



**Funded Partner Programme  
Information Pack**

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## Gloucestershire Funders

This pack contains information about Barnwood Trust's **Funded Partner Programme**, to support a wide range of activity being delivered in Gloucestershire that meets our vision and goals.



**Please note that organisations cannot currently make an application directly to Barnwood Trust.**

Applications for Barnwood Trust to consider are made via Gloucestershire Funders, a collective of funder and local authority representatives which meets fortnightly to consider Expressions of Interest. To make an application to us, you must first submit a short Expression of Interest through the Gloucestershire Funders website. Visit [www.glosfunders.org.uk](http://www.glosfunders.org.uk) to find out more.

At a Gloucestershire Funders meeting, Barnwood Trust will decide whether your proposal and/or organisation or group fits within our eligibility criteria. If it does, a member of the team will be in touch with you to discuss making a full application.

**This information pack covers everything you need to know about the application process to Barnwood Trust, and the ongoing relationship with us following a funding award.**



# About Barnwood Trust

## Overview

The Trust acts as an agent of social change, working alongside disabled people and people with mental health conditions to create that change. Our goals are delivered through a programme of listening and learning, funding and influencing.

## Vision and goals

Gloucestershire will be a better place when disabled people and people with mental health conditions are equal, empowered and their rights are upheld.

Barnwood's strategic goals are that disabled people and people with mental health conditions:

- **have choice of opportunities to meet their hopes and passions**
- **are included and involved in their communities and the places where they live**
- **access their rights and see positive change on disability issues**

## Values

All the Trust's work is guided by four values: **Focused**, **Inclusive**, **Bold** and **Forward Thinking**. For more details, please [click here](#).

## Funding Principles

Our application and decision-making processes are delivered in line with our funding principles. For more information on our funding principles please [click here](#).

# Funded Partner Programme

## Barnwood Trust's Enhanced Funding

**Between 2023 and early 2026, Barnwood Trust has additional funds available for organisations and groups in the county. This pack outlines how the Trust will distribute this additional funding.**

It is important to note that the Trust may decide not to award multi-year funding beyond early 2026, and therefore applicants should not expect further long-term funding beyond this period.

The Trust is committed to working alongside our funded organisations during this period to plan for the future, and consider how to become sustainable when the Trust has fewer funds to distribute.

## Introduction

**Our funding is open to organisations and groups who work alongside, create opportunities for, and are passionate about creating positive change for disabled people and people with mental health conditions throughout Gloucestershire.**

Barnwood Trust is a social change agent working towards long-term, positive outcomes for disabled people and people with mental health conditions in Gloucestershire. We know that learning what works and sharing this learning beyond the Trust is a major tool for driving social change and as such, we fund organisations and work which will support us to learn how best to make this change a reality.

The Trust can only fund work that intentionally advances our mission that Gloucestershire will be a better place when disabled people and people with mental health conditions are equal, empowered and their rights are upheld. As such, all applicants will be asked to outline how their proposal supports the realisation of the Trust's [vision and strategic goals](#) (see page 2).

## What can you apply for?

The amount that your organisation can apply for, as well as the type of funding you may receive, will depend on several factors. The Funded Partner Programme contains three categories under which it awards funding to organisations and groups:



