

Richard Cloudesley's Charity

A charity endowed by the Will of Richard Cloudesley on 13th January 1518 serving churches and health and welfare needs in the ancient Parish of Islington. Richard Cloudesley Trustee Limited Co. Reg. No. 7425897
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Church Grants – Application Process

Frequently Asked Questions (Revised August 2012)

Introduction

Richard Cloudesley's Charity is setting out a number of points which churches might find helpful when completing an application to the Charity for a grant.

The Trustees feel that due to developing charity law and good practice, and the importance given to 'public benefit', changes were needed to the procedures operated in 2010 and earlier. The Trustees have decided that the process should be one which:

- Requires applicants to indicate how much they are requesting as a grant and the purposes to which that money is put;
- Provides a range of other information in a form which is understandable to trustees and consistent (with other applicants) so that they can assess that any grant would be within the terms of the Charity's governing Scheme and the principles the Trustees have agreed for these grants and which enables allocation to be made in accordance with criteria which they have developed; and
- Gives feedback after the grants have been expended so that the Trustees can see that the terms on which the grants were applied for and made have been observed and that the churches have assessed, and the Trustees can review, the value to the church and the public of what has been done.

It is important that the incumbent of the parish and any others who are involved with preparing an application for a grant has, before the application is submitted to the Charity, read the Guidelines applicable to that round, has considered the information required in the application form and has thought about what is said in these FAQs. Some changes were made in March to some information, mostly in Qs 11, 14, 17 and 23, and this time we have added Q18. Please read these particularly carefully if they apply to the application you wish to make. If having done that there are queries about any aspect of the procedure please contact the Charity.

Questions and answers

Q1: Is it works on only worship space which can be funded?

A: Works on fabric must be to "the church" in order to come within the definition in the Charity's governing Scheme. Other types of works which involve the worship space and contiguous parish rooms or halls can be funded. Works involving a standalone church hall or a clergy flat are not covered.

Q2: The form now seems very 'project' oriented. Is this a real change of policy?

A: It is accepted that the principles which the Trustees have adopted, mentioned in the introduction, are now rather more specific in what is required. What is being done is to seek information on what the Trustees need to decide on the grants and to be more open and consistent in the application and decision making process. It is easier to describe this in terms of, and to make an application for, hard 'bricks and mortar' type projects.

However the trustees will consider applications to fund all sorts of activities within the framework set out in the Charity's governing Scheme. What is necessary is that the activities are clearly defined and it is clear how these fit within the principles set out. It is also necessary to show clearly that the Charity's funding will be used to secure substantial benefit and who the beneficiaries will be.

Q3: Does it make any difference if we are able to demonstrate that we have secured some other funding for the works?

A: The pressure on the Charity's funds is considerable. As mentioned elsewhere we are unlikely to cover the full cost of work. Thus showing that there is funding from other sources, including the church's own reserves, will assist your case because it will help us see that the works are more likely to be carried out in 6-8 months from the date of the grant which is one of the things we are looking to achieve. Evidence of external support may also amount to a 'reference' for what is proposed.

Q4: What is the likely typical grant?

A: In recent six-monthly grant rounds the range of grants has been £3,000 to £20,000. The average has been around £9,000 per six monthly round.

Q5: In London a church will only be open if there is staff or volunteers who can supervise. Does this not prejudice smaller churches?

A: The importance of this question rather depends on the overall nature of the application. Churches provide a quiet, safe space for people who need it. The trustees recognise the need for supervision and this will be taken into account and credit is given if ways are found to do this.

Q6: We are planning a major redevelopment programme and would like to know whether we might expect support for this. How should we proceed?

A: The Charity would like to be consulted as your plans develop.

Q7: Even for smaller works are you willing to meet the full cost?

A: It is unlikely that we will be willing to meet the full costs of any works or activity. We feel that it is important that any applicant church demonstrates the value and priority given to what is proposed by applying some of its own funds. Also for larger projects we would expect that wherever practicable other sources of funding have been considered and hopefully used to the extent practicable.

