

**APPLICATION FOR FINANCIAL ASSISTANCE  
LOCKERBIE TRUST  
SCO19796**

**1 NAME OF ORGANISATION (AS SHOWN ON YOUR CONSTITUTION) OR INDIVIDUAL**  
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**2 WHAT IS THE TITLE OF YOUR APPLICATION?**  
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**3 HOW MUCH FUNDING DO YOU NEED?** £

**4 NAME AND ADDRESS OF CORRESPONDENT (see Guidance Note 1)**

**Your name**

**Your position in the Organisation (if appropriate)**

**Your address (including postcode)**

**Daytime phone number**

**Email address**

**PLEASE GIVE THE ORGANISATIONS BANK OR BUILDING SOCIETY DETAILS AS FOLLOWS.**  
(See Guidance Note 6)

**Sort code**  **Name of the bank**

**Account number**  **Building Society roll number**

**Signature:** ..... **Date** .....  
(your signature is required here for payment purposes)

**5 NAMES AND ADDRESSES OF OFFICE BEARERS (see Guidance Note 2)**

(a) Chairman

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(b) Secretary

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(c) Treasurer

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**6 AIMS AND PURPOSES OF THE ORGANISATION (see Guidance Note 3)**

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**7 CURRENT MEMBERSHIP**

**8 PLEASE STATE THE PURPOSE AND/OR DESCRIPTION OF WORK TO BE DONE AND WHY YOUR ORGANISATION NEEDS THE FINANCIAL ASSISTANCE SOUGHT (see Guidance Note 4)**

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**9 PLEASE STATE HOW THIS APPLICATION WILL BENEFIT THE INHABITANTS OF LOCKERBIE**  
(see Guidance Note 5)

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**10 GIVE AN ESTIMATE OF HOW MANY PEOPLE WILL BENEFIT**

**11 WHAT IS THE TOTAL COST OF YOUR PROJECT**

**12 LIST THE ESTIMATED COSTS OF ALL ITEMS AND SERVICES RELATING TO THIS PROJECT. BE SPECIFIC AND LIST ALL INDIVIDUAL ITEMS. SEND COPIES OF ANY QUOTES OR ESTIMATES YOU MAY HAVE.** (see Guidance Note 6)

Item	Tick each item to be funded by this application	Cost £
TOTAL (this figure should be the same as your answer to question 11 above)	£	

**13 HOW MUCH DO YOU WANT THE LOCKERBIE TRUST TO CONTRIBUTE TOWARDS THE COST?**

**14 HOW MUCH OF YOUR OWN MONEY WILL YOU CONTRIBUTE TO THE COST**

**15 TELL US WHERE THE REST OF THE MONEY WILL COME FROM** (see Guidance Note 7)

Source of funding	Amount applied for	Has this been confirmed Yes or No	When was this confirmed (Please give date or put waiting to hear)

**16 WHAT WOULD BE THE EFFECT ON THE ORGANISATION/PROJECT IF THIS FUNDING APPLICATION WAS UNSUCCESSFUL?** (See Guidance Note 8)

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**17 PLEASE STATE THE BALANCE HELD BY YOUR ORGANISATION AS AT THE DATE OF APPLICATION AND HOW YOU INTEND TO SPEND THIS.** (See Guidance Note 9)

**Balances:** At Bank at date of application

**How do you intend to spend this?**

**18 DID YOUR ORGANISATION RECEIVE FINANCIAL SUPPORT FROM LOCKERBIE TRUST IN PREVIOUS YEARS?**

If **Yes** please give details below

Year	Amount	What the funding was for

**19 PLEASE ENCLOSE THESE ESSENTIAL DOCUMENTS** (see Guidance Note 10). Please tick box

(i) Please provide the following information:

- Constitution of your organisation (see Guidance Note 11)
- Most recent set of accounts (accounts must be audited or certified if annual turnover is over £100,000).

(ii) If your application is over £1,000, please provide the following additional information:

- Annual Report (if available)
- Detailed estimate of income and expenditure
- Business Plan (if available)

(iii) If your staff and volunteers work with children or vulnerable adults, please provide the following information:

- Do your staff and volunteers have a disclosure Certificate
- Who your organisation is registered with to process your disclosures

**20 PLEASE TELL US ANY OTHER RELEVANT INFORMATION IN SUPPORT OF YOUR APPLICATION** (continue on separate sheet if necessary)

**21 PLEASE NOW SIGN AND DATE THE APPLICATION ON BEHALF OF YOUR ORGANISATION** (see Guidance Note 12)

As far as I know, the information in this form is true and accurate. I understand that it may be a criminal offence to receive a grant after giving false information, in which case you will cancel the grant and reclaim any money I have received. I agree that you can check, with others, the information on this application form and any supporting documents. If you award a grant on the basis of the information in this form, I confirm that the project or services I carry out or provide will be as described in this form. I agree that you, or your appointed agents, can examine any documents necessary to show that the project or services have been carried out. I will meet all your funding conditions.

