

# Community Climate Grants

*Towards Zero Carbon Cumbria*



## **A Zero Carbon Cumbria Community Climate Grants**

### **Guidance for Applicants**



**November 2021**



## Contents

1. <u>Background and objectives of the fund</u>	1
2. <u>Eligibility</u>	3
- <u>Qualifying organisations</u>	3
- <u>Qualifying projects/activities</u>	4
- <u>What we will fund</u>	5
3. <u>Overview of the application processes</u>	7
4. <u>Guidance on the application forms</u>	11
5. <u>Terms and conditions of funding</u>	13
 Appendices:	
1. <u>Template constitution</u>	16
2. <u>Template delivery plan</u>	18
3. <u>Template budget breakdown</u>	19
4. <u>Reporting template</u>	20
5. <u>Advice and assistance</u>	24

# **1 Background and objectives of the fund**

The Zero Carbon Cumbria Partnership brings together over 70 organisations in the public, private, and charity sectors with the aim of reducing the county's greenhouse gas emissions, and also making Cumbria carbon neutral by 2037.

CAfS has been awarded £2.5 million from the National Lottery's Climate Action Fund, on behalf of the ZCCP, for a five-year Zero Carbon Cumbria project. This project will tackle some of the main sources of carbon emissions in Cumbria, with a particular focus on food, energy generation and the goods we buy.

This £100,000 grant fund is a key element of our project. Its main objectives are to support climate action by grassroots community groups and to help local sustainability groups get established and develop.

The fund will operate in a similar way to the National Lottery's Awards for All fund. It will also be shaped by community groups to ensure that it meets their needs and that there is a strong community voice in the way that it is delivered.

## ***1.1 Key principles***

The fund will operate on the following principles:

- Transparency and fairness.
- Simple and straight-forward for applicants.
- Efficient processing of applications and decision making.
- Priorities for the fund and the approach to decision making for larger awards based on the principles of participatory budgeting to optimise community involvement.
- Robust governance, policies and procedures to ensure legal compliance, financial integrity and compliance with the Lottery's terms and conditions.
- Value for money both as part of the decision making process and by ensuring efficient administration.

We will engage with community groups across Cumbria to set specific objectives for the fund within Zero Carbon Cumbria Partnership's objectives of:

- Broadening engagement.
- Deepening engagement.
- Empowering communities and citizens to take action which will reduce emissions.
- Building capability and capacity within grassroots sustainability organisations.

The fund will operate as follows:

- Small scale awards - up to £750 (e.g. film licenses, venue costs, speaker travel, PA system hire, banners, posters, pop ups, leaflets). This will operate on a rolling process. In most cases applicants will be given an immediate indicative response. There will be a maximum 10 working day turnaround for confirmation.
- Medium (£750 - £2000) (e.g. employing part time staff to help with a specific project or for a feasibility study). Maximum one month turnaround for a decision.
- Large awards – we will award a small number of grants of up to £10k for projects that need staffing or other costs covered and that cannot secure this from other sources. To enable value of fund to be spread over the lifetime of the project, a series of application rounds will be held in 2022, 2023 and possibly in 2024. The decision making process will be based on the principles of participatory budgeting as determined by the steering group.

Wherever possible grant funding will be paid to the group in advance, and they will then complete and return a monitoring report to confirm what the money was spent on and what outputs and outcomes were achieved.

If groups are at an early stage of development and do not have a bank account, or a local partner with which they can make a joint application, then CAfS would consider administering the grant but this will only apply to small and medium grants.

We have established a steering group to set priorities for the fund. The steering group also has oversight of the allocation of funding and responsibility for the decision making processes.

## 2 Eligibility

To qualify for financial support, an eligible organisation must submit a project which meets the objectives of the fund.

### 2.1 Qualifying organisations

Eligible organisations must:

- Have a clear zero carbon, emissions reduction, environmental or sustainability objective. Such objectives could be contained within the organisation's constitution, in its vision/mission statement, in an environmental policy, as an objective on its website or as a key objective in its strategy/workplan.
- A community organisation such as:
  - Constituted group or club – i.e. an organisation with a governing document such as a constitution or a set of rules and a committee but not a registered charity or a company.
  - Registered charity
  - Charitable incorporated organisation (CIO)
  - A company limited by guarantee
  - Community interest company (CIC)

NB: Grants cannot be made to groups which don't have a constitution or to individuals. A template constitution is provided in Appendix 1. Advice and support is also available from [Cumbria CVS](#)<sup>1</sup>

- Be based in Cumbria and locally controlled– e.g. a majority of the committee members/trustees must be from the local community within Cumbria. If local branches of national organisations do not have a separate constitution, they are invited to explain how they control local activities, for example through a separate committee, separate bank account, separate ring-fenced budget, and with workers / volunteers and a project venue based in Cumbria.

