

**Tier 3 is a two-stage application process - Applicants are required to discuss their project with us prior to submitting an Expression of Interest Form. You can contact us by email [info@soirbheas.org](mailto:info@soirbheas.org) or call us on 0751 445 2783.**

**Please read the information below carefully before you complete your application.** The grant documents are updated regularly so please make sure you have the latest version which can be found on the website [www.soirbheas.org](http://www.soirbheas.org) or by request.

Please note – Soirbheas has a restricted grant budget and seeks to deploy this to deliver the optimum benefit across the widest range of community activity that might be eligible for funding. This means that we may not be able to fund all requests for funding groups. Early discussions with our Community Development Officer are important as we might also be able to identify other funding opportunities for your project.

### Soirbheas Funding Criteria

Soirbheas is committed to the following objectives in its business plan and will consider projects which fully meet two or more of the objectives:

1. Improving the energy efficiency of the housing within our communities to improve the quality of life for low income households, increasing their available income. We will also focus on housing stock of more than 50 years old, which accounts for a large percentage of housing within our area, as over 53% of houses in the area fail the SHQS Energy Efficiency Test (Scottish Gov.).
2. Protecting our environment for future generations; as we live in an area of renowned natural beauty. Increasing the number of people aware of the effects of climate change and actively engaged in activities to limit this. Developing green tourism within the area.
3. Strengthening the local economy by encouraging new businesses and community organisations e.g. by improving broadband availability and reliability, encouraging people to support local businesses and creating employment/training opportunities for our young people reducing the need for them to leave the area to find all year-round employment, encouraging sustainable solutions that meet community needs.
4. Improving the quality of life of the elderly and vulnerable, including young people, within our community. Enabling people to stay in their own homes for longer and for people to have equal opportunities in life.

Soirbheas will focus funding allocation primarily on projects meeting the agreed community priorities above and operate an open, clear and equitable scheme with stated eligibility criteria, based on the merits of individual project proposals.

In addition, Soirbheas has set some specific commitments designed to achieve the above objectives as follows:

1. In line with the first objective we want to see household fuel costs reduced as a proportion of total income and local residents benefiting from more fuel-efficient homes. To this end, we have already, at the end of 2013, undertaken an initial survey of the local housing in order to identify where energy savings might be possible. The next stage will be to provide households with practical information on energy saving, obtaining grants (from other organisations) for improvements, etc. and Soirbheas is seeking additional grant funding to help support this work.
2. Protecting our environment is a key element in maintaining a sustainable environment for future generations. In order to achieve our second objective, Soirbheas will seek to support projects that reduce the effects of climate change. Specific commitments are to promote waste recycling and production of local food, to support development of two micro hydro projects and renewable energy schemes and to

raise awareness of the impact of climate change. However other projects will also be supported such as green tourism

3. In relation to the third objective we want to see the economy and capacity of our communities become more sustainable and resilient. In order to meet this commitment, we aim to provide financial support to voluntary/community groups; to help provide new training and employment opportunities, (in particular for young people); e.g. establish apprenticeships, developing partnerships that provide sustainable activities or services such as local transport, childcare or improve the health or wellbeing of a community such as increasing walking/cycling or producing local food and to encourage a move towards “energy independence” within the community.
4. We will support projects that help make it possible for the elderly and vulnerable to stay in their own homes for longer; we will investigate the current and future needs of this group and support local care providers to deliver the required services. To reduce the sense of isolation for vulnerable people. Soirbheas will also support projects such as internet usage/training projects, lunch clubs, handyman schemes as well as projects that encourage young people to develop socially, educationally and to become actively engaged in the community.

### Who Can apply

- Constituted groups: Charities; not for profit organisations; voluntary groups; cooperatives and social enterprises which require funding to support projects consistent with the purposes listed above may apply for a grant.
- You don't need to be a registered charity to apply, but your organisation must have a constitution (governing document or set of rules). A group must have been in existence for at least 12 months or be able to demonstrate an ability to deliver the proposed project.
- Open to all organisations regardless of size, but the board of Soirbheas reserves the right to refuse funding to an organisation on the basis of income and/or profit or lack of a robust business plan.
- A group that can demonstrate it has the skills and experience to deliver the project.

### Examples of What We Will Fund

Projects which fully meet two or more of the objectives (outlined above) that:

- Provide community facilities or provision, particularly projects that support the needs of the elderly, vulnerable and young people;
- Improve local transport infrastructure;
- Promote recycling, reduction of waste including food/growing initiatives e.g. allotments;
- Projects Developing the local economy;
- Projects that Build community capacity and cohesion;
- Projects to Improve energy efficiency including renewable projects;
- Environmental education, protection and enhancement;
- Purchase, development or maintaining a community asset/land; and/or
- Purchase of assets, equipment for the direct benefit of the community.