- **Unrestricted Funding**
- **Project Funding**
- **Small Grants Funding**

	Unrestricted Funding	Project Funding	Small Grants Funding
Who is eligible	Open to charitable and community organisations delivering work in Gloucestershire <b>whose governing document or charitable objects show an explicit commitment to disability and/or mental health outcomes</b> ( <a href="#">click here to view our vision and strategic goals</a> )	Open to charitable and community organisations delivering work in Gloucestershire whose governing document or charitable objects do not show an explicit commitment to disability and/or mental health outcomes, <b>but would like to do work that aligns with Barnwood's strategic goals</b> ( <a href="#">click here to view our vision and strategic goals</a> )	Open to newly constituted and non-constituted groups, as well as established organisations and groups <b>that would like to do work in Gloucestershire that supports Barnwood's vision</b> ( <a href="#">click here to view our vision and strategic goals</a> )
Funding term	You can apply for multi-year funding for up to 3 years	You can apply for multi-year funding for up to 3 years	Funding must be spent in 1 year or less
Amount	You can apply for up to £150,000, or the equivalent of £50,000 per year if less than 3 years	You can apply for funding of between £10,000 and up to £100,000, or the equivalent of £33,000 per year if less than 3 years	You can apply for up to £10,000
What you can spend it on	Funding can be spent on anything within the organisation's charitable objects	Funding can be spent on anything that delivers the proposed work, including project staff salaries, evaluation costs, and associated overheads	Funding can be spent on anything that delivers the proposed work, including project staff salaries, evaluation costs, and associated overheads. Funding can cover holidays, events, equipment, short-term or one-off projects
Other Barnwood funding	Organisations cannot apply for another grant from Barnwood Trust during this funding period*	Organisations cannot apply for further funding from Barnwood Trust during this funding period*	Organisations can only apply once in a 12-month period, and cannot receive further funding from Barnwood Trust until any live funding comes to an end*

\*Barnwood Trust periodically runs one-off, themed funding rounds, which may be open to current grant recipients. These funding rounds are separate to this programme, and details are published on Barnwood's website when they launch.

If you would like to do a preliminary check of which category your organisation or group is eligible for, please visit our eligibility checker.

## **What will Barnwood Trust not fund?**

There are certain things that Barnwood Trust cannot fund through this programme. This includes:

- ✗ organisations without an asset lock or other general mechanism used to cover all the provisions designed to ensure that the assets of an organisation, including profits or surpluses generated, are used for charitable purposes
- ✗ building adaptations and new building projects\*
- ✗ independent education – by this, we mean work which takes place or is delivered by fee-paying schools
- ✗ work that is not legally charitable
- ✗ grants to individuals
- ✗ work, activities or equipment that are a statutory responsibility
- ✗ international appeals
- ✗ medical procedures or practice
- ✗ work that does not have a direct benefit in the county of Gloucestershire\*\*



\* For Unrestricted Funding, the funding can be spent on routine building repairs and maintenance where needed. However, Barnwood Trust cannot fund the construction of new buildings, extensions, or significant refurbishments under any of the strands outlined in this pack. If you are unsure or have questions, or if your request is about improving access, please speak to your Funding Relationship Manager (FRM).

\*\* If you are a national organisation, or if you are based in a nearby or neighbouring county, you may still apply for funding if you meet our eligibility criteria. However, in all categories, approved funding must be linked to specific work you are delivering in Gloucestershire. Barnwood Trust cannot contribute to the cost of activity outside of the county.

## The application process

Once Barnwood Trust has read your Expression of Interest, and believes you are eligible to apply to one of the funding categories outlined above, you will be assigned a Funding Relationship Manager (FRM). They will be in touch to discuss which funding category your organisation or group is eligible for, and guide you through submitting a full application.

Your assigned FRM will not be involved in the scoring process once you have submitted an application. Their role is to ensure you have all the information you need to make an application successfully, and to answer any queries about the application process, the assessment criteria, what happens once a grant has been awarded, or about the Trust itself.

### Getting started: the due diligence assessment

Once you have been assigned a FRM, the next step will be a due diligence assessment, carried out by the Trust.



This is not a part of assessing the quality of your application, but is an opportunity to determine an organisation's suitability to receive funding from Barnwood Trust. We carry out this check first to ensure that your organisation is eligible, and to prevent you from writing a full application before you know this to be the case.

The level of assessment we carry out will depend on the type of funding you are asking for. Your FRM will clarify for you what documents we need to see when they get in touch with you.

