

## Transport Application Form

Before completing this form please make sure you have read our Transport grants [guidance](#).

If you have any communication support needs that make reading or completing an application form difficult or impossible, please get in touch with us at [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk) or call us on 0141 353 4321 to discuss alternative ways you can apply.

**PLEASE NOTE THIS IS A SAMPLE APPLICATION FORM - WE HAVE LINKED TO THIS FORM TO ENABLE APPLICANTS TO SEE QUESTIONS BEFORE STARTING AN APPLICATION. THE FULL APPLICATION IS LINKED TO WITHIN THE [GUIDANCE](#).**

**Does your organisation have a minimum of three unconnected trustees?**

By unconnected we mean these people should not be related; married to each other; in a long-term relationship with each other or living together at the same address.

**Yes/No**

**Please Note:**

We consider it good practice for organisations to have at least three unconnected Trustees or members on its Board or Committee. If you do not have this, we cannot consider your application.

**OSCR** and **SCVO** have some useful resources on good governance. Your local **Third Sector Interface** may also be able to provide you with some guidance around this.

**Does your work involve children, young people or vulnerable adults?**

**Yes/No**

**If yes, do you have a policy document which sets out how you will keep them safe?**

If your work involves children, young people or vulnerable adults we need to know that you have policies in place to keep them safe. We might also ask to see these.

**Please Note:**

**If your work involves children, young people or vulnerable adults we can only accept an application from you if you have a policy in place which sets out how you will keep them safe. You can find more information on safeguarding, including useful resources and guidance, on the [NSPCC](#) website.**

**Your local [Third Sector Interface](#) may also be able to provide you with some guidance around this.**

**About your Organisation**

**Organisation Name:**

Please provide the name of your charity as registered with OSCR or the Charity Commission.

**Charity Number:**

Please provide your Charity number as registered with OSCR or the Charity Commission. If you are a Scottish Charity, please enter this in the format SC012345.

**Organisation Address:**

Please provide the address your organisation is registered at.

**How many people on your board and/or senior staff share similar experiences to the community you support?**

### **Pick from one of the options below:**

- **Most people** (at least 75% of your Board/Management Committee and/or at least 50% of senior staff who report directly to your Board).
- **Around half** (50% of your Board/Management Committee and one person who reports directly to your Board).
- **A small number** (one or two people on your Board/Management Committee).
- **None**
- **I don't know**

We will not use this information for assessment purposes. We are interested in understanding the profile of the organisations we fund and will report on this figure annually as part of our Equity, Diversity, Participation and Rights (EDPR) [Commitment](#).

### **Are any of your Trustees also paid members of staff?**

By paid members of staff, we mean Trustees who are employed by your organisation and receive a salary.

**Yes/No**

**If yes, please provide details below and tell us how your organisation manages this.**

Please tell us their name(s), position within the organisation and their role on the board, e.g. Chair. Do you have a conflict of interest policy in place? Please also tell us about any plans to change your Board structure, for example if the post holder will be stepping down as a Trustee.

### **What does your organisation do and who does it support?**

Please tell us, in your own words, what your organisation does and who it supports. Are there any specific groups of people that you work with? It would be helpful if you can also give us an indication of the number of people your organisation/work has supported directly in the past 12 months. Further information on the types of work we are looking to fund through our Transport grants can be found in our [guidance](#). **300 word limit.**

## **How do you involve the people you support in the development and delivery of your work?**

Examples of this might include: having regular chats with the people you support, in person or on social media, to gain their views; using surveys to gather feedback and taking action on this; including those you support on your Board, on steering groups or as volunteers. We are also interested to know how you involve people from diverse communities (for example disabled people or people experiencing racial inequity) and remove barriers to their participation. **300 word limit.**

## **Please tell us about the vehicle or transport costs you are asking us to support and how these will help you deliver your services/activities?**

Tell us what, specifically you will deliver and how this will support people or communities with higher rates or higher risk of poverty and trauma. Please also refer to our [funding themes](#), if your work is specifically addressing one of these. For example:

This work will address the Financial Security funding theme, as it will ensure people who are struggling with their day-to-day costs have access to healthy and affordable food through our food pantry, or:

We are working in a community with high levels of poverty and will provide low-cost transport for local people, to ensure they can access essential services, employment and social opportunities. We will also provide discounted hire of our vehicle to other local charities and community groups.

