



**CABWI**  
AWARDING BODY

**Supporting lifelong learning and  
development fund.**

# **APPLICATION GUIDELINES**

**September 2021**

Managed by

**Jay Charity Consultancy Services**

**Helping you make a real difference**

[www.jayconsultancy.org.uk](http://www.jayconsultancy.org.uk)

# APPLICATION GUIDELINES

## Introduction

Please ensure you have read our complete Funding Guidelines before starting your application.

## Application process

### Your prospects of success?

As you will have seen our funding guidelines are quite wide and open, so we do expect to receive many more applications than we can fund. Therefore, we have a two-stage application process. Putting together a full application is time consuming and demanding, so our first stage is a brief proposal and a form asking for details of your organisation.

If you get through to the second stage obviously your chance of success will be greater, but still not guaranteed. Some applications will drop out before they reach the Board of CABWI for decisions and not all applications discussed by the Grant Committee and Board will get a grant.

### 1<sup>st</sup> Stage Application

#### What we ask for.

1. Complete the online application form.  
This asks for basic information about your organisation. Contact details, address, etc.
2. Submit a brief introduction to your organisation  
We ask you to tell us something about your organisation
3. Submit brief answers to a set of questions.  
These ask about the work you do, what you are trying to achieve, the challenges your community faces, a brief outline of what you would like from the funding
4. Submit your annual accounts  
These should be your last audited or approved accounts. If your organisation is too new to have accounts, then send us your latest bank statement instead.

Your 1<sup>st</sup> stage application will be reviewed and will filter out any which are ineligible under our guidelines. Then we review your application in more detail and the Grant Committee review them and decide which applications to take forward to stage 2.

As funding has a limit, there may be several excellent applications that cannot be taken beyond first stage. We try to balance our funding across the UK.

# A reminder of what's available?

## Grant size

Grants of up to £30,000 a year will be available for up to two or three years. You may only apply for a **maximum of 15% of your last year's turnover**. For example, a turnover of £125,000 15% would mean applying for £18,750.

Funds for years 2 and 3 would be dependent on satisfactory monitoring reports being received and availability of funds. Not all applicants will receive the full 2- or 3-year funding.

You could apply for additional funding in the second or third year, for example for a new piece of work, but your total funding, from both grants, would be limited to a total of 15% of your turnover.

## Funding Aims

To promote lifelong learning and development that enables people to enter the labour market or gain additional skills to further develop their career.

## Fund Themes

1. To work directly with young people (aged 14-24) who are either not in employment, education, or training (NEET), or with young people who are at risk of becoming NEET, to improve their access to employment and the labour market.
2. To reach and work with individuals with complex barriers to employment, enabling them to move closer or into employment, including but not restricted to ex-service personnel and ex-offenders.
3. Increase the life skills of people so that they may further develop their careers, with a particular focus on the water, utilities, and construction industries

## Funding Priorities

1. Support to reach and work with individuals with complex barriers to employment gain relevant qualifications to enter the water, utilities, and construction industries workforce.  
*Please Note: Relevant CABWI qualifications could be provided free of charge.*
2. Support to reach and work with ex-service personnel and ex-offenders
3. Projects that have clear and well-established connections to employers who can offer meaningful work experience and/or employment.

## What will we fund?

As a funder we know that it is important to contribute to the strength and health of an organisation, particularly as we come out of the current COVID situation. By covering the core costs of running an organisation we look to enable an organisation to be as flexible and adaptable as possible to meet the demands of their beneficiaries. As a funder we look to be flexible in our approach and are happy to fund both project and/or core costs.

If you are asking only for core costs, we will want to know how your work meets our themes and priorities, what are the outcomes you look to achieve for your beneficiaries, if you have a theory of change model how does it meet our funding requirements. We will also want to know how you will monitor and evaluate your work during the lifetime of the grant.

If you are applying for both project and core costs, you will need to explain to us why this will help your organisation. For example, you could be trying a new approach and need support to fund the new project costs. We would be looking to a mix of 50/50 in the grant request towards project/core costs.

If you are applying for only project costs, we would consider full cost recovery model for your back-room costs.

## Timeline

Date	Action
Monday 6 <sup>th</sup> September 2021	Fund open for Stage 1 applications
6pm Friday 15 <sup>th</sup> October 2021	Fund closes
1 <sup>st</sup> November 2021	Grant Committee decisions communicated to applicants
November – December 2021	Assessment and development of full application. Full due diligence carried out
Week commencing 13 <sup>th</sup> December 2021	Grant Committee agrees recommendations for funding to go to the Trustee Board
January 2022	Board agrees applications for funding
February 2022	Funding agreements sent Discussion and agreement on outputs, outcomes, and milestones
April 2022	Funding Commences
September 2022	6-month monitoring report and discussion on progress

# 1<sup>st</sup> Stage application.

## Online form

The online form is straightforward and asks basic information about your organisation. Here are the questions asked on the form:

1. Name your organisation is normally known by  
This could be a working name, trading name or the name you use on your organisation's website or letterhead.
2. Legal name of organisation (if different from above)  
This should be the name on your governing documents, accounts, or registration certificate
3. Have you applied to the CABWI fund before?
4. Main office or registered address for your organisation
5. Post Code
6. Telephone Number
7. Website
8. Charity number (if you have one)
9. Company number (if you have one)
10. When was your organisation started?  
Format (M/D/YYYY)
11. Which geographic region(s) does your organisation cover?
  - a. National/Multi regional
  - b. East Midlands
  - c. Eastern
  - d. London
  - e. North East
  - f. North West
  - g. Northern Ireland
  - h. Scotland
  - i. South East
  - j. South West
  - k. Wales
  - l. West Midlands
  - m. Yorkshire and The Humber
12. Which specific locations do you work in?  
Please tell us the main locations you work in (e.g. local authority, towns, regions where most of your beneficiaries come from.
13. How many full time paid staff do you employ?
14. How many part time paid staff do you employ?