Q8: The application mentions people who benefit. How is this considered?

A: The trustees will expect the works or activities for which funding is sought to benefit a reasonable number of people. A calculation should be made of those who will benefit directly. If necessary indicate in a note how this has been calculated and any other factors which you think are relevant. As most of the information seems to be on a weekly or monthly basis, it is helpful if this data is converted to monthly averages.

Q9: Our plans for some work are not that far advanced. Will this prejudice our chances?

A: For grants made in any six-monthly round we are expecting that the church will start the work within 6-8 months of the award of the grant. If the application does not convince us that this is likely we are unlikely to make a grant. We are likely to feel that this test is not met if any formal conditions such as planning consents or faculties have not been obtained or at least applied for and that the pricing and financing of the works or activities have not reached a fairly advanced stage. On some sorts of project we may be willing to make a grant to enable preliminary feasibility studies and preparation of plans to be done.

Q10: If a church has had an emergency (e.g. a hole in the roof or a safety issue, not

covered by insurance) which it has had to deal with will Cloudesley consider supporting it notwithstanding the point about not supporting work which has already been carried out?

A: If a church is going to carry out a project it is important that it considers the funding of that work before it carries it out. In general the trustees feel that if a church has carried out work this is evidence that it considered at the time the work was carried out it could afford it. If there is a problem of the kind indicated the trustees will exceptionally consider an application for a grant sympathetically notwithstanding that the work has been done. If this arises it would be best if the church consults the Charity before actually undertaking the work.

Q11: We have arranged to have work done, which while not an emergency, was very useful. Would an application to cover it be supported?

A: Not normally. The Charity feels that if a church has had work done or has incurred the responsibility for paying for it, it has decided it can afford it. Thus the Charity is unlikely to make a grant to support it. Please see answer to Q10 above.

Q12: If there are points in the application where we feel we cannot complete the details as requested or that the form does not really let us explain the works which are planned or the benefits to be obtained what should we do?

A: You should complete the form as fully as you can. There is no objection to your adding notes but please keep these to the minimum. The trustees want you to be able to feel that you have had the opportunity to fully make your case. As far as possible do this on the form rather than in added documents.

Q13: The form requires us to send in the latest annual accounts with auditor's/examiner's reports. Is there a problem if we cannot do this, particularly in the April round? A: We expect to receive the latest full annual accounts that have been completed with the auditor's/examiner's report so that we have consistent financial information for all applicants. If we do not get these it is unlikely that any grant will be awarded. We recognise that the timing of the March/April round is difficult. As the completed accounts should be presented to the APCM before the end of April, you should be able to send us advanced drafts, approved by your PCC, and the completed and signed accounts can follow when they are ready. If you are not going to be able to do this you should contact the Charity before submitting the application.

Q14: We are part of a team parish. Are there any special requirements?

A: Each church making an application within the team parish should complete the application form in respect of that church in the ordinary way. The accounts which you will produce will be the team parish accounts although if your team also produces church accounts these should also be included. If more than one church in the team parish is applying then we need a letter from the Team Incumbent which indicates the priority for the parish as between the applications of the team churches. If there are any questions about this please contact the Charity before making the application(s).

Q15 : Should we also send any other Annual Report type document?

A: If any other AR type document contains any financial summary a copy of that section should be sent. If you feel that to show the place of the church in its community there are sections which would help the Trustees by all means send copies of those sections, in which case we would expect to see a reference to it in the form as to why it is sent and what we should draw from it. In general sending the whole AR (or any other document) without the application form stating how it adds specifically to the case is not helpful and we would prefer that it is not done.

Q16 : There will be times when even for expensive items (e.g. a new boiler or lighting) a formal estimate cannot be given. How should we proceed?

