Stepping Stones

How to apply for a grant

City Bridge Trust wants to support high quality work that will help us meet our priorities. These guidelines are intended to help you understand our application process and the information we need to consider your grant request.

If you require our application form or related guidance in alternative formats such as large print, Braille or audio tape please contact us at citybridgetrust@cityoflondon.gov.uk or on 020 7332 3710 to discuss your needs.

The form is compatible with screen-reader software. To increase the font size, please use the "zoom" function within your browser.

How to complete the online application form

Web browser

The following browsers have been certified compatible with the online application software: Internet Explorer 8, 9, 10 & 11; Mozilla Firefox (for PC and Mac); Safari (for PC & Mac); Google Chrome.

Browsers are tested and certified using default settings and should be the latest version available with the latest updates installed.

You should ensure that you have a strong and stable internet connection when accessing the form as any loss in connectivity could result in a loss of data.

Creating an account

To make an application you will need to set up an online account using an email address. You will be asked to set a password which you will need to access your application. If when creating an account you receive a message "Invalid e-mail or password" this may mean that you already have an account with this address, or the password entered doesn't meet the requirements. To check, use the "Click here to reset your password" button.

We will use the e-mail address provided by you on the online form as the main way of contacting you. It is vital that you let us know if any of your contact details change and that you ensure that the e-mail account remains active and is able to receive messages. You should check your e-mail on a regular basis once you have submitted your application.

Saving your work

You can save your application and return to work on it at a later time using the "Save and Exit" button at the bottom of each page. Please wait for the page to refresh after clicking this button. You should then receive an automated e-mail containing all of your responses saved to date. Please check this carefully to ensure that your work is successfully saving.

We recommend saving your application regularly whilst you are working on it and not remaining on a single page for longer than 60 minutes as this may cause the form to time out. After saving, you should receive an automated e-mail.

You should also retain a Word copy of any long text responses as a backup as we cannot retrieve any lost work. However, when pasting any text into the online form you should check this carefully for formatting errors, particularly in relation to special characters and bullet points. If possible, you should convert this into a Rich Text or Plain Text format using a programme such as Notepad.

Navigating within the form

To move onto the next section, click the "Next page" button at the bottom. You may also move around the sections by clicking on the numbered page titles at the very top of the form.

If you are unable to move to a different page, this may be due to errors with your responses – this will be shown by red text and a warning triangle ⚠ next to the question. You must resolve this issue before moving on.

Do not use your browser's "back" button to navigate as this may cause you to lose your work. When leaving the site please use the exit link/button to leave the portal (not just close the tab/browser)

Completing the questions

Questions on the online form with a ◆ symbol are compulsory and you will not be able to submit the form if these are left blank.

For some questions there is a word limit. The word count is shown below the text box and shows how many full words you have used out of the limit. For long text fields we recommend retaining a back-up in Word, however if you are copying your answers from another source (e.g. web page, PDF or Word document etc.) then please copy the text into Windows Notepad/Macintosh Notes first, then copy from there into the long text field on the form. This is to remove all formatting and special characters, bullet points, tables etc. including any that maybe hidden as this may cause errors.

For financial and other numerical questions please enter **only** numbers and no other text. Do not enter pound signs (£), commas or full stops. For financial questions, please round your answer to the nearest pound and do not enter pence. If the field is marked as required enter '0' where the answer is nil.

For information on how to complete specific questions, click the "i" symbol ℹ️ next to the question.

Attachments

We ask for a number of supporting documents to be submitted with your application. Please refer to the **Supporting Documents Guidance** to make sure you submit the correct information.

Returning to your application

To log back into your account please use the link in your automated e-mail and on our website which is https://www.grantrequest.com/SID_437/?SA=AM

Please note that if the form isn't accessed for 120 consecutive days it will automatically be deleted from the server and cannot be retrieved.

The application process

Before you apply

Before making an application please make sure you have read our Stepping Stones programme details carefully as we are not able to fund work that does not help us meet these programme outcomes.

How the application process works

To apply for a Stepping Stones award you need to complete an online application form and submit this with your supporting documents to the Trust. Details of how to do this and what documents to include are given below.

