



**Thrive guidelines before applying to ensure your application meets the programme criteria.**

You can use this template to prepare your application before copying the information into the online form, but you cannot send us your final application on this word template.

The questions highlighted with an \* are mandatory on the online form.

**All applications must be submitted using the online application form** available on our website [www.bankofscotlandfoundation.org](http://www.bankofscotlandfoundation.org)

## 1. About your organisation

* Name of your charity as per OSCR	
* Your charity registration number as per OSCR	
* Main contact title	
* Full name of main contact	
* Job title of main contact within charity	
* Correspondence address	
* Town/City	
* Postcode	
* Email	
* Telephone	
<b><i>If we have any questions in respect of your grant application, we may contact you by telephone to request further information. Please provide an alternative contact person in the event of any holidays or absence.</i></b>	
* Alternate contact name	
* Alternate contact phone number	
* Please confirm that your charity income for the last year is <b>between £50k-£300k (as per your most recent signed Annual Accounts submitted to and checked by OSCR)</b>	<input type="checkbox"/>
* Your income ( <b>as per your most recent signed Annual Accounts submitted to and checked by OSCR</b> )	
* Number of full-time paid staff:	
* Number of part-time paid staff:	
* Number of volunteers (enter 0 if you have none):	
*Please confirm that your charity puts vulnerable people at the heart of everything it does (Please note that you will be asked to expand on this in your supporting document).	<input type="checkbox"/>



## 2. About the grant

* I understand that I am applying for a three-year unrestricted grant of £75,000 (£25,000 per annum).	<input type="checkbox"/>
<b>Please note that you are applying for unrestricted funding towards core costs, delivery costs, project costs and/or general running costs.</b>	
<b>If your charity offers financial resilience related activities but this is not your core purpose, unrestricted funding can be used solely on any reasonable costs associated with delivering the focus area of financial resilience e.g. core costs, project costs, delivery costs, salary costs.</b>	
* Please provide a broad indication of what our funding may be used for such as administration staff salaries, rent for office space, materials for workshops.	
* Please select if you track any of the following outcomes for the people that use your services and can provide updates to the Foundation as part of your annual grant evaluation (please note if you do not, this will not affect the outcome of your application).	<input type="checkbox"/> Can better anticipate and adapt to unexpected changes. <input type="checkbox"/> Experience improved mental health or reduced financial worry. <input type="checkbox"/> Have increased awareness of and access to advice services, benefits, and support. <input type="checkbox"/> Gain confidence and skills to manage their finances effectively. <input type="checkbox"/> Transition into or back into mainstream banking. <input type="checkbox"/> Access financial tools and education to avoid or plan for crises. <input type="checkbox"/> Reduce their reliance on problem debt. <input type="checkbox"/> Achieve long-term financial stability
* Approximately how many people will benefit from the grant each year?	
<b>* Who else have you asked for funding in the last 12 months? Please list in date order with the most recent first.</b>	
1. Name of fundraising organisation	
Amount requested	£
What was the outcome?	Choose an item.
2. Name of fundraising organisation	
Amount requested	£
What was the outcome?	Choose an item.
3. Name of fundraising organisation	
Amount requested	£
What was the outcome?	Choose an item.



### 3. Supporting documents

**You must have at least two-years of Annual Returns submitted to and checked by OSCR. We cannot proceed with your application you if you do not upload your MOST RECENT Annual Accounts submitted to and checked by OSCR.**

\* You must submit a file that is a maximum size of one A4 page and no more than 500 words. Please use your A4 page to tell us for example: how your charity puts vulnerable people at the heart of everything you do, the financial resilience services you provide (and if financial resilience support isn't your core purpose, how it fits with the wider work of your charity) and the difference your charity makes.

Please upload your A4 page.

\* Please submit a copy of your most recent **signed** Annual Accounts as submitted to and checked by OSCR. (This document must match your latest accounts as showing on OSCR). We cannot proceed with your application if you do not send in the correct accounts.

Please upload your accounts.

\* Please submit a copy of your most recent Constitution.

Please upload your constitution.

\* I understand that Bank of Scotland Foundation will not be able to proceed with this application if the correct documentation is not supplied.

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### 4. Declaration

I confirm that to the best of my knowledge, all answers on this form are correct, the application has the support of the management of the charity and the charity meets our programme guidelines.

☐

Date