

DUCHY OF LANCASTER BENEVOLENT FUND (MERSEYSIDE)

APPLICATION FORMAT (as at 28 Jan 19)

1. 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. **e-mail:** msl.clerk@lieutenancy.info
2. The following information is required (see Annex A 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 of the organisation – brief description.
 - h. Detail of the activity for which the grant is applied to include:
 - (1) The number of beneficiaries of the activity
 - (2) Detailed costing of the activity for which the grant is applied for
 - (3) Impact statement if unsuccessful
 - 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. If you have not applied to other organisations, then please specify why not.
 - k. When the grant will be used (Minor Grants must be used within three months of receipt and Major Grants within six months of receipt). However, see note 1 below.

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

I. 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 the grant has been spent within the stated time. Referees must be independent of the organisation. In addition, Referees must be where possible, resident in Merseyside

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

- a. **Registered Charity:** Current Financial Statements (Full Audit Report **is not** required)
- 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. 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.
- d. The Duchy of Lancaster Benevolent Fund Grants 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).** These may be submitted at anytime
- b. **Major Grants (£1K > £5K)**

Submit By	For Consideration	Applicant Informed	Notes
1 Feb	Apr	Apr	1. The Grant must be used for its intended purpose no longer than six calendar months after receipt
1 Aug	Oct	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 the detail in paragraph 2g – h is accurate.
- b. Guidance/advice is available from the Clerk to the Lieutenancy on 0151 363 9528 or e-mail: msl.clerk@lieutenancy.info

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)
Detail of the activity for which the grant is applied to include:
 - (1) The number of beneficiaries of the activity are XXX
 - (2) Detailed costing which the grant is applied is XXX and this is broken down as follows:
 - (a) Materials XX
 - (b) Transport XX
 - (c) Etc. XX
 - (3) Impact statement if unsuccessful
8. Amount requested (this can be a precise amount or stated as a Donation towards)

9. 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

Note. If no request(s) has / have been made to other organisations in support of this activity, please state 'why not'.

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

11. **Referees:**

- a. Names, addresses and contact telephone numbers of two Referees
- b. Referees need to be aware of their obligation as a Referee i.e. confirm integrity of the organisation and that the grant is used for its specified purpose
- c. Referees need to be local to the organisation in Merseyside

Please note that Referees must be independent of the organisation