15. How many volunteers do you have (excluding any management committee or Trustees)?
16. Please provide details of your management committee, Trustee Board that governs your organisation.
17. How often do your Trustees meet?

### **Financial Information**

18. From your most recent accounts tell us the year end the accounts cover.  
Format M/D/YYYY
19. What was your income in that year?
20. What was your expenditure in that year?
21. What is the level of your free reserves?  
By free reserves we mean the unrestricted funds you hold. Funding that is not committed, restricted, or designated or tied up in fixed assets.
22. How many people have to authorise payments on your bank account(s)

### **Your Details**

23. Title
24. First Name
25. Last Name
26. Email Address
27. Confirm Email address
28. Role/position at organisation?
29. Correspondence address (if different from organisation address)
30. Alternative phone number
31. Introductory letter  
Submitted or to follow
32. Answers to questions  
Submitted or to follow
33. Accounts
34. Submitted or to follow

### **Declaration**

35. Do you have the following policies in place?
  - a. Equality opportunities
  - b. Vulnerable adult or Child protection policies as necessary
  - c. Sustainability policy
  - d. Health and safety policy
36. Confirm you have the authority to apply for funding on behalf of the organisation.

You can access the application form and guidance notes via this [link](#).

# Supporting documents

1. A brief introduction to your organisation
  - Set the scene for us.
  - We ask you to tell us something about your organisation, who set it up, what you do. You can also tell us about your reserves, or anything else you think would be good for us to know, see the funding guidelines.
  - We want to find out about you as an organisation.
  - This should be no more than 2 sides of A4

2. Brief answers to a set of questions.

Your answers should be as brief as possible, we're looking for honest answers, openness, and a clear sense of the work you do, what you want us to help with.

Your answers should be no more the 2 sides of A4.

Use the questions as heading for your response.

**a. Please tell us about the work you do?**

Tell us about the full range of the work you do. Who do you work with in terms of partners, networks etc. This is especially important is you are asking for core funding.

**b. What changes are you working towards with the community you support?**

By community we don't just mean people in a location it could be the group of people you work with, for example they have a shared need, identity, or experience. What difference does your work do. These are the outcomes, the difference you try to achieve for them.

**c. Tell us a bit more about the community and the challenges they face?**

You could give us research information, statistics, but make sure you include your organisations own direct knowledge or experience, we're looking for that lived in experience. Does the community help shape your work? You could include a very brief case study here.

**d. What help do you want from the funding?**

How much per year would you like? We don't need the full details at this stage just an indication of the amount. What will you do with the money? Is it for core funding, project funding? What activities etc. will you carry out.

**e. How does your work fit the theme(s) and or priorities of the fund.**

Just a brief explanation of how your work or project fits with the fund.

At the second stage we will ask you for more details as part of our conversations about your application.

### 3. Submit your annual accounts

These should be your last audited or approved accounts. If your organisation is too new to have accounts, then send us your latest bank statement instead.

Email the documents to [grants@jayconsultancy.org.uk](mailto:grants@jayconsultancy.org.uk)

**Please put your organisations name in the subject line.**

Your 1<sup>st</sup> stage application will be reviewed, and we will filter out any which are ineligible under our guidelines. Then we review your application in more detail and the Grant Committee review them and decide which applications to take forward to stage 2.

As funding has a limit, there may be several excellent applications that cannot be taken beyond first stage. We try to balance our funding across the UK.

We don't provide individual feedback on why we are not taking your application forward to Stage 2. There may not be anything wrong with your application, for example there may be a stronger application from another organisation in the same area.

## 2<sup>nd</sup> Stage Application

If your application is taken to second stage, we will get in touch and discuss next steps. We want this to be a supportive process, we will discuss what information we will need to take your application forward. It may be when talking this through some changes occur to your thinking and the final proposal that goes to the Board for discussion is different from the one you first put forward.

There are no forms to fill in, instead the assessment will consist of several conversations, via phone, Zoom or Teams. You will need to prepare a budget for the project, but we will give you guidance on what we are looking for in our discussions.

### What we will be looking to discuss with you at this stage?

As part of our discussions, we will be looking at the following area:

#### For project work

- Need
- Fit with Fund
- More details about what you want to do?
  - How many sessions
  - What does the programme look like?
- What partners are you working with?
- What onward progression routes do you have?
- What connections with local employers do you have?
- What qualifications, if any, will the participants achieve?
- Budget
  - More detailed breakdown
- Staffing and volunteers
  - What experience do they have?



- Who will be managing the project?
- Monitoring and evaluation plans

### **For Core funding**

- How does your work fit with the themes and/or priorities?
- How do you propose to monitor and evaluate the work?

### **Supporting Documents**

We will want to see the documents listed on the form:

- Equal opportunities policy and procedures
- Vulnerable Adult and or Child Protection policy and procedures
- Sustainability policy and action plan
- Health and safety policy.

We will produce a report on your application for the Grant Committee to review and for them to make recommendations to the CABWI Board.

Once your application has been discussed, we will write to you with the Trustees' decision and provide any feedback if you are unsuccessful.

## **Deadline for applications.**

Your completed application, including all your supporting documents, listed above, must be received by **6pm (18:00hrs) on Friday 15<sup>th</sup> October 2021.**

## **Any questions**

If you have any questions, drop us an email and we will get back to you as soon as we can. We'll add any FAQs to the website.

Please email [grants@jayconsultancy.org.uk](mailto:grants@jayconsultancy.org.uk)



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