

## GRANT APPLICATION FORM

The Eight Foundation is a grant making charity supporting general charitable purposes in Hampshire and the surrounding counties. The Eight Foundation was formally registered in July 2017 under charity number 1174600.

### ***THOSE WHO ARE ELIGIBLE FOR A GRANT***

- Grants are made to charities and individuals at the discretion of the Trustees
- Charities must be registered with the Charity Commission
- Charities/individuals must be based in Hampshire or the surrounding counties

### ***Other considerations:***

- Applications will be considered on merit alone
- You must be able to identify your connection or association with Eight Wealth Management
- Charities should be involved in the areas of health, education and/or poverty
- The Foundation will not normally support applications from large national charities i.e those with an annual income in excess of £250,000 or with £500,000 of assets, or charities dedicated to issues deemed by the Trustees to be already well funded within the Hampshire and its surrounding counties
- The Foundation grants are restricted to a maximum amount of £5,000.00. Trustees can at their discretion increase the funding offered where it is deemed appropriate to fulfil a particular grant

### GRANT APPLICATION PROCEDURE

To apply to The Eight Foundation for a grant, a charity must complete the application form. The application process is online only and all documentation is available on our website, [www.eightfoundation.co.uk](http://www.eightfoundation.co.uk).

Applications can be submitted at any time throughout the year to:

The Trustees  
The Eight Foundation  
1460 Parkway  
Whiteley  
Hampshire  
PO15 7AF

Email: [info@eightfoundation.co.uk](mailto:info@eightfoundation.co.uk)

Telephone: 01489 555180

Please note that applications will only be assessed for grant making between 1 September to 1 December each calendar year, however, you are able to submit your application at any time throughout the year.

*Please refer to our Grant Making Policy for full details and disclosures of The Eight Foundation.*

Please confirm your association with Eight Wealth Management:

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Information requested in this application form is the minimum required for a grant to be considered. **Applicants should enclose additional information as necessary. Please email a copy of the application form and the charity's latest annual report and audited accounts.**

## 1. CONTACT DETAILS

Name of charity/individuals:
Name of contact person:
Job title of contact person:
Availability of Contact Person:
Address for correspondence:
Telephone number Switchboard: Direct Dial:
Email address:
Website:
Registered charity number:

## 2. APPLICANT CHARITY

Description of the main purpose of the charity:
If available, please enclose an executive summary of the charity's strategic business plan. Please do not send the full plan.
Geographic area served by the charity:
Year founded:
Number of staff Full time / part time: Volunteers:

### 3. GRANT

Size of grant requested:
Main category into which the grant would fall (please circle)
Health
Education
Poverty

### 4. ACCOUNTS INFORMATION

	From latest annual accounts	For previous year
<b>Total income</b>	£	£
Statutory income	£	£
National Lottery Funding	£	£
Fundraising/Charitable Grants	£	£
Fees or subscriptions	£	£
Sales	£	£
Other	£	£

Total Expenditure		
Charitable purposes	£	£
Fundraising/Publicity	£	£
Management/Administration	£	£
<b>Surplus (Deficit)</b>	£	£

## 5. ASSETS

Cash	
Investments	
Property	
Other	
Total liabilities	

### ***DECLARATION***

I, \_\_\_\_\_ am an authorised representative of  
\_\_\_\_\_ (name of organisation).

To the best of my knowledge the information I have provided on this application form is correct. If The Eight Foundation agrees to make a grant the money will be used exclusively for the purposes described in this application form.

Signed:
Position in organisation:
Date:

## **1. The Objects of The Eight Foundation**

The Eight Foundation is a grant making charity supporting general charitable purposes. It is the policy of the trustees to make grants to a wide range of charitable bodies and individuals. The objects for which the charity is established are such general charitable purposes for the benefit of the public as the trustees from time to time in their discretion think fit.

The trustees of The Eight Foundation seek to support through grants, primarily but not limited to, registered charities and individuals within Hampshire and the surrounding counties.

## **2. Priorities for support**

- 2.1** The number of projects which can be supported is through necessity, limited by the amount of funds available for distribution in any year.
- 2.2** The priorities will be reviewed every year (or more often if deemed appropriate by the trustees), and may be changed in accordance with the trustee's view of the most effective application of available funds at any point in time.

