



Office for  
Veterans' Affairs

THE ARMED FORCES  
COVENANT FUND TRUST  
*Funded by HM Government*

# Veterans' Capital Housing Fund



**Major Capital Grants Programme**

**Programme Guidance**

# The Veterans' Capital Housing Fund

## Major Capital Grants Programme

### PROGRAMME GUIDANCE

#### Stage one: Expression of Interest

**Under this programme, the Armed Forces Covenant Fund Trust will award grants of between £75,000 and £500,000 on behalf of the Office of Veterans' Affairs, towards projects that assist in the significant refurbishment, including extensions and new builds, of rental accommodation that will offer high quality support for Veterans with a housing need.**

**We may also consider making awards of between £500k and £1M to exceptional projects if they meet additional criteria.**

Grants will be awarded across four programme rounds. Each round has a two-stage application process – the first stage requiring the completion of an 'Expression of Interest' form.

Expressions of interest for the first round are required by early January 2024. We will contact the proposals that are the best fit under the programme guidance in March 2024 and invite you to make a detailed second-stage application by June 2024 with awards made in September 2024 - or earlier if the applicant chooses the accelerated route.

If you are awarded a grant, you will have two years to complete the project.

**If we invite you to make a full application, we will send you further guidance ahead of the second stage.**

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## Why are we running this programme?

Under this programme, the Armed Forces Covenant Fund Trust (the Trust) will award grants on behalf of the Office for Veterans' Affairs (OVA) towards projects that contribute to the aims of the Government's ambition to reduce Veteran homelessness and end rough sleeping.

This is a major grants programme. It is for capital projects that will support new builds, significant refurbishment, or extension of accommodation for Veterans.

You can apply for this programme if your project will:

- enable major refurbishment of existing social rented or affordable rented homes for Veterans
- enable extensions of existing buildings to increase the availability of Veteran housing
- increase the number of new builds, homes/housing units available to Veterans at affordable or social rents
- ensure properties meet decent homes and energy efficiency standards.

By affordable or social rent, we mean that Veterans on limited incomes can access the housing; and that no Veteran will be paying the local market rent to live within the home or housing unit. If your project proceeds to a full application, we will ask you more about this.

If you are applying for a project in Scotland, you should ensure that your project complies with all applicable building regulations as required by law and in the case of new build must also meet, as a minimum, the design criteria indicated as 'basic' requirement in Housing for Varying Needs (column 'B' in 'Summary of Design Criteria').

If you are applying for a project in Wales, you should ensure that your project will meet the requirements of the Welsh Government Design Quality requirements (WDQR2021) and Welsh Housing Quality Standard (WHQS) which are the standards met by affordable homes.

If you apply a project in Northern Ireland, you will need to comply with all relevant regulations relating to buildings within Northern Ireland.

You can apply for grants between £75k and £500k for new build, significant refurbishments and extensions, for projects lasting up to two years.

We may also consider making awards of between £500k to £1M to exceptional projects if they meet the additional criteria.

This programme will not fund any costs associated with developing the early stages of your building project. We would expect this to have already been completed. This programme would pay for work to start on site. If you are seeking funding of less than £75k, please read the guidance for the [Refurbishment programme](#) to see whether you are eligible to apply. You can find out more about this programme on our website [www.covenantfund.org.uk](http://www.covenantfund.org.uk) Programme to see whether you are eligible to apply. You can find out more about this programme on our website [www.covenantfund.org.uk](http://www.covenantfund.org.uk)

You can apply to help with the costs of refurbishment, new build or extension of accommodation facilities linked to:

- transitional homeless Veteran housing
- accommodation or facilities in Veteran care homes where the provision would be specifically and clearly for Veterans
- accommodation or facilities in long-term, Veteran supported rented housing for Veterans with additional needs such as mobility disabilities which mean that their access to appropriate housing is limited
- social housing.

You can only apply if you are a charity or registered social housing provider (or Registered Social Landlord in Scotland), with at least five years' housing experience. You must also be able to show that the majority of your organisation's work is with Veterans, or that you have significant experience of working with Veterans.

### **This is a two-stage application process.**

At stage one you are submitting an **Expression of Interest (EOI)**, which asks for an overview of your project. If we invite you to submit a full, stage two application, this will be more detailed.