The application form is your chance to tell us more about your organisation, the work you would like us to fund and why. Please answer the questions in the application form as fully as possible. The questions are not intended to 'catch you out' but help us understand whether City Bridge Trust is likely to be able to support your work.

Once the City Bridge Trust has received your online application and all supporting documents it will be passed to one of the Trust's Grants Officers for assessment. As part of this process a Grants Officer may contact you for more information. A Grants Officer may also arrange to visit your organisation as part of the assessment process. Once a full assessment has been completed your request will be referred to the City Bridge Trust Grants Committee for a decision.

The Grants Committee meet regularly and applications are accepted throughout the year for all of our current funding programmes. All applicants are advised in writing of the Grants Committee's decision on their application within a few days of the relevant Grants Committee meeting.

It usually takes about 4 months from receiving your complete application until a final decision is reached and you should take account of this when planning your project.

Tips for completing your application

- Try to avoid the use of abbreviations (e.g. use "European Social Fund" rather than "ESF"), jargon or technical terms.
- Answer all questions in full and do not simply refer to attached documents. Your answers will be used by the Trust's Grants Committee to consider your application. However, any other attachments, including your detailed proposal, will not be seen by them.

Guidance for specific sections of the online application

About your organisation

Section A: Organisation background

- **Name of your organisation**: This should be your organisation's legal name, as it appears on your governing documents, bank account and Charity Commission register.

- **If your organisation has a previous name or is also known as something different to your legal name, what is this?** This could include shortened forms of your organisation's legal name or acronyms. Please leave this blank if it is not relevant.

- **If your organisation is part of a larger organisation, what is its name?** If you are the subsidiary of another organisation, or are affiliated to a national body, please enter this here.

- **Address for correspondence**: Please enter your organisation's full address and postcode. If you are unsure of your correct postcode, please check at: www.royalmail.com/postcode-finder/
Please remember that City Bridge Trust can only fund work which benefits residents of Greater London.

- **In which London Borough is your organisation based?** Select a borough from the drop-down list, or select 'Outside London' if your organisation is not based in Greater London.

- **Position within the organisation**: Please enter your full position (e.g. Chair or Treasurer) or job title.

- **Phone:** Please enter your main contact telephone number. We would prefer this to be a landline where possible.

- **E-mail:** It is essential that you enter a valid e-mail address that you will check regularly as this is what we will use to contact you about your request for funding. Remember to update us if the email contact details for this request change.

- **Organisation website & social media accounts**: Please enter these details if applicable. For Twitter accounts please enter your username, e.g. @CityBridgeTrust

- **Member of staff responsible for finances:** This may be your Chief Financial Officer or Chief Executive. It should be a <u>paid</u> staff member, and not your Treasurer.

- **What Quality Marks does your organisation currently hold:** For example PQASSO, Investors in People. If you are applying under our Advice & Support programme you should include details of any recognised management qualification and/or advice quality standard, e.g. [Advice Quality Standard](#); [Specialist Quality Mark](#); [Lexcel Practice Management Standard](#).

Section B: Legal Status

- **Legal status of organisation**: Please select the status which most closely describes your organisation from the drop-down list. If you are registered with the Charity Commission but not Companies House choose 'Registered Charity'. If you are registered with both the Charity Commission and Companies House choose 'Charitable company'.

- **Registration numbers:** Please enter all Charity, Company, Charitable Incorporated Company, or Bencom registration numbers which relate to your organisation.

- **When was your organisation established?** If exact date isn't known, enter an approximate date in the correct year.

- **Objectives of your organisation:** What is your organisation set up to do? These are your aims as set out in your mission statement, articles of association or constitution.

- **Main activities of your organisation**: What does your organisation do on a day-to-day basis? These are the main activities or services you provide in order to meet your aims.

Section C: Your Staff & Volunteers

- **Full-time:** Enter the number of full-time staff employed by your organisation. Enter 0 if none.

- **Part-time**: Enter the number of part-time staff employed by your organisation. Enter 0 if none.

- **Trustees / Board members**: Depending on your legal structure this might also be known as your Board of Trustees or non-executive directors.

