

DUCHY OF LANCASTER BENEVOLENT FUND (MERSEYSIDE)

APPLICATION FORMAT (as at 1 May 17)

1. Applications may be sent by post or e-mail.
 - a. **Post:**

Lieutenant Colonel JJV McEvoy BEM
Duchy of Lancaster Benevolent Fund
Merseyside Lieutenancy
PO Box 144, RSA
The Capital Building
Old Hall Street
Liverpool
L69 3EN
 - b. **e-mail:** MSL.clerk@gmail.com
2. The following information is required (see Pages 4 and 5 for Sample Layout):
 - a. **Name** of the person making the **Application** and the **Name and Address** of the organisation
 - b. Telephone contact details of the Applicant and the Organisation
 - c. E-mail address of the Applicant and the Organisation
 - d. Registered Charity Number (if applicable)
 - e. Bank Account details (e-banking payment).
 - f. Name of Bank Account
 - g. Aim and objectives of the organisation.
 - h. Summary of the activity for which the grant is required and, numbers of beneficiaries. Please state the impact of not being successful in your Application.
 - i. Amount requested.
 - j. Details of other organisation(s) that you have applied to for a grant for this activity/event and the status of the Application.
 - k. When the grant will be used (Minor Grants must be used within two months of receipt and Major Grants within six months of receipt). However see note 1 below.
 - l. Names and addresses of two referees who can verify that the application will be used for its intended purpose(s) and who will be in a position to confirm that

¹ When a Grant cannot be spent within the specified period, this must be explained in the Application.

the grant has been spent within the stated time. Referees must be independent of the organisation.

3. When submitting an Application the following supporting documentation is required:

- a. **Registered Charity:** Statement of Financial Activities
- b. **Other Organisations.** As above

4. **Additional Notes:**

- a. The maximum Grant will be £5000.
- b. The maximum period of support will normally be 2 years.
- c. Whereby two consecutive successful Applications are achieved, a 3 year debar may be applied before a further Application can be made.
- d. In the case of one successful Application in a two year period a two year debar may be applied before a further Application can be made.
- e. A condition of accepting a Grant is that the Applicant must within four months (Minor Grants) and, within eight months (Major Grants), submits a Summary Report on the outcome(s) of the activity for which, the Grant was made.
- f. The Duchy of Lancaster Benevolent Fund Committee reserve the right to visit any organisation for which a Grant is made in order to ensure that the monies granted have been used for its intended purpose(s).

5. **Application Timelines.** These are:

a. **Minor Grants (> £1K)**

Submit By	For Consideration	Applicant Informed	Notes
1 Mar	Apr	May	1. The Grant must be used for its intended purpose no longer than two calendar months after receipt
1 May	Jun	Jul	
1 Jul	Aug	Sep	
1 Sep	Oct	Nov	2. A Summary Report for which the Grant was made is to be forwarded to the Merseyside Lieutenancy within four calendar months of receipt of the Grant.
1 Nov	Dec	Jan	
1 Jan	Feb	Mar	

b. **Major Grants (£1K > £5K)**

Submit By	For Consideration	Applicant Informed	Notes
1 Jan	Mar	Apr	1. The Grant must be used for its intended purpose no longer than six calendar months after receipt
1 Aug	Sep	Oct	
			2. A Summary Report for which the Grant was made is to be forwarded to the Merseyside Lieutenancy within eight months of receipt of the Grant.

6. **Summary.**

a. The Duchy of Lancaster Benevolent Fund (Merseyside) has a finite amount of money. Demand often outstrips supply and therefore it is important that:

(1) The detail in paragraph 2 is specific, measurable, accurate, and realistic.

(2) The service(s)/requirements are time-related (i.e. they can be delivered within a given period).

b. Guidance/advice is available from the Clerk to the Lieutenancy on 07590 768280 or e-mail: MSL.clerk@gmail.com

Please see Sample Layout on next page

DUCHY OF LANCASTER BENEVOLENT FUND APPLICATION

SAMPLE LAYOUT

Explanations can be in Bullet Point form

1. Name of person making the Application and Name and Address of Organisation:
2. Telephone contact number:
 - a. Landline:
 - b. Mobile:
3. e-mail address and website (if applicable):
4. Registered Charity Number/Companies House Registered Number (Company Title)
5. Bank Account Details:
 - a. Sort Code:
 - b. Account No:
 - c. Branch Address:
6. Cheque payable to: (must be as stated on the Bank Account details)
7. Aim of the Organisation: (e.g. to provide support to XXX)
Objectives:
 - a. (e.g. to ensure that those in need receive: XXX)
 - b. (e.g. to provide activities to: XXX during XXX)
8. Summary of Activity:
 - a. the Grant will be used to provide XXX to children/families who are XXX
 - b. The impact of not receiving the Grant will be XXX
9. Amount requested (this can be a precise amount or stated as a Donation towards)
10. The following organisations have been approached to support this activity: (State the progress of your application to each).
 - a. e.g XXX – still being considered
 - b. e.g. XXX – Grant of XXX has been approved

11. Grant will be expended on activity:

a. By XXX (date). or:

b. The Grant will be expended over the following period XXX (date) due to XXX because:

12. Names, addresses and contact telephone numbers of two Referees (must not be employees/volunteers of the organisation):