

INVEST STAGE 1 GRANT APPLICATION

Your charity details and funding request

Note: Please read the [Invest Stage 1 Guidance Notes](#) before completing the form.

Data Privacy Notice

This information is being collected by Lloyds Bank Foundation for England and Wales.

Your lead contact's name, job title and contact details will be used to support the grant assessment process, to notify your organisation of the outcome of your grant application and, if successful in securing funding, to manage and monitor the grant. Your data will be used only for the purposes specified. Your data will be held on our database and will be kept for a period of 7 years. Under the General Data Protection Regulations, you have the right:

- of access to your personal data - if anything is inaccurate or incorrect, please let us know and we will correct it;
- to have your data expunged from our database.

For **further information** (including details on how to request a copy of your information) or to make a **complaint** about our use of your data, please contact the Head of Service Delivery at enquiries@lloydsbankfoundation.org.uk

Charity Details	
Registered Charity Number	Please enter your registered charity/CIO number
Charity Name	Legal name of your charity
Charity Address	
City	
Postcode	
Phone	
Email Address	

Website
Twitter
Information About Your Charity
<p>We fund small and local charities helping people – predominantly adults – overcome complex social issues.</p> <p>Generally, we expect most people to be over 17, but we also fund charities that work with people aged UNDER 17 years that are young parents leaving the care of a Local Authority or young people moving into independent living.</p>
What is the main complex social issue your charity addresses?
<ul style="list-style-type: none"> • Domestic abuse • Sexual abuse and exploitation • Mental health • Homelessness/ vulnerably housed • Offending, prison or community service • Care leavers • Learning disability • Addiction and dependency on alcohol, drugs, substances and/or gambling • Trafficking and modern slavery • Young parents • Asylum seekers and refugees
What are the other complex social issues your charity addresses? You can select up to two further issues.
<ul style="list-style-type: none"> • Domestic abuse • Sexual abuse and exploitation • Mental health • Homelessness/ vulnerably housed • Offending, prison or community service • Care leavers • Learning disability • Addiction and dependency on alcohol, drugs, substances and/or gambling • Trafficking and modern slavery • Young parents

<ul style="list-style-type: none"> Asylum seekers and refugees 	
Please provide a brief history and background for your charity	
What are your charity's main activities?	
How many trustees do you currently have?	
How many times have they met in the last 12 months?	
How many paid staff does your charity have?	
Full Time	Part Time
How many active volunteers do you currently support?	
Please indicate which of the following organisational policies and practices are currently in place. We may ask you to provide copies if your enquiry progresses to full assessment.	
Equal Opportunities	
Health and Safety	
Yes	
Disciplinary Policy	
Yes	
Vulnerable Adults / Safeguarding	
Yes	
DBS Checks for Staff and Volunteers	
Yes	
Appropriate Insurance	
Yes	
Fire Regulation Procedure	
Yes	
General Data Protection Regulation (GDPR)	
Please list any quality marks or standards the charity currently holds - eg: PQASSO, IIP, ISO 9001, OFSTED/CQC regulated, AQS etc	

Your Finances – Income and Expenditure		
Last Year Income		
Expenditure	Free Reserves	Restricted Reserves
Current Year Income		
Expenditure	Free Reserves	Restricted Reserves
Next Year Income		
Expenditure		
Please provide key information regarding your future financial position eg: significant contracts up for renewal, major grant completing etc.		
Details of your Invest Stage 1 Funding Request		
Please read the Invest Stage 1 Guidance Notes on the website before completing.		
INVEST provides long-term funding for the day-to-day running of your charity (core costs) and/or the direct delivery of your charity’s work.		
Please describe the purpose of the grant you are requesting.		
Please describe what difference the grant will make to beneficiaries.		
How much funding are you requesting from us?		
When do you want the funding to start?		
This is when you would like the grant to start from.		
Your Contact Details		
This is the person who will be the main contact for the application.		
Prefix		
Mr/Ms/Dr		
First Name		

Last Name
Title
Your position in the charity – e.g. Grant Manager
Email Address

To the best of my knowledge, the information given on this form gives a true and accurate account of this organisation's work and needs.

I confirm that if this application is successful, I understand that any grant awarded must be spent for the purpose stated in the offer letter, a report must be provided after each year of funding and that my organisation must comply with Lloyds Bank Foundation's [Grant Terms and Conditions](#).

I confirm that my organisation authorises Lloyds Bank Foundation for England & Wales to carry out the following actions without the need to obtain further consent or agreement from me or my organisation

- publish details of financial support given to my organisation and my organisation's objectives;
- pass details obtained about my organisation through the application and assessment process to external agencies, including other grant-making bodies;
- use the supplied contact details to issue a Lloyds Bank Foundation for England & Wales customer satisfaction survey;
- use details about my organisation obtained through the application and assessment process in a Lloyds Bank Foundation for England & Wales press release or publication.

Future Contact Opt-in Statement

Would you like us to keep you up to date on our work? Please indicate your communication preferences below. Your choices have no impact on the outcome of your grant application.

- I'd like to receive all Lloyds Bank Foundation e-updates
- I'd like to receive your newsletter
- Contact me about your funding and development opportunities for charities
- Contact me about your research and policy work
- I don't wish to receive any communications (please note that as a grant applicant you will receive emails relating to your application and your grant if successful).

You can change your mind at any time by clicking the unsubscribe link in the footer of any email you receive from us, or by contacting us at media@lloydsbankfoundation.org.uk.

If your grant application is successful, are you happy for us to share your contact details with other funded charities for the purposes of networking and sharing good practice?

- Yes, I am happy for you to share my contact details
- No, please do not share my contact details

We value your privacy. We'll never share your data with others without your permission and we'll only use it for the purposes we've outlined, and you've agreed to. For more information about our [privacy practices](#) please visit our [website](#). By submitting this form, you agree that we may process your information in accordance with these terms.