If an organisation does not meet these criteria, it could potentially be a partner in an application submitted by eligible organisation, i.e. by collaborating with a local sustainability group. In such a case, a written partnership agreement should be signed by both parties.

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<sup>1</sup> <https://cumbriacvs.org.uk/development/>

## **2.2 Qualifying projects/activities**

Projects must be able to demonstrate that they will contribute to at least one of the following objectives for the fund:

### *Delivery projects:*

Activities which will **reduce carbon emissions including those relating to energy use, food, buying things and/or travel**. As examples:

- A feasibility study into local opportunities for community energy.
- Provision of advice to householders on minimising food waste.
- A project to promote active travel (walking, cycling)

Activities which will **engage more people and/or build knowledge and understanding of climate change within your community**. As examples:

- An event to help generate interest in climate change amongst the local community and the actions they can take, targeted at groups or individuals who have not been particularly engaged on environmental issues so far.
- Provision of in-depth advice on low carbon behaviours to householders in a local community
- A project focussed on engaging young people in an innovative and interactive way

Activities which will **link with other projects or activities which will help achieve our target of a Zero Carbon Cumbria by 2037**. As an example, a project which helped to take forward the recommendations from a local citizens' jury or a project which was linked to the Grow Local, Eat Local project, which is also being delivered as part of the Lottery-funded Zero Carbon Cumbria project.

### *Development projects*

Projects which help community sustainability organisations **develop skills and knowledge and/or build capacity**. Such projects could cover a group's ability to deliver emission reduction projects; recruit and train more volunteers and/or build their **capacity** to influence decision makers.

Please note: we are not able to fund party political activities.

To check if a project or an activity would be eligible **please email [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk) or telephone 01768 210276.**

### **2.3 What we will fund?**

The following types of expenditure will be eligible:

- Direct costs – e.g. project specific costs such as
  - Revenue - e.g. staffing costs, room hire, refreshments, promotion, publicity etc
  - Equipment and other capital expenditure relating to the project but excluding purchase of motor vehicles, buildings, and land.
- Indirect costs– e.g. an appropriate contribution towards the organisational overheads for an existing group to enable full cost recovery for their project but limited to a maximum of 15% of the value of the grant.

#### ***Please note:***

- Applicants will not be able to apply for a grant towards expenditure which has already been incurred or which will be incurred before the decision is communicated to the applicant.
- The grant must not be used to cover the cost of any alcohol

### **2.4 Evaluation criteria**

The following gives an outline of what we will be looking for in successful applications:

#### **2.4.1 Aims**

Does the project fit within the aims of the fund (i.e. support for activities which will reduce carbon emissions; activities which will engage more people and/or build knowledge and understanding of climate change; activities which add value to other projects being delivered via the ZCC programme; and / or support for the organisation to build capacity to become more effective)? To what extent does the project involve the community?

### **2.4.2 Quality**

Does the group have experience / or additional support to be able to deliver this work? (NB – we wish to support groups to get started therefore this criterion is not meant as a barrier to awarding funding to grassroots groups. If necessary, we will look at sourcing or providing additional support). Is the proposal creative, inspiring, reaching out to a new audience? Are the proposed materials / methods likely to achieve their stated project aims? Is there evidence of collaboration / discussion with key partners? If working in partnership, how viable is the proposed partnership?