I agree that if there are any changes in the project or services not agreed in writing with you, or if the project does not go ahead for any reason, you can reclaim all or part of any grant you have paid, as appropriate.

I agree that if my application is successful I will acknowledge your contribution on any publicity about the activity that you have funded.

**PLEASE NOTE THAT THE DETAILS SUPPLIED ON THIS FORM MAY BECOME PUBLIC INFORMATION AS PART OF THE DECISION MAKING PROCESS.**

SIGNATURE ..... DATE  
.....

PRINT NAME .....

POSITION IN ORGANISATION .....

**APPLICATIONS WILL CONTINUE TO BE CONSIDERED THROUGHOUT THE FINANCIAL YEAR, DECISIONS WILL BE DEPENDANT ON THE AVAILABILITY OF BUDGETS.**

**Return to**  
Principal Officer Partnership Support, Community & Customer Services Annandale and Eskdale, Dumfries and Galloway Council, Council Offices, High Street, Annan, DG12 6Q  
tel: 030 3333 3000

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## GUIDANCE NOTES FOR APPLICANTS

- 1 The correspondent should be the member of your organisation who will be available for answering possible queries about the application.
- 2 If this structure does not apply to your organisation please ensure a correspondent is identified.
- 3 The aims and purposes of the organisation should describe what it is aiming to achieve. Please also include the number of members of your organisation and the main towns and villages from which membership is drawn.
- 4 The purpose for which grant aid is sought will vary from applicant to applicant. It may be you need a contribution to general running costs, the cost of particular items of expenditure e.g. hire premises or the purchase of equipment. Please be specific. It is important to state clearly why your organisation needs the financial assistance sought. If it would be more convenient, please complete on a separate sheet. If appropriate, please indicate the anticipated number of people who will benefit from your project.
- 5 Lockerbie Trust exists to benefit the inhabitants of the Lockerbie it is therefore essential you detail how your project will benefit the inhabitants of Lockerbie.
- 6 Please be specific and detail **all** items and services relating to this project, 3 quotations or estimates are required for appropriate works and supplies over £5,000 and should be attached to your application.
- 7 This information allows the Trustees to make an informed decision based on the resulting outcome of funding being approved or refused.
- 8 Please detail how the project would proceed without funding from the Trust, if the project can not proceed without funding from the Trust please tell us why.
- 9 This information will enable the Trustees to ascertain whether assistance is actually **needed** by the organisation.
- 10 The attachments requested are absolutely essential if your application is to be considered fully. Without attachments, your application may be delayed and possibly rejected for lack of information.

### Essential Supporting Papers - Checklist - **HAVE YOU ENCLOSED?**

If you are applying for £1000 or less:

- **CONSTITUTION**
- **ACCOUNTS (AUDITED OR CERTIFIED ACCOUNTS IF ANNUAL TURNOVER IS OVER £100,000)**

If you are applying for over £1000, additional documents:

- **ANNUAL REPORT (if available)**
- **DETAILED ESTIMATE OF INCOME & EXPENDITURE**
- **BUSINESS PLAN (if available)**
- **DISCLOSURE INFORMATION**

- 11 If your organisation does not have a constitution a member of the Council's staff may contact you once your application has been received to discuss the status of your organisation.
- 12 Please ensure all appropriate information is supplied. Failure to do so may result in delay in consideration of your application. Remember to sign and date the application on behalf of your organisation.
- 13 Trustees may award grants for any purpose as long as they consider that it will be for the benefit of the inhabitants of Lockerbie.
- 14 Applications will be considered by Trustees at their meetings throughout the year. Decisions will be dependent on the availability of budgets.
- 15 Grants will be awarded to organisations which do not exist by virtue of Statute, have definite Aims and Objectives and use any profit for the aims and objectives of the organisation.
- 16 Grants may also be paid to organisations for major projects.
- 17 Funding will only be granted to properly constituted organisations and where the organisation is able to demonstrate in detail how the grant will be of lasting benefit to the inhabitants of Lockerbie.
- 18 Funding will be given to organisations who demonstrate efforts to raise their own funds.
- 19 The level of free reserves held by the organisation will be taken into account, where the organisation has sufficient free reserves to undertake the project no award will be made.
- 20 Applications from individuals will be considered and must reside within the agreed geographic boundary.
- 21 Grants will not be paid to national organisations that do not demonstrate specific benefit to the inhabitants of Lockerbie.
- 22 Where the application will involve work with vulnerable people, the necessary Disclosure Scotland or Central Registered Body in Scotland (CRBS) police checks and at the appropriate level must have been carried out.
- 23 Applicants should detail all other sources from which grant aid has been sought and the level of grant aid awarded.