

THE HARRIS CHARITY

GRANT APPLICATION FORM

Guidance for Applicants

Before completing this application please read these guidelines carefully.

Purpose of Trust

The Trust can assist throughout Lancashire, though Preston District has special priority. Its aims are to provide for the benefit of persons under the age of 25 who have a permanent residence in the County:

- (a) in relieving the need, hardship or distress of such persons;
- (b) in promoting the education, including social and physical training of such persons;
- (c) in providing financial assistance, outfits, clothing, tools, instruments, equipment or books to enable such persons on leaving school, university or other educational establishment to prepare for, or to enter, a profession, trade or calling;
- (d) in apprenticing such persons to some useful profession, trade or calling;
- (e) in providing or assisting in the provision for such persons of facilities for recreation or other leisure-time occupation in the interests of social welfare with the object of improving the conditions of life for such persons;
- (f) in making grants or donations to charitable institutions or organisations having for their object the benefit of such persons.

The Trustees are not authorised to apply income of the Charity directly in relief of rates, taxes or other public funds, but may apply income as supplementary relief or assistance provided out of public funds.

Policy

Grants made by the Trustees will be directed towards implementing the purposes of the Trust. It will not be the practice to make grants to finance course fees, supplement living expenses, meet salary costs or make general grants to groups travelling overseas. Expenditures incurred prior to grant approval will not be reimbursed.

Applications made by individuals must be accompanied by supporting references from responsible referees (viz – Schools, Colleges, Social Services, Vicar, Priest, Minister, or such authority as the Trustees may decide to accept).

Applications from charities must indicate the official registration number as issued by the Charity Commission. Also, the Trustees will require to see evidence from the Chief Inspector of Taxes, Claims Branch, as to exempt charity status for Income Tax.

All applications must set out in Section 4 of the application from what other fundraising and self help they have achieved or hope to achieve.

The Trustees advertise in the local press twice yearly in March and September for applications. The half yearly dates by which the applications must be submitted are **31 March** and **30 September**. Successful applicants are notified in July and January respectively following the closing date each year. Each request for a grant must be made on an official application form.

The Trustees may at their discretion insist on a full reporting back procedure to ensure that grants have been expended in accordance with the application.

Please return this form together with a stamped addressed envelope to: P R Metcalf FCA, The Secretary, The Harris Charity, c/o Moore and Smalley, Richard House, 9 Winckley Square, Preston, Lancashire, PR1 3HP.

THE HARRIS CHARITY - GRANT APPLICATION FORM

Please type or print clearly. Complete all sections, marking N/A to those not applying to your application

1	<p>Your name</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Address (If student, this is your permanent home address and not your term time address)</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
	<p>Position in organisation / group (If any)</p> <p>.....</p> <p>.....</p>	<p>Telephone number</p> <p>Daytime :</p> <p>Evening :</p>

2	<p>Name of individual to be helped</p> <p>.....</p> <p>Date of birth of individual</p> <p>.....</p>	<p>Address of individual</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Telephone number</p> <p>.....</p>
	<p>Name of organisation / group to be helped</p> <p>.....</p> <p>How long has the organisation / group been in existence ?</p> <p>.....</p> <p>Is the organisation / group affiliated to any national or regional organisation / group. If so, which ?</p> <p>.....</p>	<p>Address of organisation / group</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>Telephone number</p> <p>.....</p>
	<p>Membership of organisation / group</p> <p>Total number of members</p> <p>How many members are under 25</p> <p>How many adult leaders are there ?</p> <p>Paid</p> <p>Voluntary</p>	<p>Is it a Registered Charity ? Yes / No</p> <p>If so please quote Registration number</p> <p>.....</p> <p><i>Please forward evidence of exempt Charity status for income tax if applicable</i></p>

3

Is the application for a person or organisation in Preston or Lancashire ?
(Please state where the grant will be used and provide any available plans)

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Describe as simply as possible what you want to do, outlining what need it is designed to meet, how it will bring practical benefit to young people or involve the young in giving practical help to other people. Use this space also to give particulars of applications for grants for individual young people.

When did / will it commence ?

.....

When do you expect to complete it ?

.....

How does the project relate to the Trust's area of purpose ?

.....

.....

Please attach drawings, plans, copy of tenders and planning permissions to this application if available. (This information is not absolutely necessary in an initial application).

Expenditure

What is the total cost of the proposal? £

Dates finance required

Please supply a detailed summary of expenditure including pro forma invoices, analysis of equipment, cost etc.

How much have you already raised?

From what sources?	Amount	Gift in Kind
.....	£
.....	£
.....	£
.....	£

How much do you hope to raise from other sources?

(eg: government or local authorities, fundraising events, other Trusts, subscriptions, sponsorships, charges etc. Is anything promised?)

From what sources?	Amount	Gift in Kind
.....	£
.....	£
.....	£
.....	£

Does the project depend on the full grant sought from the Trust? Yes / No

How much are you seeking from the Trust? £

How did you learn about the Trust?

.....

Have you previously had a grant from the Trust? Yes / No

If you are successful, to whom should the cheque be paid?

(Cheques cannot be made payable to an individual or statutory body. If necessary, please find a voluntary organisation to accept it on the applicant's behalf.)

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N.B. In the case of individual applications the enclosed financial information sheet MUST be completed.

An existing organisation should submit a copy of its latest statement of accounts. (If no accounts are available the enclosed financial information sheet MUST be completed).

I have read the "Guidelines for grants" of the Harris Charity and confirm that the information given is Correct to the best of my knowledge. I accept that the decision of the Trustees of the Charity is final.

Signed Date

Financial Information Sheet

Application by / or for an organisation or group

Please supply latest accounts or where none are available please complete the following:

Analysed weekly or annual income

..... £

..... £

..... £

..... £

..... £

Analysed weekly or annual expenditure

..... £

..... £

..... £

..... £

..... £

Assets and investments owned at date of application

..... Market Value

..... £

..... £

..... £

..... £

..... £

Liabilities at date of application

..... £

..... £

..... £

..... £

..... £

Any other relevant information

.....

.....

.....

.....

THIS FORM MUST BE COMPLETED

Financial Information Sheet
Application by / or for an individual

Please type or print clearly. Complete all sections marking N/A to those not applicable

Total weekly or annual income

(Including vacation earnings)

Please separate sources

	<u>Applicant</u>	<u>Mother</u>	<u>Father</u>
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....

Assets and investments owned at date of application

(Please use a continuation sheet if necessary)

	<u>Applicant</u>	<u>Mother</u>	<u>Father</u>
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....

Liabilities at date of application

(including outstanding student loans)

	<u>Applicant</u>	<u>Mother</u>	<u>Father</u>
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....
.....	£.....	£.....	£.....

Please attach a copy or evidence of income or liabilities (eg student loans)

The Trustee's will normally base their decision on the financial information given above.

Summary of Your Family Group

Parent / Guardian

Date of Birth

..... / /

..... / /

Children

..... / /

..... / /

..... / /

..... / /

Please provide details of any disability of the individual and / or any exceptional financial expenditure

.....

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Due to the confidentiality of the above information, this form may be forwarded directly to the Secretary of the Harris Charity at the following address:

*Peter R Metcalf FCA, Secretary, The Harris Charity, c/o Moore and Smalley, Richard House,
9 Winckley Square, Preston, Lancashire, PR1 3HP*