|  |  |  |
| --- | --- | --- |
|  | **Organisational Development Fund  Guidance Notes** | **A logo with colorful dots and circles  Description automatically generated** |

## Overview

This fund is to strengthen groups and organisations through making a necessary developmental ‘step change’ needed to become more stable and resilient.

Organisational Development focuses on supporting groups towards sustainability through improving capability and / or capacity.

You can use this funding to create or make changes to your strategy, structure or processes for an entire system, your overall organisation, an area of work or a specific role or job.

## Fund priorities

The fund focuses on organisations addressing local need in at least one of the following priority areas:

* No poverty
* Good health and wellbeing
* Reduced inequalities
* Decent work and economic growth

You must be able to demonstrate how an Organisational Development grant will support your group or charity to become more stable and resilient.

## What grants can be used for

The programme has had a positive impact for previously funded groups and those they work with.

* Some were able to change their finance software saving them time.
* Others applied for funding for a dedicated fundraiser to support their diversification of income streams.
* Others trained staff, key volunteers and trustees to improve organisational leadership and others increased their administration hours to review policies, procedures and systems.

Examples of what the fund can support are below (this list is not exhaustive):

* Business planning and development
* Developing governance and leadership (e.g. charity registration or registration as a form of social enterprise)
* Developing monitoring and learning
* Fundraising planning and development (note – we cannot fund commission-based work)
* Increasing leadership capacity to support collaboration and partnership working
* Marketing and communications
* Piloting a project that could create a new revenue stream
* Purchasing software to support your organisation
* Staff, key volunteer and trustee training
* Testing new ways of working

We can support a [Full Cost Recovery](https://www.tworidingscf.org.uk/frequently-asked-questions/) contribution towards core overhead costs (rent/ heating/ lighting etc) as part of your application. We cannot accept applications where core costs are the majority of the requested amount.

**The fund will NOT support the following:**

* Project / activity costs – we understand that staff and project delivery are important to organisations but that is not the focus of this fund. By project we mean activities such as lunch clubs, youth sessions, educational classes etc.
* Capital costs – small capital items can form part of the budget but should not make up more than 20% of the amount applied for. Note – we count these as non-consumable items that would have a life beyond the end of your project (e.g. laptops, tools, furniture etc).

## Who can apply?

Organisational Development grants are targeted at small organisations (below £500,000 annual turnover) with charitable aims where a small amount of money can make a significant difference. You can apply if you are based in, or serving the people of:

* York
* **Rural** North and East Yorkshire - you are unlikely to be successful if you are based in urban north and East Yorkshire. (We define rural as work serving places with populations under 15,000 people.)

## How much you can apply for

**You can apply for up to £10,000.**

**Application deadline – noon on Monday 11th November 2024.**

Decision will be communicated by 20th December 2024.

## Organisational / Group Eligibility

In order to apply to the Organisational Development Fund your organisation must be:

* Either a small voluntary organisation, community group, small charity or other type of not-for-profit organisation, provided that the purpose of the grant is wholly charitable (please see our [FAQs](https://www.tworidingscf.org.uk/frequently-asked-questions/) for additional requirements for CIC’s & CBS’s ).
* Be based in and / or delivering activities or services in primarily for the benefit of people in **rural** North and East Yorkshire or York.
* Have a governing document (also known as a constitution, rules, memorandum, or articles of association) in the name of their organisation which outlines their charitable objectives and includes a charitable dissolution clause with a named body in their asset lock.
* Have a bank account in your group/ organisation’s name with at least two signatories, who are not related to one another.
* Have an annual income of under £500,000 per annum.