Tier 3 is a capital programme and will fund up to 60% of the total capital costs of a project up to £30,000 (some elements of associated costs may be considered e.g. architect's fees, planning consent legal fees etc if it can be evidenced that they are an integral part of the capital scheme). It is important to bear in mind that there is no guarantee of ongoing support therefore organisations must have a robust business plan in place to support the project. A key focus of the fund is sustainability and viability and as such we would encourage groups to be working towards being self-sustainable where possible.

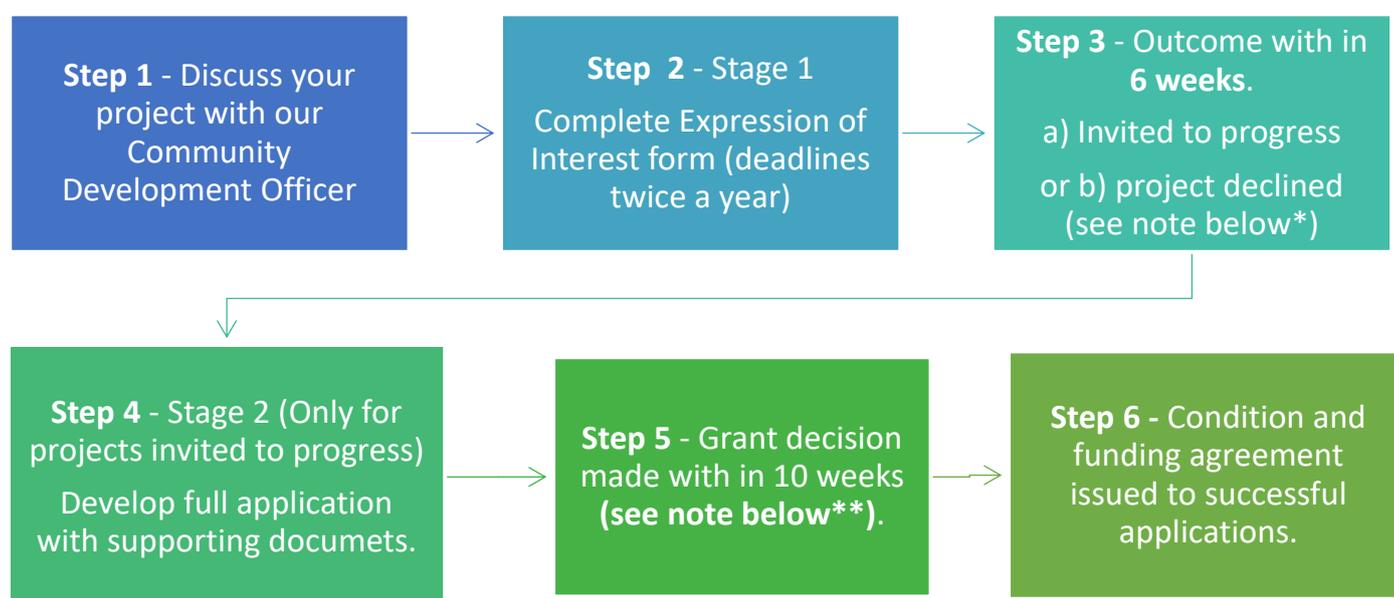
Applications must have identified sources of match funding prior to submitting an expression of interest. and/or be able to show and demonstrate efforts have been made to raise money through grant awards, local fundraising activity and/or in-kind support.

The beneficiaries of projects must be resident in the Glen Urquhart or Strathglass Community Council areas\*.  
**\*The funding area is defined by the Glen Urquhart and Strathglass Community Councils boundaries.**

## What We Will Not Fund

- Private businesses, public sector, or organisations without a constitution
- Costs of energy consumption
- Loans, repayment of loans or payment of debts
- Costs already incurred or activities which will take place before we have made a decision on an application (retrospective funding).
- Payments towards areas or services generally understood to be the primary responsibility of statutory authorities.
- Applications that are for the sole benefit to flora and fauna. Applicants are invited to demonstrate the direct benefit to the local community and/or service users in cases where the grant application is concerned with flora and fauna.
- No funding for political or religious activities – but such organisations can apply for funding where there will be a non-religious/political orientated community benefit consistent with Soirbheas' charitable objectives.

## Application Process



**Notes** – \*Applications will not be invited to Stage 2 (full application) for one or more of the following reasons: if the project is unlikely to secure match funding, if the project is viewed not to be ready, can't demonstrate viability, doesn't meet Soirbheas' funding objectives or there is not enough funding available to support the project.