It is likely that this programme will be competitive and that we will receive more requests than we can fund. In later stages of this programme, we may also give priority to requests that have not already received a grant from this programme.

You should read this guidance carefully. It provides you with information on the requirements of this programme as a whole, which may help you to decide whether to apply to this programme.

There is more information on the deadlines for each round in the timetable section of this guidance.

### **About aims and needs**

We want to support projects that need help to refurbish or extend existing accommodation or build new accommodation to house Veterans. This could be transitional or permanent housing. Permanent housing can only include properties that are available to Veterans under a social or affordable rent (as applicable); or are part of a wider facility that provides a rented home to a Veteran with the tailored support that meets their needs. This can include Veteran care homes.

You should show us how your project will meet the aims of this programme. This is to fund stand-alone projects that enable refurbishment, extension or the creation of new affordable homes for Veterans.

It is essential that all projects meet decent homes and energy efficiency standards.

Your Expression of Interest should include information on the following.

- How your project will help to secure accommodation at risk of falling out of use/no longer fit for purpose *and/or*
- How your project will add to existing accommodation units to increase units available *and/or*
- How any planned adaptations will increase availability of either accommodation or communal facilities to Veterans with disabilities or mobility issues.

If we invite you to submit a full application, then you will need to provide more detailed information and evidence.

You need to be able to show us at the Expression of Interest (EOI) stage how a major grant would meet the wider aims of the Veterans' Capital Housing Fund, with a particular focus on:

- transitional/homeless accommodation
- care homes
- supported/sheltered accommodation
- social Housing (or Registered Social Landlord in Scotland).

In your EOI you will need to show us that you have appropriate governance to manage risks effectively, including a comprehensive development appraisal and plan for the proposed work. You will need to provide evidence of these plans if you reach stage two of this process.

A strong EOI will be able to show how the project will contribute to the aims of the Government's ambition to reduce Veteran homelessness and end rough sleeping. You'll need to show who you would work with to deliver the project, and how the benefits of the work would contribute to the overall aims of this programme. If we invite you to submit a second stage application, we will ask you more about this.

You should think carefully about value for money and describe in your EOI why you believe your costs to be reasonable.

You should tell us whether you have used professional advice to help determine the budget or whether the costs are based on experience of running other similar projects.

At the second application stage, we will ask for more detailed information, including design and quality requirements, and evidence on costs and how you plan to work with relevant professionals to deliver your project.

**This is a two stage application process**



Read the programme guidance carefully; and submit your Expression of Interest. This will tell us about the project you would like to carry out; how your project will support veterans and the type of accommodation that you would build if we awarded you a grant.

The Trust will assess all proposals received by the deadline for that round  
The proposals that are the strongest fit with the programme guidance and the aims of the programme will be invited to submit a full application form



You will receive additional guidance if you are invited to submit a full application form. Your application will be more detailed, and will need to include detailed technical information about your plans, costs, delivery timetable and your approach to risk management

The Trust will assess all applications received by the deadline for that round, using the criteria set within the programme guidance. Final decisions on grant awards will be made by the Trustees of the Armed Forces Covenant Fund Trust



If we can award you a grant we will agree a phased milestone payment schedule with you once you have signed your Terms and Conditions of grant.

We will work with you to manage your grant while you deliver your building project.

## What type of project are we looking for?

We are looking for proposals that are clear about the evidence of why their project is needed, and how the impact of the project will continue after the grant has ended.

**Your proposal will need to show that:**

- ✓ **Your project is needed and targeted:** You should be able to clearly explain why you are confident that the refurbishment or extension project is an effective way to support Veterans at risk of homelessness or with a specific housing need.
- ✓ **It was developed with Veterans:** Show us how the idea for your project has been shaped by the people it will benefit.
- ✓ **It does not duplicate and is complementary to existing provision:** Please show us how your project fills a gap in support and explain what other housing for Veterans is available in your project location.
- ✓ **It will support longer-term change:** This means there should be a wider impact to your work, which will endure beyond the life of your grant. Your project should show that it offers a positive benefit to Veterans.

We also need to be able to see that you have the skills and experience necessary to be able to carry out your project. You can work together with other organisations as part of your project. There is more information on working with others later in this guidance.

It is important that the projects we award funding to complement one another, rather than duplicate provision. You'll be asked in your EOI form how you will ensure this and at the second stage be asked to provide relevant evidence of this.