You can find more information about our funding themes and what we look for in an application in our Transport grants [guidance](#). **300 word limit.**

**If the services/activities described above will be delivered in any local authority area(s) outwith where your Organisation is based, or across multiple authority areas, please select all that apply from the list below, up to a maximum of 6. If more than 6, please select Scotland Wide:**

Scotland Wide

Aberdeen City

Aberdeenshire

Angus

Argyll & Bute

Clackmannanshire

Dumfries & Galloway

Dundee City

East Ayrshire

East Dunbartonshire

East Lothian

East Renfrewshire

Edinburgh City

Falkirk

Fife

Glasgow City

Highland

Inverclyde

Midlothian

Moray

North Ayrshire

North Lanarkshire

Orkney Islands

Perth & Kinross

Renfrewshire

Scottish Borders

Shetland Islands

South Ayrshire

South Lanarkshire

Stirling

West Dunbartonshire

Western Isles

West Lothian

**Please tell us whether you have considered shared vehicle usage or other sustainable transport options as part of your plans.**

As a signatory to the ACF [Funder Commitment on Climate Change](#), we are committed to playing our part in addressing the causes of climate change and supporting adaptation to its effects. We are therefore particularly interested in funding sustainable transport options through this Fund. This could be, for example, the costs of an electric vehicle; a vehicle which would be shared a number of local groups; or active travel, such as using bikes and e-bikes. Please tell us whether you have considered options such as these. We understand that there may be barriers to adopting more sustainable modes of transport and are interested to learn about these. Please tell us about any barriers you have faced in relation to the vehicle/costs detailed in this application, for example, you may have opted to apply for the costs of a petrol rather than an electric vehicle due to a lack of charging infrastructure in your area. **300 word limit.**

**What outcomes/differences do you hope your work will contribute to making for the people you support?**

We want our funding to help reduce and prevent poverty and trauma in Scotland. To help us achieve this, we need to understand what differences our funding is helping to make for individuals, families and/or communities. These differences are sometimes called outcomes or impact. By knowing what differences you hope to achieve through your work, it will help us to see how your proposed work aligns to our own strategy. Here are some examples of how you might talk about outcomes/differences:

- We want to ensure that local people who are struggling with the cost of living can easily access food that is nutritious and affordable. We also want to reduce food

waste through our partnership with local supermarkets distributing surplus food.

- We want to ensure that transport is not a barrier for people in our community. Our service will ensure that they have access to essential services to meet their needs, that they can travel to work, and that they can take part in social activities, to feel part of their community, without having to worry about the costs. **300 word limit.**

### **How will you know if you are making those differences?**

Please tell us what monitoring and evaluation plans you have in place which will help you to understand what differences your work is contributing to for individuals, families, and/ or communities, and what is leading to those differences. The information you gather should include a mixture of numbers and stories and might involve carrying out surveys, interviews, observations, or any other way that you think will show what differences your work has helped to make. If your application is successful, we will ask you to include this information in your End of Year and End of Grant reports.

We also hope that you will use the information you gather to make continuous improvements to your work and ensure you are having the biggest impact that you can. **300 word limit.**

### **How many years of funding are you requesting?**

**Please select: 1, 2 or 3**

Our Transport grants are for 1-3 years. If successful, your funding will run for 12 months from the date we pay your award. In most cases this will be different to the dates of your financial year.

**Please provide a fully costed budget for this work, using our [budget template](#).**

Please try to include all the associated costs of your planned work and not just those you are requesting from us. You should group expenditure under summary headings, e.g. vehicle purchase, travel costs, volunteer expenses etc. If you are applying for:

Please include all costs associated with your request. If you are applying for:

- **a one-off contribution towards the costs of purchasing a vehicle**, please present the total cost of the vehicle in the year one column. You can also include any associated costs you'd like us to consider e.g. a contribution towards fuel.

- **a multi-year award towards the costs of leasing a vehicle**, please present the total annual lease cost in the year 1-3 columns. You can also include any associated costs you'd like us to consider e.g. a contribution towards fuel.

- **a multi-year award towards the costs of a transport project** e.g. the purchase of bikes as well as training and volunteer costs. Please include any upfront purchase costs in year 1, plus any associated costs in years 1-3.