## **3. Principles**

In awarding grants, the trustees will apply the following principles:

- 3.1** Applications from Hampshire and the surrounding counties are eligible for consideration and all applications will be considered on merit alone.
- 3.2** All applications from previous recipients of grants or from previously unsuccessful applicants will be considered on merit alone.
- 3.3** The Foundation will work in partnership with other organisations where appropriate to fund initiatives beyond the financial scope of a single organisation Trustees reserve the right to request information on other donors.
- 3.4** The Foundation will not normally support applications from large national charities i.e. those with an annual income in excess of £250,000 or with £500,000 of assets, or charities dedicated to issues deemed by the Trustees to be already well funded within the Hampshire and its surrounding counties.

**3.5** The trustees reserve the right to not approve any application if through its decision making, it determines that the resulting grant would not be charitable, or would conflict with the foundations stated policies or damage its reputation.

**3.6** The Foundation grants are restricted to a maximum amount of £5,000.00, this figure will be periodically reviewed and amended by the board of trustees as they see fit. Trustees can at their discretion increase the funding offered where it is deemed appropriate to fulfil a particular grant.

#### **4. Exclusions**

The trustees will not normally approve the use of the charities funds for:

**4.1** Purposes for which the government has a statutory responsibility to provide for.

#### **5. Grant Application Process**

All Applications for grants should be completed in conjunction with this policy. They must be made using the online application form on the charity's website ([www.eightfoundation.co.uk](http://www.eightfoundation.co.uk)) or by sending a hard copy of the application form (which can be downloaded on the website) to: The Eight Foundation, 1460 Parkway, Whiteley, Hampshire, PO15 7AF

**5.1** Information requirements before awarding a grant.

All Applicants:

Before awarding any grant to an organisation or individual, the trustees require that the application should:

**5.1.1** Inform the trustees of the purpose of the application details of the project, the way in which the grant will be used and how it will be managed effectively for its intended.

**5.1.2** Inform the trustees of the names of those who are to be involved with the project/work to be carried out and the identity of the person(s) who will be responsible for the administration of the grant.

- 5.1.3** Provide adequate information regarding the identity and financial status of the applicants and/or of the status of the person(s) who will carry out the project work;
- 5.1.4.** Demonstrate that the recipient (whether an organisation or individual) has and will be adequately insured both in relation to any equipment and facilities purchased by the grant but also in relation to any risk of injury arising by reason of the project or purposes for which the grant is awarded including injury to those participating in that project or those purposes;
- 5.1.5.** Sign the application form to state that the applicant (or in the case of applicants by persons under the age of eighteen years by his/her parent or legal guardian) undertakes to comply with the terms and conditions and all information provided by the applicant is correct.

## **6. Assessment Process**

- 6.1** All grant applications will be subject to initial assessment to ensure they meet the basic criteria for funding. Applicants must be prepared to provide such other information as the trustees may reasonably require in order to assist them in their decision making.

Grants will be considered by the trustees at their meetings, and the trustees will aim to inform all applicants of the outcome within 3 months following the assessment period dating 1 Sept – 1 Dec.

- 6.2** Applicants should note that as with many other charitable trusts, The Eight Foundation may receive far more applicants that it has funds to support. Even if a project fits within the criteria and priorities of the charity and a detailed assessment has been made, The Eight Foundation may still be unable to provide a grant.
- 6.3** The trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful.

## **7. Monitoring and Publication**

- 7.1** It is the policy of the trustees to monitor all grants made. To this end, before a grant can be confirmed, conditions will be stipulated appropriate to the work to be carried out and progress will be assessed against agreed targets and/or milestones if the grant is payable in instalments, then payment of subsequent grant instalments will be dependant on satisfactory progress having been demonstrated and the trustees reserve the right to withdraw the grant on receipt of unsatisfactory progress reports. The grant recipient should inform the Foundation of any extenuating circumstances whereby the submission of any report is delayed, to allow a mutually acceptable date for submission to be agreed.
- 7.2** Monitoring visits by representatives of the foundation may be expected during the period of a grant.
- 7.3** The trustees also expect to receive any copies of published articles, papers and other public communication which may result from the project.

## **8. Purposes as Restricted**

- 8.1** In gifting by bequests donors should note that the foundations matched funding promise will not be standing. If the designated bequest be for a restricted use donors should consider providing the foundation with a copy of the clause in the will pertaining to the bequest. This will be particularly helpful for receipting the estate at the appropriate time.
- 8.2** The Eight Foundation will match financial donations to the foundation on a predetermined ratio of 1:1. For all donations received cumulatively subject to an annual maximum of £100,000 per calendar year. Matching contributions will be paid on a monthly basis for all Eight Wealth Management staff and quarterly for all other donations.