For **Small Grants Funding** we will need to be satisfied that:

- you have a satisfactory safeguarding policy and accompanying procedures
- your organisation or group has a bank account, and can provide a copy of a recent statement

For the two larger grant categories (**Project** and **Unrestricted Funding**), in addition to the above items we will also need to see:

- a copy of your governing document, if you are not a charity, or your charitable objects if this is not provided on the Charity Commission website.
- a copy of your two most recent annual accounts: If your most recent published accounts are more than 6 months old, we will ask to see recent management accounts that illustrate your current financial position.
  - *Note: if the amount you are applying for from Barnwood each year is more than 50% of your previous year's organisational income, we may not be able to award the full amount you have applied for, unless your application outlines a robust plan for scaling up the work you do in a short timeframe. We will be in touch to discuss this with you if this is the case.*
- your reserves policy, so that we can check that the level of free reserves your organisation holds is within your current policy. If your organisation holds higher free reserves than your policy states, we will be in touch to discuss the reasons for this. We check this to understand whether your organisation already has the funds to do the work you are applying to do.
  - *Note: if you don't have a reserves policy, we will calculate your free reserves by combining your unrestricted and undesignated reserves, and subtracting the value of your fixed assets.*

If your organisation is a Community Interest Company (CIC), and is applying for **Unrestricted** or **Project Funding**, the Trust will require:

- evidence that you have a minimum of three directors, who are not related to each other
- information on your organisation's income streams that are not grant funding

We will also do our own checks on Companies House and the Charity Commission website.

Due diligence assessments are carried out by the Trust's Funding Policy and Evaluation Manager. If we require any further clarification on any information you have provided, have any concerns, or are unable to complete a due diligence check, the Funding Policy and Evaluation Manager will be in touch to discuss this with you.

## **1 Writing your application, and assessment criteria**



Once your due diligence assessment is complete, your FRM will notify you of this and schedule an application support meeting.

At this meeting, they will introduce the application process, and ensure you have the support you need to complete your form. If you cannot find a suitable time to meet, your FRM will send you the materials you need to begin putting together your application, and will be on hand to support if you need further guidance.

There is a different application form for each category. At your application support meeting, your FRM will introduce the application questions, and guide you through what assessors are looking for. The full set of questions and assessment criteria are published online and available to read at any time; simply [click here](#).

Each FRM manages a portfolio of grants, and as such there will be a limit to the number of application support meetings they can provide for each applicant. However, they will be available on email and on Teams should you have a query or concern about your application, and they will get back to you as soon as possible.

Your FRM cannot write your application for you, nor can they make any guarantees about whether your proposal will be funded. Their role is to help you ensure your application has addressed the key assessment criteria, and to guide you through the various steps.

You will notice that our application form is provided for you as a Word document. We understand that there could be multiple people feeding into the application process and hope that this will allow for ease and flexibility, rather than requiring you to complete an online form.

Your FRM will support you with any questions you may have about filling in the application form. If this is not an accessible format for you, your FRM will work with you to agree a way to submit your application that works for you and your colleagues.

## 2 Submitting your application

When you are finished with your application, you should send this to your FRM by email. They will read it and double-check that you have addressed the assessment criteria in your response.



They will not be able to provide advice on the quality of your proposal itself, but instead they will check that you have covered the main criteria in your answers, and may advise if they believe you need to give more information.

Once you are happy with your application, please submit the form to your FRM by email. Upon receipt, your FRM will review the application to ensure all sections have been completed before submitting the application to Barnwood Trust's internal panel for assessment. Your FRM will confirm the process from this point with you once your application has been submitted.



### 3 How Barnwood Trust makes funding decisions



Each funding category has a slightly different decision-making process and timeline. These are outlined in brief below. In all cases your FRM will communicate timelines with you, to ensure that your plans align with the timing of our decision-making process.

Although we aim to make decisions within the timescales published below, there will be times when our funding is busier than usual, or where exceptional circumstances mean that meetings do not take place as planned. Your FRM will stay in contact with you, and let you know if there is likely to be any delay.

#### **The Internal Funding Panel**

Members of the Internal Funding Panel will have had no prior knowledge of your application. As a funder with a small geographical remit, we want to ensure that every organisation and group applying for multi-year funding has a fair chance of being funded, and is not open to scrutiny based on prior interaction with the Trust or individuals linked to it. For this reason, once submitted, all Unrestricted and Project Funding applications will be anonymised. This means that any identifying details of your organisation and its partners will be redacted before assessors have the opportunity to read your application.