Your EOI should also outline how your organisation effectively delivers your existing services, confirming your organisation's capacity to deliver, and ability to assess and manage risks associated with delivery.

You will also need to describe what evidence of need you have. There is no formal requirement for match funding for a grant for under £500k. You should, however, tell us if you have secured any match funding for your project idea.

## Applying for a grant of more than £500K

You can apply for a grant of £500K - £1M if your project meets the following additional criteria.

- You have demonstrable experience in running existing housing schemes for Veterans and have done so for at least 5 years.
- You have experience in managing building schemes for Veterans housing. This can include significant refurbishment projects.
- You have match funding of at least 30% secured for the whole project. This needs to be in cash, rather than in kind. It must be secured at the time of application rather

than a target to raise at a later date.

- Your project will add substantial additional housing capacity.

### **Example**

A project to develop housing for 23 Veterans will cost £800,000.

The applicant already owns the land and has taken professional advice on building costs and has had comprehensive engagement with the local authority housing and planning departments.

The minimum match funding required will be £240,000. The applicant can apply for a grant of £560,000 and would need to meet all other criteria.

### **Who will benefit?**

Your project will contribute to ensuring that Veterans have access to good quality housing, including housing at affordable or social rents (as applicable), that meets their needs by providing refurbishment or extension of transitional or permanent accommodation.

Priority beneficiaries are:

- single Veterans
- Veterans and their families including Veterans who have shared custody arrangements for their children
- Veterans with disabilities or limiting long term health conditions
- homeless, including rough sleeping Veterans
- female Veterans
- LGBT+ Veterans
- Veterans leaving prison.

### **How much funding can you apply for?**

Under this programme, the Trust will award grants of between £75,000 and £500,000, or, exceptionally, up to £1M.

Any grant that we award under this programme would be in line with our charitable objectives.

The Armed Forces Covenant Fund Trust is a public body. We are required under the Subsidy Control Act 2022's transparency requirements to publish details concerning individual awards which may be considered to be subsidies.

Since the UK left the European Union on 1 January 2021, the UK Government has enacted domestic legislation to replace EU law: the Subsidy Control Act 2022 ('the Act').



The Act aims to control the provision of subsidies – it prevents unfair competition or effects on trade and investment. This might happen if an organisation receives funding from state resources (which includes our funding, as our funds are public money) while another organisation can only use their own private funding.

You should familiarise yourself with the requirements of the new subsidy control regime when considering applying to us.

The Act has been fully in force since 4 January 2023. The Department for Business, and Trade has issued guidance on the operation of the Act. This guidance helps public authorities, such as the Armed Forces Covenant Fund Trust, to award subsidies in a way which minimises any negative effects on competition and investment, as well as promoting the effective and efficient use of public money. These subsidies are permitted provided they satisfy the criteria set out in the Act.

Subsides above a certain financial threshold (currently £100,000) must be published on both our own website, and on a database held by DBT.

This funding must be compliant under the Subsidy Control Act 2022. As such grantees will have their applicant and grant details published on the publicly available Subsidy Database, managed by the Department for Business and Trade. We will expect you to co-operate with our subsidy control assessment process.

You will be expected to comply with the principles of the subsidy control regime and to satisfy any future requirements. Agreements that have been entered into will be reviewed accordingly. We reserve the right to impose further requirements and additional conditions in relation to this matter.

## **Ethics**

Our work supports the Armed Forces Covenant through funding projects that deliver real change to Armed Forces communities. The projects we support need to be carried out to the highest possible ethical standards.

We therefore need to know that you have the skills and experience to work with the groups of people that your project focuses on, can ensure that they are kept safe and that you take an ethical approach to your work.

Our ethical values are Respect, Competence, and Integrity.

We have a Code of Conduct and free online training to explain our approach to ethics. We will ask you to confirm in your application form that you will run your project in line with our Code of Conduct. If your organisation has its own Code of Ethical Conduct, then you will need to explore whether your Code is compatible with ours and tell us about this.

You can access our ethics resources [here](#).

## Assessment criteria

Our criteria are set out below. We will consider each proposal to see how well it meets these criteria and fund those that we believe will best achieve the programme aims.