- **Active volunteers other than Trustees / Board Members**: Enter the number of volunteers who have a regular and frequent commitment with your organisation, not including trustees.

- **Do you have a safeguarding policy:** Please tick if yes. You should then upload this in the attachments section. For more information on Safeguarding, please see our website here.

Section D: Property occupied by your organisation

- **If leased/rented, how long is the outstanding agreement?** Please note that if you are applying for capital access works, we would expect you to have at least a 10 year lease on the building.

Section E: Environmental impact

We are interested in knowing what action you have taken in the past year to progress environmental sustainability principles and practice in how you run your organisation.

This could include telling us about reduced energy use through monitoring of utility bills and/or moving to green tariffs; waste reduction through recycling of materials and reuse of equipment; training your employees, volunteers, service users and /or clients to adopt 'green' practices.

If you would like to do more to reduce your environmental impact why not apply for one of our Greening the Third Sector scheme's free eco-audits these grants are additional to any other funding you may receive from City Bridge Trust. You can find out more on our website: http://bit.ly/eco-audits

Finance details

Section F: Organisation finances

Please complete the table below for your whole organisation's finances. If you are part of a larger organisation which is legally responsible for any funding you may receive then please provide the figures for that organisation.

If you are a charity these accounts should be available to download from the Charity Commission website.

For all questions in this section please enter only numerical figures with no punctuation or pound signs. If you do not have a figure for any category please enter 0.

Income headings:

- **Grants & donations:** e.g. gifts, donations, membership fees, sponsorships, unrestricted or 'core' grants.

- **Earned income:** e.g. the sale of goods/services as part of the direct charitable activities of the charity. This includes grants and contracts for activities to further your objects.

- **Total income**: this should be the total of the Income figures you have entered.

Expenditure headings:

- **Cost of raising funds:** e.g. costs actually incurred in inducing others to make gifts/donations, fundraising, trading, costs of obtaining investment advice, rent collection, administration of investments.

- **Total Expenditure:** this should be the total of the Expenditure figures you have entered.

- **Free unrestricted reserves held at year end:** This excludes fixed assets but should include designated funds.

- **What is your organisation's reserves policy?** This should be the formal reserves policy as agreed by your governing body. If you are a charity your organisation's financial reserves policy should be stated in your annual accounts. This sets out the level of free unrestricted funds that your organisation aims to set by to cover unforeseen circumstances such as gaps in funding, redundancy costs, rental costs and other liabilities. If you are not a charity you may not be required to have a reserves policy. Please state 'not relevant' if this is the case. If your reserves policy is longer than 100 words please provide a summary and let us know this is not the full description. To find out more about reserves visit the Charity Commission website: http://www.charitycommission.gov.uk/media/93927/cc19text.pdf

Section G: Statutory Funding

- **For your most recent financial year, what % of your income was from statutory sources?** This does not need to be an exact percentage - please select the closest range from the drop down list.

Section H: Organisational changes

- **Describe any significant organisational changes to your structure, financial position or core activities since the date of your most recent accounts**: This should include any changes in key members of staff or management committee; any major changes to your funding situation; significant changes to your activities or services; change of legal status; or any major changes to your premises. It may well be that nothing has changed substantially, in which case please answer 'none'.

Grant request

Section I: Details of grant request

- **Under which of City Bridge Trust's Stepping Stones Fund strands are you applying?** The Stepping Stones Fund was created in recognition of the gap between the grant finance available for organisations and the requirements of organisations that seek to secure social investment. Stepping Stones wants to provide targeted support in the form or grants and risk finance to test out the viability of different propositions. In this way, the fund helps to de-risk any future investment, whether it is the City of London Corporation considering an investment, or any other investor. The Stepping Stones fund will consider applications under the following strands:

  1. Capacity building grants for charitable organisations:

  to provide organisations with human, financial and strategic support as well as supporting access to appropriate expert intermediaries to enhance their overall performance skills to meet their mission, deliver their outcomes and thereby enhancing their investment readiness and long-term financial stability. Proposals for the capacity building strand need to show a clear link between the targeted capacity increase and the applicant's sustainability and social investment readiness and how that leads to improved social outcomes. The Trust awards no more than £50,000 per organisation under this strand.