### **2.4.3 Value for money**

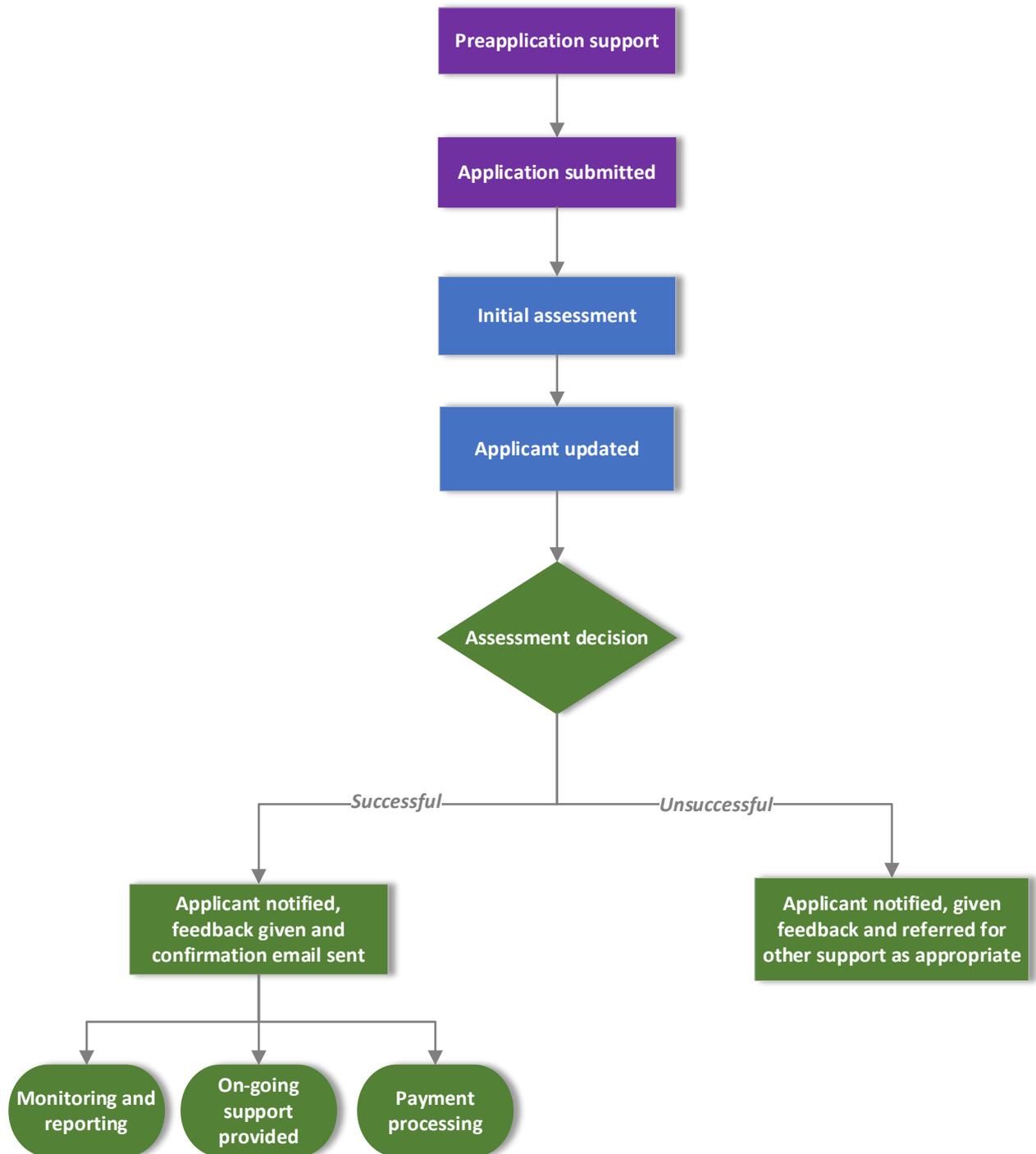
Does this project represent value for money? How many people will be involved, and to what extent will they be engaged in the project? What will be the likely level of carbon saving (not an exact amount, but a rough idea of how much carbon will be generated, recycled, or saved?). Could this work be delivered more cheaply / for free by using existing resources (e.g. around infrastructure support) or in collaboration with another organisation?

### **2.4.4 Promoting inclusivity and spread of investment**

Is this a group which hasn't received funding to work on climate change issues previously? Do they represent sectors which may be disadvantaged / disproportionately affected by climate change e.g. recipients of Universal Credit; private rented / social housing tenants; are they working with older or disabled people, or the digitally excluded; are they a youth group, migrants or refugees? Is the application from a group based in an area without an established sustainability group?

### 3 Overview of the application and assessment Process

The application and assessment process is illustrated below



### ***3.1 Pre-application support***

A range of support is available to anyone interested in submitting an application including:

- Advice and guidance from the CSN Coordinator such as feedback on a project idea and/or referrals to specialist advice on organisational structures for community groups. The CSN Coordinator will also put groups with complementary ideas in touch with each other.
- Webinar guidance on completing an application
- Details of example projects
- FAQs (Frequently asked questions) which are kept regularly updated.