<b>Difference made - Impact</b>	
What are we looking for?	<p>That the project is contributing to the wider aim of ending Veterans' homelessness by providing affordable and viable homes for Veterans and that your project will</p> <ul style="list-style-type: none"> <li>● Be able to make a significant difference to people's lives.</li> <li>● Be able to show that the grant will have longer term sustainable benefits that will have ongoing legacy after the end of the grant.</li> </ul>
What do you need to show us?	<ul style="list-style-type: none"> <li>● Why there is a need for your planned project.</li> <li>● Why you need help from us to deliver your plans.</li> <li>● How Veterans have shaped this project or service; and how you know that they will use it</li> <li>● How many people this would be likely to help, and what difference this will make.</li> <li>● What the long-term benefits will be?</li> <li>● That you have discussed your plans with the local authority. You should tell us about any evidence that you have if they are supportive of your project idea.</li> </ul>

<b>Delivery of your project</b>	
What are we looking for?	<p>That you have the skills and experience to run your project and that the approach to running your project would be likely to lead to the long-term legacy that you are seeking to have.</p>
What do you need to show us?	<ul style="list-style-type: none"> <li>● That your organisation is well run and well managed</li> <li>● That you'll be able to start your grant activity quickly</li> <li>● That you can keep people on your project safe</li> <li>● That your project will be delivered in line with our ethical values</li> <li>● Why your project offers good value for money Whether you will be working with others to achieve your aims, and how you will do this</li> <li>● How you will measure the impact of your project</li> <li>● That you will be able to complete the project within the two-year timescale of this programme</li> <li>● Your plans to ensure a long-term legacy of your work that will continue after the end of the grant</li> </ul>

## Which organisations are eligible to apply?

To be eligible for this funding, you must be one of the following.

- A registered charity that can show it works with Veterans.
- or*
- A registered social housing provider or Registered Social Landlord in Scotland (we will check the list at the time of assessment) that can show it works with Veterans.

The following additional eligibility requirements also apply:

**Registered charities:** Your organisation must have been registered in the UK (with one or more of the charity commissions for England and Wales, or Scotland or Northern Ireland, and/or Companies House) for at least three years at the time of submission of your EOI and able to provide published accounts for all three years if requested.

**All applicants:** Your organisation must have a minimum of three unrelated trustees (for charities) or directors (for CICs) at the time of applying, and, if successful, throughout the life of your grant, and this must be always verifiable on the relevant charity regulator's or Companies House website.

**The following restrictions will apply.**

- You need to have ownership of the facility or a lease of 10 or more years. If you receive an award, we will request a copy of your lease or land registry title document.
- Applications may be declined from current Trust grant holders if the reporting requirements for existing grants from the Trust are not up to date.
- We are unlikely to award more than one grant per organisation.

## Working with other organisations

You can work with other organisations as part of your project. If any of the organisations that you will be working with will receive part of your grant, then you need to read our guidance below on delivery partners.

A delivery partner is an organisation which is either:

- receiving part of the grant OR
- their involvement in the project, through providing resources or some other means, is critical to the delivery of the project.

### Role of the lead organisation

The organisation that submits the application is the lead organisation. It will have legal responsibility for all funding we award and will be financially accountable for any funds that may be distributed by the lead organisation to delivery partners.

## Delivery partnership agreements

If we award you funding and you plan to work with one or more delivery partners, it will be a term and condition of your grant offer that you have a formal signed partnership agreement with them. If you're successful, the draft delivery partnership agreement must be deemed to be compliant (with our terms and conditions) by us and finalised prior to any funding being released. We may request changes to the draft agreement before it's finalised. You can find guidance on what a [delivery partnership agreement](#) should include on our website.

## Preparing your project budget

### What can funds be spent on?

We can pay for most of the things you'll need for your project.

Your project might include the following costs.

- ✓ Direct building costs relating to your building project.
- ✓ Staff time for this fixed-term project to manage it effectively.
- ✓ Professional fees that are directly related to your building project, such as qualified project managers.

### What can't funds be spent on?

There are several things **we can't pay for**, either because they're not in the spirit of the Fund, or because of relevant legislation or tax rules.