### Unrestricted Funding (decisions every three months)

- Assessed monthly by an internal panel made up of staff members from across Barnwood Trust. Your application will be anonymised
- Assessors will not have been involved in your application
- Each application is scored by all panel members against the [published criteria](#)
- Applications for more than £30,000 will then be brought to our Funding Committee for review. The Funding Committee is a sub-committee of Barnwood Trust's Board, made up of Trustees, and representatives of the VCS and statutory sectors. This group meets quarterly (every three months)
- Applications for more than £100,000 will then be brought to Barnwood Trust's Board for ratification. The Board meets approximately 2 weeks after the Funding Committee
- If the panel, Committee or Board has questions before awarding the grant, your FRM will be in contact to discuss this
- Outcomes will be shared as soon as possible following the Board meeting
- Any declined applications will be offered feedback and communicated to you by your FRM

### **Project Funding (decisions every three months)**

- Assessed monthly by an internal panel made up of staff members from across Barnwood Trust. Your application will be anonymised
- Assessors will not have been involved in your application
- Each application is scored by all panel members against the [published criteria](#)
- Applications for more than £30,000 will then be brought to our Funding Committee for review. The Funding Committee is a sub-committee of Barnwood Trust's Board, made up of Trustees, and representatives of the VCS and statutory sectors. This group meets quarterly (every three months)
- If the panel or the Committee has questions before awarding the grant, your FRM will be in contact to discuss this
- Outcomes will be shared as soon as possible following the Funding Committee meeting
- Any declined applications will be offered feedback from the panel, and communicated to you by your FRM

## Small Grants Funding (monthly decisions)

- Assessed internally by Barnwood Trust's Funding Team at a fortnightly Small Grants Funding Panel Meeting. Applications will not be anonymised, as Funding Team members will see applications submitted through our internal database
- Assessors will not have been involved in your application
- Each application will be assessed by 2 Funding Team members and scored against the [published criteria](#)
- Outcomes will be shared within a month of the application being submitted
- If assessors have questions before awarding the grant, your FRM will be in contact to discuss this
- Any declined applications will be offered feedback from the panel, and communicated to you by your FRM

## Important information about this process

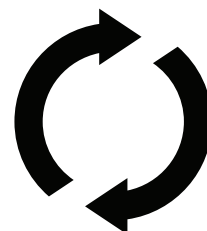
### Your budget

If applying for multi-year funding, we ask that applicants apply a projected increase to costs for subsequent years to account for inflation. The Trust will not be able to apply inflationary increases to grants, so we ask that applicants plan ahead for this, within the limits of the category of funding you are applying to.



## Re-applying after an unsuccessful application

Your FRM will explain to you the reasons why your application has been declined. Although there is no restriction on the number of times that you can re-apply to Gloucestershire Funders, the likelihood of future success will depend on the nature of 1) the reason for the declined application by Barnwood Trust, and 2) whether you have acted on the feedback you received from the earlier application. If you would like further guidance on this please speak to your FRM.



## Appeals

There is not an appeals process for this funding, unless you have reason to believe that the Trust did not follow the published process when making its decision. If you believe this to be the case, please contact Eibhlish Fleming, Head of Funding and Social Investment by emailing [eibhlish.fleming@barnwoodtrust.org](mailto:eibhlish.fleming@barnwoodtrust.org) and she will investigate this.



**Please note that submitting a full application to Barnwood Trust does not guarantee funding.** You will, however, have the best possible chance to submit a successful application if you take up the offer of support from your FRM, and stick closely to the published assessment criteria and guidance when completing your application.



## Payment

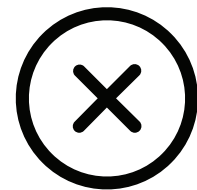
In all scenarios, we will issue terms and conditions for you to sign within a fortnight of an outcome. Once you have signed this, we aim to release funds within a fortnight. If there is a delay for any reason, your FRM will be in touch to communicate this.



## Closure of this funding programme

The Trust has an annual budget, and as such it may pause accepting Expressions of Interest from Gloucestershire Funders if the budget is likely to be exceeded before the end of the year. Barnwood Trust will ensure this is shared on the Gloucestershire Funders website if this is the case.

This will not impact any applications that have already begun, and applications will still be processed in a timely manner, and as outlined in this pack.