A: The trustees are keen that work which is to be supported has been properly planned and will be carried out in a timely way after the grant is made. Thus they will be looking to see that the appropriate preparation has been done including analysing the funding. However if no contractor's estimate is available other evidence, such as a report from an architect, engineer or other consultant who has recommended the works, an indication of price from price lists or an internally generated estimate will be considered. The best evidence available should be submitted.

Q17: Is there any more information about contractors to be used which you need?

A: Although the Charity has no formal rules it does expect that contractors chosen will be properly qualified and members of the appropriate bodies for consumer protection. It gives us more confidence if we can see on any estimate etc. an address, a land line telephone number and a VAT number. We also hope that churches will select contractors based in and drawing their workforce from the local area. However, the choice of contractors and ensuring that work is carried out properly is the responsibility of the church.

Q18: In preparation for the project for which we are seeking funding we have had an experts report or a feasibility study. Should we enclose such documents with the application?

A: It is important that the Charity knows what steps you have taken in the planning process. So long as the Charity knows what the steps taken were, and the advice or recommendations made, it is probably not necessary to enclose the reports. This information is useful in showing that the project is both needed and value for money.

Q19 . How should we take account of VAT?

A. We will be wanting to see that the total costs of the works has been assessed and that you have included VAT or excluded it as appropriate is clear. If nothing is indicated we will be assuming that any VAT payable is included in the figures.

Q20 . We may need either planning permission or a faculty. Does this make a difference?

A: If planning permission or a faculty is needed and has not been applied for at the time of the application this may substantially affect your ability to do the work in 6-8 months and could affect the Trustees' decision. It is important that before making an application for a grant the need for any third party consents has been properly checked out and is covered in the application form.

Q21 : We feel that we can give the answers more easily on a separate sheet. Is this all right?

A: We would much prefer that the boxes on the form are completed in the way that is suggested. If there is a need to explain why that data as sought cannot be provided or provided in the way requested a note can be added in the appropriate place. We would prefer that extra sheets or documents are used only if there is no other way of giving us the information.

Q22 : The form requires confirmation of acknowledgement in the accounts. Why is this?

A: Acknowledgement of a grant is a normal requirement of charity donors. The trustees are keen that the activity of the Charity in supporting local churches is known and understood by both the congregations of the churches and also more widely in the Islington communities. What is said about grants from the Charity in the accounts should be at least as prominent as any other body that has given a similar amount in the year in question. This is a minimum. It is hoped that churches will see that reasonable publicity is given in other ways to grants that they get from the Charity. Indeed where the funding from the Charity for a specific major project (e.g major refurbishment) has been very substantial we may well be seeking more obvious acknowledgement. We are also looking

to ensure that the grants that are available for the 'sick poor' through the Charity's other schemes are also promoted. We are keen to increase the knowledge about these in Islington.

Q23: How does the Charity like to be referred to?

A: The Charity's working name is "Richard Cloudesley's Charity" and in acknowledgements or narrative this is the name to be used.

Q24 : How do you prefer the applications submitted and if so in what form?

A: We would prefer the form to be sent in Word, as an attachment to an email. Other documents can be attached in whatever electronic format you have. The original of the signature page should be submitted by post. We recognise that there may be churches where the form of electronic submission requested above is not practicable. Thus submission of documents by post will be accepted.

Q25 : How do we ensure that the right person gets details of the application timetables and the like? A:The Charity will always communicate with the relevant incumbent and others who are recorded as the contacts for this purpose. It is important that contact details, particularly email addresses for incumbents and other contacts are kept up to date by the churches.

Q26 : The text in the guidance implies that the process is competitive.

A: Regrettably the process is competitive to an extent. The amount sought is normally significantly more than the amount available and thus there is a competitive element. The trustees need to think about how the grants made can achieve most. The guidance seeks to give some indication of what they will be looking at in making these difficult decisions. Each application will be considered on its merits but this will be done in the context of the continuing relationship between the Charity and the Islington churches.