## Who and what cannot be funded?

|  |  |
| --- | --- |
| * Private Businesses or individuals * General appeals or sponsorship * National organisations and their affiliates * Work which has already started or taken place / retrospective funding * Work normally funded from statutory sources * Work undertaken by or on behalf of statutory bodies as part of their statutory activities * Prize money * Purchase of gifts * Work of a political nature * Loans, deposits or on-granting * Teacher training | * Work undertaken by / on behalf of schools, colleges or universities as part of their statutory curricular activities * Work where the main beneficiaries are animals * Work which does not directly benefit people living in the area of benefit * Overseas holidays or trips * Organisations that mainly give funds to other organisations or individuals * Work for the advancement of religion (applications are accepted from religious groups working in the community provided that the main focus of the project is not proselytising) * Work normally undertaken by infrastructure organisations |

## How to apply

* Ensure you meet all the eligibility and fund criteria above and that the fund is currently accepting applications.
* Complete the online application form. A link to this is found on the [Organisational Development Fund](https://www.tworidingscf.org.uk/fund/organisational-development/) page of the Two Ridings website.

The online application process is straightforward and provides an option to save your application as you go so you can dip in and out of the application before you submit it. If required, a paper version of the application form is available on request.

* Attach your supporting documents (listed below) to the online application. If you have requested a paper version, please send your completed application form along with copies of your supporting documents to: Two Ridings Community Foundation, Pavilion 2000, Amy Johnson Way, YO30 4XT
* The organisation’s constitution / governing document / set of rules
* Contact details (address & email) of your management committee / trustees / directors.
* The organisation’s most recent annual accounts or financial records that show your organisation’s balance of funds, income and expenditure. If you do not have financial records that cover a full year then you will need to provide a set of management accounts.
* A safeguarding policy if your organisation works directly with children or vulnerable adults.

**Applications will only be processed when all documentation has been received.**

If you do not have all these documents, please do get in touch; we may still be able to consider your application or signpost you to further support.

* If your application is successful, you must provide a copy of a Bank Statement (dated within the last three months) or Paying in slip in the name of the organisation applying. We cannot accept transaction lists or screenshots of transaction. [Click here](https://www.tworidingscf.org.uk/wp-content/uploads/2023/10/bank-statement-guidance.pdf) for some guidance on your bank statement.

**NOTE** – **if successful, you must submit your bank statement within 4 weeks of your ‘grant awarded’ notification** **otherwise your application will be withdrawn**. Please make sure you have access to a statement when you apply.

## Assessment and Award

* All eligible applications will be assessed. One of our volunteer or in-house assessors may contact you to chat about your application to help us better understand your funding request. This may be over the telephone or in person. When assessing applications, we will look at the following:
  + How your group/activity is set up and managed
  + How well your finances are managed
  + Evidence of need for your project
  + Your commitment to ensuring equal opportunities and the inclusivity of your project
  + Value for money offered by the project
  + How well the project meets the fund criteria and the priorities
* All eligible applications will be considered by a funding panel, which may include community members, people with lived experience and / or donors, and Two Ridings Grants committee members. The final decision cannot be changed, and no discussion will be entered into, although we will try to provide constructive feedback if we can. In certain circumstances applicants will be awarded a pledge. This is the promise of a grant if/when certain conditions are met within a defined timescale.
* There is no appeals process for grant awards. If an applicant feels dissatisfied with the outcome, they can make a complaint and our [complaints policy](https://www.tworidingscf.org.uk/key-documents/) provides the detail of how to do this.
* Following the panel meeting, we will contact you by email to let you know the outcome. We aim to give you a decision within 8 weeks of the application deadline.

## Monitoring and Evaluation

* + When your project is complete, you must fill in an End of Grant Monitoring Form. This is available as an online form very similar to the online application form and should your application for funding be successful, the link to your end of grant report will be sent to you when your grant payment is made. After your grant period, you will not be eligible to apply for further grants from this scheme until we have received this form, as it finalises your grant.
  + We aim to undertake monitoring visits on a proportion of funded applications, and we will contact you to arrange a visit if this is required.
  + Successful applicants mustensure that Two Ridings is included in any publicity and our logos will be provided for this purpose.

If you require any assistance with the completion of your application, please contact Two Ridings on 01904 929500. We are happy to help**.**

## Equality, Diversity and Inclusion

Two Ridings is committed to equality, diversity and inclusion and ensuring an equity of access to all groups and organisations. We expect groups and organisations applying for grants to show that they are aware of equality, diversity and inclusion and can demonstrate commitment to them.