriate.
- c) Details of your regulatory body and the most recent inspection. If this is not applicable, a short explanation of why the organisation is not regulated.
- d) Details of the body/bodies that you report to on safeguarding and details of the person responsible for safeguarding for the project. You should declare whether there have been any significant safeguarding incidents within the past year. If you have a safeguarding policy, this should be attached as an appendix.
- e) Information about any evaluation of the service, including its outcome.

3. Project Details

a) Brief summary

This should focus on the specific area for which the funds are requested, presented in the context of the wider project, if relevant. The letter inviting a full stage 2 application may indicate specific areas on which the application should focus. If the project is not based at the organisation's main address, please make clear the location of the project.

b) Clear evidence of the need for the project

Whether a new initiative or an expansion of existing services

c) Aims and outcomes

Describe up to three aims and outcomes for your project, providing specific detail of what will be achieved and how. At least one of these should reflect the Wolfson Foundation's aims below:

- Increased access to services for new and existing users
- Improved quality and range of services
- Improved financial stability of the organisation

An example of how to present your project's aims and outcomes is available at www.wolfson.org.uk/funding/application-guidance. If your application is successful, you will be asked to report on the project's progress in relation to these aims.

d) Project timetable

Give an indication of the anticipated timeframe for your project (i.e. when work will start and finish or when purchases will be made and equipment installed). Awards are not made retrospectively, therefore the project must be ongoing after the date of the award.

e) Artist's impression of the completed project, if applicable

We suggest you include 3-4 relevant architect's drawings or floor plans, which can be included within the main body of your proposal. Longer technical attachments are not usually required, but may be sent as a separate appendix.

f) Ownership, lease and planning permission details

If leased, please specify the length of the lease. Please detail whether planning permission/consents are required and if so when they were obtained. Unless otherwise agreed, planning permission should be in place before submitting your stage 2 application.

4. Finance

a) Total project cost and breakdown

The breakdown of costs should list the cost of each element/stage, with VAT and professional fees indicated separately. Please note that VAT costs should be provided even if recoverable. For phased projects, the cost of each phase should be given, as well as the total project cost. Specific figures should be given for all costs and not be rounded.

b) Funding options

Highlight elements of the project to which a grant might be allocated, including their cost, e.g. specific rooms or areas, fixtures or fittings, or equipment. VAT should be indicated separately. While applicants are not encouraged to request a specific amount, the Foundation may link an award to one of these areas.

c) Fundraising summary

List the amount and source of funds already received and/or pledged, and the plan for raising the balance. For phased projects, present the funds raised towards each phase. If funds are not restricted to a particular phase this should be indicated. Please also include a list of any forthcoming funding decisions (with dates). Unless otherwise agreed, applications are considered only when at least 50% of the necessary funds have been raised.

d) Running and maintenance costs

You should state whether or not your running and maintenance costs are expected to change. Increases in running and maintenance costs should be explained, including a summary of how these will be met.

e) Assurance that the project has been/will be subject to competitive tender

It is expected that projects are put out to competitive tender.

Please ensure you refer to your invitation letter for any additional financial documents we require. An example of how to present your project's financial information is available at www.wolfson.org.uk/funding/application-guidance.

Format

Applications should be no longer than 6 sides (excluding cover letter and any appendices) on A4 size paper. Text should be no smaller than font size 12.

Technical or further information may be attached as appendices, for example, images, building plans or evaluations. These appendices should be kept as concise as possible and be no larger than A4.

Applications must be standalone documents (i.e. not reliant on information previously provided or contained in other documents such as promotional flyers or annual reports).

In addition to the application itself, an application summary sheet should be completed. This is available to download at www.wolfson.org.uk/funding/application-guidance.

Submission

Submit your application via email to the Programme Manager named in your invitation letter.

The submission should comprise:

- A PDF of the summary sheet
- A PDF which combines the covering letter and main application
- Any appendices which we have requested as separate attachments (safeguarding policy, evaluation, business plans, financial forecasts)

The summary sheet must include details of the person who should be contacted in case of a query about the application.

Applications that do not conform to these guidelines may not be accepted.

Review process

Nominated reviewer (optional)

Applicants may nominate an independent reviewer. This should be someone who is independent of your organisation (and not retained by them). They should: have some knowledge of the project; be aware of the application to the Wolfson Foundation; be able to provide a helpful perspective on the project and its merits, either as someone from within the relevant sector or discipline, or who knows the local area in which you operate.

Please provide their name, address, telephone number and email address on your summary sheet. There is no obligation to nominate a reviewer.

Feedback

Your application will also be considered by independent reviewers chosen by the Foundation and a specialist panel who make recommendations to the full Board of Trustees. During this stage we may ask you to supply further information or respond to queries that have been raised.

Further information on our review process is available at <http://www.wolfson.org.uk/funding/application-guidance/review-process/>