- ✗ Where funding is not benefiting people from the Armed Forces community.
- ✗ Projects that do not clearly meet the aims of the programme.
- ✗ Projects that are building refurbishing/extending buildings that are not for rent to Veterans.
- ✗ The acquisition of land or property.
- ✗ Where money only benefits one person. By this we mean where your whole project would only benefit one person.
- ✗ Making grants or donations of money or items of value to individuals or families.
- ✗ Repeat or regular projects that require a source of uncommitted funding.
- ✗ Endowments (to provide a source of income).
- ✗ Topping up existing grants and aid from a government department.
- ✗ Investments.
- ✗ Fundraising costs, including organising fundraising events and activities.
- ✗ Paying for ongoing costs of existing partnership activity.
- ✗ Projects, activities or services that the state has a legal obligation to provide.
- ✗ Retrospective funding for projects that have already started or taken place.

- ✘ Excessive management or professional fees or contingency costs.

This is not an exhaustive list as we feel it's more useful to focus on what you're trying to achieve and how you're going about this, than to issue long lists of eligible and ineligible costs.

Any grant that we award under this programme would be in line with our charitable objectives. As such, any grant that we award will be for non-economic activities only.

## **What financial information should you include in your Expression of Interest?**

The EOI form will ask you to summarise your project budget, so that we can understand the costs for which you are asking for funding towards. Whilst you can show this in categories (rather than, for example, listing every item of the building work you carry out) we will need to have sufficient information to assure us that you have fully considered how much the work will cost and told us how you know this.

If you we invite you to the second stage of the application process, we will require detailed budgets and project milestones. We will provide more information in second stage guidance documents.

We will expect you to have engaged with relevant professionals and have a clear understanding of the costs that you have included within your budget.

If you are successful, we would expect to see quotes from established contractors prior to any payment being released. For projects requesting funding above £75k we would expect that you will have undertaken a competitive tender process to arrive at the construction cost for your project. We would expect the tender report to have been carried out within the last six months.

We would also expect to see appropriate contingency in your budget, which will help should your project costs rise or if the project is delayed. Please note contingency costs would only be paid if the project costs increase or the project is delayed.

You should ensure that you have a financial plan for the duration of the project as we will not pay for construction work in advance of it being undertaken, instead we release our grant towards the costs incurred by you during the project and these must be evidenced by invoices and or certificates.

If you are successful and we award you a grant for a construction project, the Trust will inspect the work being undertaken at various stages and in particular when work is complete.

## Timetable

### Round One

If you submit an Expression of Interest before **5pm on 3 January 2024**, you will be notified about the outcome of your EOI before the end of February 2024. The outcome will either be an invitation to submit a full, second stage application, or a rejection. If your EOI is rejected, you can apply under subsequent rounds.

If you are invited to submit a full application, you can choose to submit this by **5pm on 3rd May 2024** for a decision by the end of July, or by **5pm on the 3rd of June 2024** and you will receive a decision by the end of September 2024.

### Round Two

If you submit an Expression of Interest before **5pm on 17th of June 2024**, you will be notified about the outcome of your EOI before the end of September 2024. The outcome will either be an invitation to submit a full, second stage application, or a rejection. If your EOI is rejected, you can apply under subsequent rounds.

If you are invited to submit a full application to Round Two, this will need to be submitted by **5pm on the 9th of December 2024** and you will receive a decision by the end of March 2025.

### Round Three

If you submit an Expression of Interest before **5pm on 3 January 2025** you will be notified about the outcome of your EOI before the end of March 2025. The outcome will either be an invitation to submit a full, second stage application, or a rejection. If your EOI is rejected, you can apply under the final round.

If you are invited to submit a full application, this will need to be submitted by **5pm on the 2nd of June 2025** and you will receive a decision by the end of September 2025.

### Round Four

If you submit an Expression of Interest before **5pm on 16 June 2025**, you will be notified about the outcome of your EOI before the end of September 2025. The outcome will either be an invitation to submit a full, second stage application, or a rejection. **If your EOI is rejected, you will not be able to apply again.**

If you are invited to submit a full application, this will need to be submitted by **5pm on the 8th of December 2025** and you will receive a decision by the end of March 2026.