## Once funding has been awarded

We refer to funded organisations as **Funded Partners**. This recognises the vital role that funded organisations in the county play in making Gloucestershire a better place for disabled people and people with mental health conditions. This title demonstrates the importance we place on learning from and with the organisations and groups that we fund.

### 1 Setting up your grant

If your application is successful, your FRM will inform you of this, and send you a Terms and Conditions document.



Your FRM will schedule a Grant Set-up Meeting to discuss the Terms and Conditions document, and to agree some key details. This meeting can take place in person or on Teams.

This meeting will cover:

- your payment schedule (if multi-year)
- the learning aims you identified, and how you will share progress against these with the Trust
- a schedule for catch-ups over the course of the funding
- any additional or exceptional terms that the relevant funding panel has stipulated. (These will always be proportionate, and the Trust will never require you to commit to work that you have not applied to do)

Once you have signed your Terms and Conditions document, your grant, or if multi-year, your first instalment, will be paid within 2 weeks.

From this point your FRM will continue to be your point of contact at Barnwood Trust, and the nature of your relationship with them will evolve into a learning one. We want your ongoing interactions with the Trust over the life of your grant to be beneficial and valuable, and so our approach to funding relationships will be guided by your capacity to work with us to share your learning.

## 2 Monitoring, evaluation and learning

As a social change agent, Barnwood Trust takes an active interest in the work that we fund, in a bid to learn about best practice across the county.



To support this, your FRM will agree a periodic catch-up schedule with you. At catch-ups you can discuss challenges, successes, or any reasonable support beyond funding that you would like the Trust to provide.

These catch-ups are not so that we can check up on your organisation or project. Barnwood strongly believes that the organisations and groups that we fund are the experts in their field, and so these meetings will be a chance to learn alongside you. We will also commit to sharing your learning with other funded organisations in our portfolio.

On your application form, you will have identified up to three learning topics. These are the areas that we will ask you to reflect on at your catch-ups. If your interest in these topics evolves, or if you decide to focus on a different theme or topic at some point in your funding, speak to your FRM. We are committed to being flexible.

The type of monitoring, evaluation and learning relationship you have with your FRM will be directly proportionate to both the size of grant you receive and the type of work you are doing. As a guide, we anticipate the following requirements for funding relationships in each category:

### **Unrestricted Funding**

- Following a Grant Set-up Meeting, a regular, short catch-up with your FRM; depending on the type of project, a minimum of quarterly
- A short monitoring form completed annually with your FRM, sharing thoughts on your learning topics, any key impact data, and some headlines about your organisation's plan for the coming year
- Your annual monitoring form will, once approved, trigger the release of the coming year's funding

### **Project Funding**

- Following a Grant Set-up Meeting, a regular, short catch-up with your FRM; depending on the type of project, a minimum of every 6 months
- A short monitoring form completed annually with your FRM, sharing thoughts on your learning topics, any key impact data, and any changes or updates to your plan for the project in the coming year
- Your annual monitoring form will, once approved, trigger the release of the coming year's funding

### **Small Grants Funding**

- Following a Grant Set-up Meeting, at least one catch-up with your FRM, at a minimum when you have completed the work you want funded
- A short monitoring form on completion of the grant, outlining some key data and an opportunity to share any challenges, successes, and learning

**We want Funded Partners to share with us whatever you would like to – the good, the challenging, and all things in between – safe in the knowledge that we understand and expect that some things will not go as planned. We believe that trial and error is an important part of social change, and honest conversations about challenges lead to the most useful learning.**

### **3 Learning sessions**

Although your FRM will listen to your learning and share it with Trust colleagues and with organisations doing similar work, the Trust also has a role to play in convening around our various learning themes, and catalysing discussion about practice, policy, and provision.



The Trust will work with Funded Partners to identify themes, issues, challenges, and practices that could benefit from group discussion, and will invite organisations to contribute and participate in these sessions. Your FRM will provide more information on these over the course of your funding relationship with us.

## **Contact us**

If you have any questions about this process, or would like to discuss an application with us please email [orgfunding@barnwoodtrust.org](mailto:orgfunding@barnwoodtrust.org) and a member of the FRM team will get back to you as soon as possible.