\*\*A grant award decision will be made within 10 weeks of the full application deadline. At this point, if the applicant is still in the process of procuring match funding then Soirbheas will provide a letter confirming the amount and terms of the award which the applicant may choose to use in support of other funding applications.

## Tier 3 Funding Policy

A set of project assessment criteria will be used to assess the suitability of the projects and measure them against Soirbheas' charitable objectives and funder objectives. Decisions on Tier 3 applications are made by the Soirbheas board made up of local representatives.

- Projects receiving funding must be consistent with the Co-op Bank's ethical policy.
- An organisation can have more than one Tier 3 application progressing **if** they can demonstrate the capacity to deliver the projects and have secured match funding.

- Tier 1 or Tier 2 grants can be applied for a distinct phase of the same project or follow development phases but cannot be used as match funding for a Tier 3 project or for the same phase.
- Applicants must agree to Soirbheas' terms & conditions, including payment and reporting schedule and provide regular progress updates and completion report.
- VAT is not an eligible project cost unless you are unable to reclaim VAT.
- Funding must be spent within **18 months** of the award date.
- Demonstration of need required (e.g. evidence of community consultation).
- Tier 3 will support up to 60% of capital costs.
- Projects must fully meet **two** or more of the objectives.
- **\*\***The funding year will be determined by Soirbheas' financial year (1st April to 31st March).

Deadlines may be subject to change please check the website or talk to the Community Development Officer.

Application forms are available on the Soirbheas Website: <http://www.soirbheas.org/soirbheas-grant-programme/>

## The 'Are You Ready' Test?

**If you can only answer 'YES' to half the questions, then talk to use to see if we can help to progress your project.**

If you can answer 'Yes' to all the questions, then you're ready to apply!	Yes	No
*Does your project meet at least two of Soirbheas objectives fully?		
Have you spoken to the Soirbheas Community Development Officer?		
Do you have evidence of need for this project?		
Do you have full costings and budget for your project?		
Do you have a business plan for your project?		
Do you have all the planning and permissions in place (if required)?		
Have you identified or secured your match funding?		
Is there a group of people available to drive this project?		
Is your project going to be sustainable in the future?		

## Completing the Expression of Interest Form

Please read the form carefully and answer ALL the questions fully giving as much information as possible. If you do not do this, it could result in your application being delayed or rejected.

### SECTION 1:

1. Please ensure you provide all the necessary information so any queries can be addressed as quickly as possible.
2. Make sure the main contact is someone who is familiar with both the workings of the group and the grant application, as we may need to speak to them if we have any queries.

### SECTION 2:

1. Please tell us about your organisation, what are its main activities, how many volunteers you have and how many members you have including their gender and age range.
2. Please describe your project as fully as possible – its aims, the activities involved, intended benefits and any key deadlines.

3. The more information you provide about how your project meets Soirbheas' objectives the greater the likelihood of a successful application.
4. If you need more space to complete your answer, please continue on a separate sheet.

### SECTION 3:

Please ensure you enclose all the documentation as your application cannot be processed without them.

### SECTION 4:

Please provide name and contact details for your organisation in relation to this project.

### SECTION 5:

Please ensure the form is signed and dated.

Documents Required	Stage
A copy of the organisation's constitution.	1 & 2
A copy of the most recent annual accounts.	1 & 2
A detailed project budget including full costing along with - 2 quotes for items £300 - £500. 3 quotes for items £501 - £2,000. Formal tender for items over £2,000 may be required	2
A copy of your business plan including a 5 year budget.	2
Detailed Project timetable.	2
A copy of the organisation's Child & Vulnerable Adults Policy (if applicable).	1 & 2
Copies of planning consent, lease agreements or contracts etc.	2
Any additional information to support your application e.g. letters of support, research or surveys etc.	2

## What Happens Next?

We will acknowledge receipt of your application. In some cases, we may contact you by phone or email for additional information needed to process your application.

The decision on whether your application will progress to Stage 2 will be made by the grant panel within 6 weeks of receipt of the application deadline. Applications that pass the Stage 1 assessment will be invited to submit a full application along with supporting documents outlined above. For projects not invited to Stage 2 Soirbheas will provide formal feedback and where appropriate will endeavour to provide support to assist organisations to further develop their projects.

Successful applications - Projects that are awarded funding may start to draw down funds as soon as all of the match funding has been confirmed, proof of need (e.g. quotes, invoices, etc) and the agreed milestone have been met.

**The grant award must be drawn down within 18 months of notification of the award. If this is not possible and the applicant still requires the funding, then the applicant may apply for an extension to this period of no more than 12 months which Soirbheas will consider before any decision to allocate the remaining funds to other community projects.**