<b>Round One</b>	<p>Expression of Interest submitted by 3 Jan 2024</p> <p>Expression of Interest decision by end February 2024</p> <p>Full application submitted by either:</p> <ul style="list-style-type: none"> <li>• 3 May 2024, for a final decision by end July, OR</li> <li>• 3 June 2024, for a final decision by end September</li> </ul>
<b>Round Two</b>	<p>Expression of Interest submitted by 17 June 2024</p> <p>Expression of Interest decision by end Sept 2024</p> <p>Full application submitted by 9 Dec 2024</p> <p>Final decision by end March 2025</p>
<b>Round Three</b>	<p>Expression of Interest submitted by 3 Jan 2025</p> <p>Expression of Interest decision by end March 2025</p> <p>Full application submitted by 2 June 2025</p> <p>Final decision by end Sept 2025</p>
<b>Round Four</b>	<p>Expression of Interest submitted by 16 June 2025</p> <p>Expression of Interest decision by end Sept 2025</p> <p>Full application submitted by 8 Dec 2025</p> <p>Final decision by end March 2026</p>

**NOTE: All projects we fund under this programme must be completed within two years from the date of award.**

We cannot accept any late applications.

We highly recommend you plan to submit your EOIs/applications before the deadlines to avoid the risk of missing the cut-off because of technological or other unexpected problems.

**Dates for Round 2 and subsequent rounds are provisional, please check the Trust's website for any updates.**

## How to apply – the Expression of Interest form

You need to apply using our online application form which you can access [through this link](#).

If you don't yet have an account for our online application portal, then you will need to create one. (You will need this anyway if you are successful in receiving a grant, so that you can submit reports and receive grant payments). On our system, you can save a draft application form to complete later or send a draft copy to colleagues. You can also access copies of the application that you've submitted at any time.

We strongly recommend that you complete your EOI in a Word document, save it locally as you work on it and when it is complete you then cut and paste the answers into the online form. You will find a Word document with a list of the project related questions on our website. Please don't use any formatting, such as tables or numbered lists, in your Word document, as the online form may not accept this formatting and you might have trouble submitting the form.

When you are entering data onto the online form, we suggest you save your form every 10-15 minutes whilst you are completing it, to avoid the risk of it 'timing out'.

You will be emailed when you both save and when you submit the form, please be aware of this when completing the EOI. We can only consider applications that have been fully submitted. Please check the "Submitted Applications" tab on your grant portal, to ensure the form has been fully submitted.

It's important that we can contact your organisation, particularly, of course, if you receive a grant. You will need to provide two contacts from your organisation on the application. At least one of these should have an email address that belongs to your organisation. At least one contact must hold the relevant authority (CEO/ CO or equivalent) to authorise any grant contract and bank account to be used should you be successful. The main contact must have an email address that belongs to your organisation. If this is not provided, your application may be considered ineligible.

Please think carefully about who these should be, as they will need to be able to sign acceptance of the grant and use of the bank account on the Offer Letter/ Terms and Conditions if your application is successful. If either contact changes, do let us know as soon as you can.

Do check that you have fully answered all the questions because, if not, we might not be able to consider your application.

Do not send your EOI by email or post to the Covenant Fund Trust – only applications submitted via the online form can be considered.

You must also make sure that the Trustees/Directors/ senior staff within your organisation know that you are submitting this EOI.



## **After you submit your application form**

You will get an automated email to confirm that your EOI has been submitted. This email will come from an address called [mailuk@grantapplication.com](mailto:mailuk@grantapplication.com). You may wish to add this email to a safe senders list on your email system to ensure that it can come through to you.

**If you have not received this email, then your EOI was not submitted successfully. Please log back into the portal to submit it.**

We will check your EOI to ensure that you've provided all the information we have requested. We may contact you during our assessment if there are any issues, we are unclear about – please do not assume any contact or lack of contact is an indication of your likelihood of being successful or declined.

We will review the information you provide in your EOI and, where relevant, data and information from the Charity Commission, Companies House or other regulators' websites relating to your constitution and recent audited accounts. We may also look at other publicly available sources such as your organisation's website and social media activity.

After submitting your EOI, you must advise the Trust of any significant changes in your organisation, its governance or finances which might impact on our consideration of your application.

We will assess your EOI against the key criteria of the programme.

## **Checks we may carry out on your organisation**

We may carry out several checks on the information you provide us with and about your organisation. This is to make sure that the information is correct and there are no significant risks we can identify when awarding grants.