- **a multi-year award towards the running costs of your organisation** (if your sole focus is transport provision). Please present a full organisational budget, detailing your organisation's overall costs in the year 1-3 columns.

- **salary costs**, please provide details of each salaried post individually and include NI and employer contributions in the total salary cost for each. For sessional staff, please provide the total cost of this under one summary heading.

You can also include a proportion of your day to day running (core) costs for salary or project specific requests and should list this as a separate item of expenditure.

If you expect costs to increase year on year, e.g. due to salary increments or inflation, please show this in your budget.

**How much would you like from us in total?**



Please confirm the total amount of funding you would like from us for the full funding period requested. Please note this should be based on a minimum of £5,500 and a maximum of £20,000 per year. Please provide this to the nearest thousand and please enter only numbers. For example, if you are requesting £10,000 per year for three years please enter 30000.

## **Organisation Contact**

This contact must be a Trustee, and someone who is authorised to apply on behalf of the organisation. Their details will be used as a contact point for all automated emails from The Robertson Trust, including confirming receipt of the application and our final funding decision.

**First Name**

**Last Name**

**Position**

**Telephone**

**Email**

The organisational contact has given consent for their details to be used within the application and associated processes.

Yes

**Does this contact have any communication support needs?**

**Yes/No**

**If yes, please tell us how we can support you during the assessment of your application.**

## **Application Contact**

This is the person we will contact with any queries about the application and who we expect to be the main point of contact throughout the assessment process. If there is a chance that they might not be available for an extended period during the 8-10 week assessment

timeframe, you may wish to consider nominating another person.

Their details will be used as a contact point for all automated emails from The Robertson Trust, including confirming receipt of the application and our final funding decision.

This contact **MUST** be a different person to the Organisation contact noted previously.

**The application contact provided must be different to the organisation contact above.**

**The emails provided on this form must be different.**

**Forename**

**Surname**

**Position**

**Telephone**

**Email**

**Does this contact have any communication support needs?**

**Yes/No**

**If yes, please tell us how we can support you during the assessment of your application.**

**Do you have independently examined or audited Annual Accounts?**

**Yes/No**

If yes, please upload your annual accounts with your application form. If your accounts are more than 12 months old, please also provide a copy of your recent management accounts in the additional documents section below.

If you are a **newly registered Charity** and haven't yet produced Annual Accounts we can still consider your application and will ask you to provide details of an independent referee and a recent copy bank statement dated within 3 months. Please also send us a projection showing your organisation's expected income for its first year.

**Please upload a copy bank statement for your organisation which is dated within the last 3 months.**

### **Independent Referee**

Please provide details of an Independent Referee below.

This is someone who knows the work of your organisation but is not directly connected to it. This might be a local community worker, MSP or Councillor, teacher, health professional or someone from your local Third Sector Interface.

Having someone from your community vouch for your work lets us know that you are well linked in within your local community and are known to others.

*We may contact the independent referee as part of the assessment of your application or during the period of any funding we award. Please make sure you have permission to provide their details and that they are happy for us to contact them. We will store their details until any grant we award comes to an end.*

**Forename**

**Surname**

**Organisation**

**Position within the organisation**

**Email**

**Telephone**

## **Supporting Documents**

**Please also attach any other documentation relevant to your application, for example a job description if you are asking for funding towards a specific post, management accounts or, if you are a newly registered charity, a projection showing your organisation's expected income for its first year**

**If you are having trouble uploading files, or need to send us additional documents, you can email them to us at [onlineapplications@therobertsontrust.org.uk](mailto:onlineapplications@therobertsontrust.org.uk).**

**Please tell us your organisation's name and provide your application reference number, if you have one. If you are unable to send us this form as a result of issues uploading files, please call us on 0141 353 4321.**

**Is there anything else you want to tell us about this application or any attachments you are providing which has not been covered previously? 300 word limit.**

**If this is your first application to the Robertson Trust, how did you hear about us?**

Funding Event\*

The Robertson Trust Making an Application Workshop

The Robertson Trust Website

Word of Mouth

Local Authority Funding Officer

Third Sector Interface\*\*

Media

Other

Don't Know

\* This could be a local authority funding fayre, Robertson Trust event or another funders' event

\*\* Third Sector Interfaces (TSIs) provide a single point of access for support and advice for the third sector within local areas. There is a TSI in each local authority area in Scotland.

