**DUCHY OF LANCASTER BENEVOLENT FUND**

**(MERSEYSIDE)**

**APPLICATION FORMAT (Ver 16: as at 29th April 2024)**

**BACKGROUND**

1. The Duchy of Lancaster Benevolent Fund is a registered charity set up in 1993 with the consent of Queen Elizabeth II to support local good causes and community initiatives located primarily within the County Palatine. Funds from the Benevolent Fund are allocated quarterly to the Lieutenancy Office of Merseyside. All applications must demonstrate a clear benefit to the local community.

**APPLICATIONS**

2. Applications may be sent by post or e-mail.

a. **Post:**

Duchy of Lancaster Benevolent Fund

Merseyside Lieutenancy

Suite 4a 4th Floor, Exchange Station

Tithebarn Street

Liverpool L2 2QP

b. **Email:** [msl.clerk@lieutenancy.info](mailto:msl.clerk@lieutenancy.info)

**APPLICATION TIMELINES**

3. Whilst grants may be submitted any time all applicants should note that the committee

will only sit four times per year. The timetable for submissions, noting the timelines for the awards panel to sit etc. is as follows:

|  |  |  |
| --- | --- | --- |
| **Funding received** | **Applications deadline** | **Grants Committee Meeting\***  **[\*Note: A quorum will be required at the meeting i.e. at least 3 members]** |
| 1st July 2024 | 1st July 2024 | 23rd July 2024  10.00hrs to 12.00hrs  Funding activities Aug - Nov |
| 1st October 2024 | 1st October 2024 | 29th October 2024  10.00hrs to 12.00hrs  Funding for activities Dec-Feb |
| 1st January 2025 | 20th December 2024 | 21st January 2025  10.00hrs to 12.00hrs  Funding for activities Mar-May |
| 1st April 2025 | 1st April 2025 | 29th April 2025  10.00hrs to 12.00hrs  Funding for activities Jun-Aug |

**APPLICATION PROCESS**

4. **Please provide all of the information requested. Failure to complete all of the**

**boxes will result in your application being returned.**

**Name** of the person making the **Application** and the **Name and Address** of the

organisation:

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| --- |
| Applicant:  Name of the Organisation:  Applicant’s role in the Organisation:  Organisation address: |

**Telephone contact details:**

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| Applicant’s telephone number:  Organisation’s telephone number: |

**E-Mail and Website address:**

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| --- |
| Applicant’s email address:  Organisation’s email address:  Website: |

**Registered Charity Number (if applicable):**

|  |
| --- |
|  |

**Bank Account details:**

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| --- |
| Bank:  Account Name:  Sort Code:  Account Number: |

**Aim of the organisation, details of activity, number of beneficiaries, detailed costing and impact statement if unsuccessful:**

|  |
| --- |
| **Aim and objectives of the organisation – Summarise the purposes of your organisation, together with details of your geographic sphere of influence** (**max 80 words**):  **Details of activity for which the Grant is applied for** (**max 100 words**):  **Detailed costing of the activity for which the grant is applied for: (This must include a breakdown of costs, item by item.). Please attach any quotations obtained.**  **Impact Statement if Unsuccessful (max 40 words) (What will happen if you do not receive this grant?)**  **Amount Requested £:** |

**Additional details:**

|  |
| --- |
| **Details of other organisation(s) that you have applied to for a grant for this activity/event and the status of the application. Please include the amount applied for and received and how any received funds have been used.**    **(*If you have not applied to other organisations, then please specify why not*)** |

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| **When will the Grant be used (Date):** |

**Referees:**

|  |
| --- |
| Two letters of reference **must** be included with your grant application.  The referees must be independent of the organisation and should, where possible, be Merseyside residents.  The referees cannot be service providers who would benefit from receipt of the grant, i.e. we cannot accept a reference from someone who will be funded by the grant to provide you with a service.  The letter of reference should include the referee’s name, occupation, address, telephone number and email address and their relationship to your organisation.  The referee should be in a position to confirm that the grant will be spent for the purposes described and within the stated time. |

**Audited accounts:**

|  |
| --- |
| Please provide a copy of your latest audited accounts.  If your audited accounts are dated from before 2023 please **also** include a copy of your bank statement for the previous three months.  If you fall below the threshold requiring audited accounts, please **also** include a copy of your most recent bank statement.  **Please check that you have attached:**   * **your accounts,** * **three months’ bank statements if applicable,** * **two letters of reference, and** * **any relevant quotations / estimates for work.**   Signed: ……………………….  Print Name:  Date of application: |

**ADDITIONAL NOTES**

1. The maximum Grant will be £5000. The requested amount must be specific to what is needed and not an inflated figure in the hope of receiving the maximum grant.

2. If you are requesting support for a specific project for which you have received an estimate of costs, please attach a copy of the quote to this submission.

3. A successful application will come with conditions. An example is:

* *The organisation submits a Summary Report on the outcome(s) achieved as a direct result of the grant by a specified date.*
* *The organisation may be required to publicise the support of the Duchy of Lancaster Benevolent Fund (Merseyside) in its literature/advertising.*
* *Invoice(s) for good(s) forwarded to the Duchy of Lancaster Benevolent Fund.*
* *Failure to abide by / honour the above conditions may affect further grant applications.*

**Note.** On confirmation of acceptance of the conditions the grant will be released.

4. The Duchy of Lancaster Benevolent Fund Grants Committee reserve the right to visit any organisation for which a Grant is made to ensure that the monies granted have been used for its intended purpose(s).

**Restrictions**

5. **Salaries and Running Costs.** The Grants Committee will only in exceptional circumstances consider an application **for salaries and running costs.**

6. **Community Interest Company (CIC).** The Grants Committee will only in exceptional circumstances consider an application from a **CIC.**

**Note.** You should contact the Clerk to the Lieutenancy to discuss the specifics of your application in either of the above restrictions before making a formal application.

7. **Grant Application Level.** The Duchy of Lancaster Benevolent Fund (Merseyside) has a finite amountof money. Demand often outstrips supply and therefore it is important that the details of your application are succinct and that the amount requested is not inflated – ask only for what it will cost to meet the needs of the activity in the grant application.

8. In compiling your application, please ensure the following:

* Type Face: Arial
* Font Size: 12pt
* Document to be submitted in Word format

9. Guidance/advice is available from the Clerk to the Lieutenancy on 0151 363 9528 or e-mail: [msl.clerk@lieutenancy.info](mailto:msl.clerk@lieutenancy.info)