  2. Grants to pilot better outcomes:

  to support organizations wishing to pilot new ways of creating improved social outcomes in a specific sector, geography or outcome area; test out new ideas, new business models, new partnerships and ways of working as well as alternative ways of measuring complex outcomes. Proposals for piloting outcomes are expected to be beyond the idea or start-up phase; they should include a clear business concept and hypothesis about the targeted social outcomes. The pilot should lead the organisation to using social investment for expansion or further development; this

should be explained in the proposal. If the pilot needs the improvement of certain capacities within the organization, capacity building could be included in the proposal with appropriate justification. The Trust awards no more than £50,000 per organisation under this strand.

- **Please describe the purpose of your funding request in one sentence:** This is used as the title of your work in the summary that goes to our grants committee so it is important to make your description as clear as possible within the text limit of 25 words. You are given the opportunity to provide more details about your request in subsequent questions.

- **When will the funding be required to start?** Please bear in mind when planning your work that it can take up to 4 months to assess your application and that we cannot fund retrospectively.

- **How much funding are you requesting?** Enter the amount in whole pounds, using numbers only. Please specify how much funding you require in each 6 month period. When deciding how much you are requesting, you should consult our guidelines and bear in mind that we will not fund more than 50% of an organisation's total revenue income. There is no minimum amount, but the maximum grant amount under strands 1 and 2 is £50,000. However, it is not our policy to award large grants to small organisations. Your proposal and the budget need to be realistic and reflect that you thought through the costs and possible revenues.

- **Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how will you resource it?** Stepping Stones grants last no longer than 18 months. The Committee will need to be satisfied that you have a reasonable plan for alternative funding at the end of the Trust's funding period.

Section J: Referee

- **Referee:** Please make sure the referee is one of your organisation's current or recent funders and that they have given their permission to act as a referee. For example this could be your grants officer from a grant-making trust or local authority.

- **Referee address:** Please include the postcode in the address box.

Section K: What 3 main differences or outcomes do you want to achieve through your funding proposal?

Please include no more than 3. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment. For example:

- Using our new business plan, we will be able to apply for a working capital loan to XY bank

- More disabled young people will be able to find jobs and improve their livelihood as a result of our workshops. We will be able to sell those workshops and our placement services to the local council.
- We will obtain the first investment from a social business angel, which will enable us to open a new location and thus extend our paid services to 200 new beneficiaries
- How will you know, whether you are achieving those social outcomes? When responding to this question, please, describe how you plan to monitor your progress and what indicators you would use to measure it.

Section L: What are the main activities or outputs you will deliver to achieve these differences?

Please include no more than 3. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific, for example:

- Two of our team members will attend a business planning course in March-June
- We will pilot delivering 10 workshops to provide disabled young people with information and skills as they move into adulthood.
- We will approach social business angels with a specific investment request in Q1 of the coming Financial Year

Section M: You and your grant request

In addition to the series of questions in this section, you may, if you wish, provide fuller details in a separate more detailed proposal. However, this should be additional information and not simply a duplication of what is in the form.

Please note that the Grants Committee will only see the answers provided on the online form so it is important that you provide a clear summary of your request.

Section N: Funding required

All the questions in this section refer to the specific project or area of work for which you are applying, NOT your organisation as a whole. If you have more expenditure or income lines than are available please group these on the form and provide a fuller breakdown in your detailed proposal. For more information see the **supporting documents guidance.**

- **What is the total cost of the proposed activity/project?** In this section you should include all costs associated with the piece of work, even if you are not asking the Trust to fund the whole amount.

- **How much is requested from the Trust?** List here all the costs you want the Trust to fund from those listed in the "Funding required for the project" question. These may be the same if you are asking us to fund the whole of the project.

Declaration

The declaration and data protection statement should be agreed by an authorised representative of your organisation. For example, this might be the staff member completing the form, your Chief Executive or a trustee. This should not be a consultant working on behalf of your organisation.