## **Grant Terms and Conditions**

By making an application to the Robertson Trust, you acknowledge that you are authorised to apply on behalf of your organisation and agree to the following terms and conditions:

### **Use of data:**

1. Your organisation unconditionally authorises The Robertson Trust to:

- a. Retain, store and use the information you give us in your application and future reporting for administration, analysis, research and promotional purposes;
- b. Publish details of any financial or non-financial support given to your organisation;
- c. Pass any details obtained about your organisation through this application or through subsequent assessment procedures to external agencies, including other grant-making bodies;
- d. Use such information as part of any survey undertaken by The Robertson Trust and/or use any such details as part of any press release or publication without the need at any time to obtain the further consent or agreement from your organisation.

### **Use of funds:**

2. If awarded funding, the grant will be spent on only the purposes approved by The Robertson Trust, and only by the organisation to which we awarded funding;

3. Where the grant is unrestricted, this money can be used towards any of the day to day operational costs of the organisation;
4. The grant will not be paid until you have provided your bank details, a copy of a bank statement/letter no older than three months and you have met any other specific conditions of release, as detailed in your Grant Welcome Pack.
5. The grant period commences upon release of the first payment. Each grant year runs for a period of 12 months from the date of release.
6. Any (annual) installment of the grant must be used within 12 months of release.
7. You will send us a progress report if documented/requested in your Grant Welcome Pack.
8. We reserve the right to contact and/or visit you to see the funded work during the life of the grant.
9. You will inform us, in advance where possible, of any significant change to the funded work, proposal or your organisation throughout the grant period (even if you have not yet drawn down the grant). A 'significant change' includes:
  - a. a consequential change to your grant's expenditure;
  - b. any changes in postholder or to their role/hours/salary costs;
  - c. any change in your organisation's legal status or constitution;
  - d. any significant operational changes within the organisation that are likely to affect the funded work;
  - e. any serious financial or governance issue facing your organisation;
  - f. any safeguarding concern raised about your organisation, its staff or volunteers;
  - g. any underspend of our award.
10. If you are not sure whether you need to let us know about an issue or change within your organisation or the funded work, please contact your Funding Officer or email [funding@therobertsontrust.org.uk](mailto:funding@therobertsontrust.org.uk).

11. You will inform us of any concerns regarding your organisation raised with OSCR (Scotland) or the Charity Commission (England) during the lifetime of our grant. A list of concerns which OSCR can investigate are listed [here](#).
12. Any underspend of our grant must be declared to us and may be refunded/repaid to the Robertson Trust.
13. We reserve the right to withhold a grant or require repayment if:
14. You have deliberately falsified information as part of your application or reporting;
  - The work undertaken is not the work for which the funding was approved and where we have not approved these changes;
  - Your organisation becomes insolvent or goes into administration, receivership or liquidation and the funding has not been spent on its intended purpose.

We will sometimes apply additional conditions to an individual grant, but these will be included in your Grant Welcome Pack.

Where the application and grant award are made electronically, the agreement between us shall be deemed to be in writing and your online acceptance of these Terms and Conditions shall be deemed to be a signature to that agreement.

**You are authorised by your organisation to make this application and accept the Terms and Conditions set out above on its behalf.**

I Agree

**To the best of your knowledge, all the information you have provided in your application gives a true and accurate account of your organisation's work and needs.**

I Agree

**We may, very occasionally, wish to share relevant updates and learning with the organisations we fund. Please let us know, using the check boxes below, whether you are happy to receive this information. Please note you do not have to give your consent in order to apply. The Robertson Trust is relying on your consent in order to share this information with you. You can unsubscribe at any time by emailing us at [dataprotection@therobertsontrust.org.uk](mailto:dataprotection@therobertsontrust.org.uk)**

I Agree/I do not Agree

Once you have completed the form and are ready to send it to us, click the 'send' button below. You will then be shown a preview of your completed form, which you can review to ensure you are happy with your responses. You can also print a copy of the form by clicking the 'print this page' button at the bottom of the next page.

When we receive your application, we will email you a link to an **online copy** of your completed form. If you require a paper copy application for your records, you should print a copy of this now.

Once you are happy with your responses and have printed a copy of the form, if required, hit 'confirm' to send us the application form.