These may include checks:

- on whether financial information on your application form matches that held by your regulatory body (Companies House, Charity Commission etc.)
- that we can see that you have a minimum of three unrelated Directors or Trustees listed on your regulator's website.
- that your governing documents (such as constitutions and memorandum and articles of association) are up to date, correct and properly signed
- on your accounts that are accessible through regulatory bodies
- on any identified concerns about a person named as a contact or who has a position within your organisation
- that the signatories are valid and well informed about the project
- on your annual report and on your website/social media activity that your organisation is undertaking the activities as described in your application.
- to ensure you are up to date on all reporting with any active grants you hold with the Trust.
- if your organisation is a branch of a larger organisation (such as charities with regional branches or offices), as part of our due diligence checks we may be sharing key details of the application with your head office to confirm eligibility to apply for this funding.

- if you are awarded a grant, that your organisational name and address on your bank statement are consistent with the details you've provided in any completed form or the information that's held elsewhere in the public domain.
- if you are awarded a grant, that your bank statement shows that your account is being managed in line with your own financial procedures and our programme requirements.

We may ask you to send us additional information or answer specific questions about your organisation. If we ask you to do this, you'll need to send us this information within five working days.

## **Decisions and what happens next**

The Board of Trustees will review the EOIs and make final decisions using balancing criteria in addition to the key criteria. The balancing criteria include the relative strength and value for money of the project when viewed as part of a national portfolio of projects.

Funds are limited. Therefore, the Board will use their discretion to choose which proposals to take forward to the second stage, ensuring a good spread of potentially funded projects and to differentiate between projects that are considered fundable.

Please note that to minimise the risk to public funds the Trust may prioritise considering funding those applicants which have good track records on reporting to regulators, demonstrate transparent and appropriate governance arrangements and have comprehensive published accounts. For organisations which previously had grants from us, we expect all reporting on these grants to be up-to-date and may consider this when considering new applications.

Trustees may also take the decision to part-fund proposals. This may mean we invite you to apply at the second stage for less money than you applied for. If this is the case, we will talk to you about what elements of the project were supported and why and discuss this with you.

After the Trustees have met, we will send an email to you using the primary contact email address you provided in your EOI. This will tell you whether you have been selected to submit a full second stage application.

Our programmes are often oversubscribed and, unfortunately, we often have to turn good applications down due to lack of available funding. If you have been unsuccessful, we will email you to tell you.

## **For information, should you be successful after the second stage of this application process: what happens next if we award you a grant?**

If we plan to fund your project, you'll need to accept our grant offer and the terms & conditions of the grant **within four weeks of receiving the Offer Letter** or risk the offer lapsing.

Our [terms and conditions of grant](#) can be accessed on our website. If we offer you a grant, you will need to confirm that you will follow these terms and conditions of grant before we can release any of your grant to you.

We will email you in the first instance to advise you that you have been successful. This email will give you full instructions of what you need to do next to receive your official offer letter, how to accept the grant and what documents you need to provide.

If we offer you a grant, we may invite you to come to a briefing session for new grant holders; and we'll send you the dates for these. We will hold the briefing online and explain the next stages of your grant. Alternatively, we may request a virtual meeting with you to provide you with further information and answer any questions you may have.

We will send your formal Offer Letter and Terms and Conditions to you after the briefing or meeting. We won't be able to pay your grant until you've signed these documents.

Once we have all the necessary documents back, we will pay the first instalment of your grant. If there are any discrepancies/queries within these documents, this will delay your payment, so please read the accompanying information we provide, thoroughly. We will pay your grant in instalments, and the number and size of these will depend on the size and duration of the grant. A small proportion of the total amount awarded will be retained pending a satisfactory End of Grant report.

If you receive a grant, you will need to keep good records of how you spent the funds and how many people you helped and how. As part of the Terms and Conditions of funding we will ask you to update us on the progress of the project, this will include detailing how you have spent the funding.

We may also expect you to take part in evaluations, impact studies or other research related to the funding you have received. We will let you know what is required and how to participate.

The Trust has a Privacy Policy which explains what data we collect from our grant applicants, and how we use this. Please read this in advance of applying:

<https://covenantfund.org.uk/privacy-policy/>

If you have any questions relating to this programme, please look at the programme information that we have on our website.

Following this, if you still have queries and cannot find the answer in these guidance notes, please email [info@covenantfund.org.uk](mailto:info@covenantfund.org.uk)