For more details of the pre-application support **please email [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk) or telephone 01768 210276.**

### ***3.2 Application submission***

Please download, complete and save the appropriate application form from the website and make sure that you sign up to the terms and conditions. The forms can be submitted electronically to [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk) or by post. If submitting applications electronically we recommend that you request a delivery receipt as this will alert you if you have accidentally typed in the email address incorrectly.

Once we have checked that we can open the application we will send a confirmation receipt which will include a project reference number.

### ***3.3 Initial assessment***

We will undertake an initial assessment of the project which will cover eligibility, organisational and financial due diligence and the following evaluation criteria.

- Fit with the objectives of the fund
- Benefit to the organisation and/or to the local community
- Value for money

We will provide feedback to the applicants following this initial assessment.

### 3.4 Assessment decision

Decisions will be made as follows

Small grants	Decisions will be based on a recommendation from the initial assessment which will then be reviewed/approved by the CEO of CAfS or by a CAfS Trustee.
Medium grants	Decisions will be based on a recommendation from the initial assessment will be then reviewed/approved by the steering group.
Large grants	The initial assessment will be followed by an assessment based on the principles of participatory budgeting as determined by the steering group.

We will aim to notify applicants and provide feedback as indicated below.

	<b><i>Initial feedback</i></b>	<b><i>Confirmation of decision</i></b>
Small grants	Within 3 working days	Within 10 working days
Medium grants	Within 10 working days	Within 1 month
Large grants	Within 1 month	Within 2 months

### 3.5 Conditions of funding

The terms and conditions attached to the award are given in Appendix 1. Applicants are required to commit to these terms and conditions as part of the application.

NB one of the requirements is to ensure that the National Lottery funding is acknowledged and promoted in the local media and all marketing materials. Guidance on appropriate wording and links to downloadable logos will be provided to successful applicants.



### **3.6 Payments**

For small and medium grants, we anticipate paying the grant in full at the start of the project. For larger projects we will either pay the grant in full at the start of the project or agree a schedule of payments.

### **3.7 Project monitoring**

The partnership expects all applicants to monitor the impact of their project. The level of monitoring required will be dependent on the type of grant received. Details of monitoring arrangements will be included with the confirmation email. Please see Appendix 4 for more information about the types of things that you would like to record throughout your project in order to complete your monitoring form.

As appropriate the Partnership may visit the project and also ask to see further documentation and records in support of the monitoring arrangements.

During the funding period we will want to learn about the progress of the project for which you received funding, whether the project is likely to achieve what it set out to deliver or if changes are required.

## 4 Guidance on the Application Forms

Please note there is a different application form for each of the three categories of grant. Each has been designed to request sufficient information to allow a robust assessment in way which is proportionate to the amount of funding requested.

In each case there are sections for you to tell us about your project:

- For the small grants application, we only ask that you describe what you would like to do and why, what the outcomes/benefits will be and to provide a basic breakdown of costs.
- For large grants applications, we ask for some more detail about the project and the costs.
- For each question there are some short explanatory notes.

In each of the application forms there are also sections for you to tell us about:

- Your organisation, including details of your bank account
- Your contact details so we know who to contact in connection with the application

There are also sections which cover any supporting documents required, the terms and conditions and a declaration.

### 4.1 *General guidance*

Here are some ideas of what to tell us about your project:

- What would you like to do?
- What difference your project will make to climate change, your community and/or to your group?
- When do you expect your project to start and how long do you expect it to run for?
- How you'll make sure people know about it?
- How you plan to learn from it and use this learning to shape future projects?
- Is it something new, or are you continuing something that has worked well previously? (We are willing to fund both types of projects.)

- Will this grant enable you to lever in additional money from other sources to help you achieve your aims?
- What are the project risks, and how will these be mitigated?
- Has consideration been given to how to maintain and embed the longer-term benefits of the grant funding? If so, how will this be achieved? What will be the legacy of this project?
- Types of activities which are capacity building include, for example, training courses and visiting other projects.

If you are submitting a partnership application, please provide a signed and dated partnership agreement and let us know

- Who else is involved with the project?
- What skills and experience do they have?
- Will your project result in new collaborations?

Here are some examples of how you could be involving your community:

- Having regular chats with community members, in person or on social media
- Regular surveys
- Including articles in your community newsletter
- Setting up groups to focus on a particular issue of concern
- Running open days, free stalls or social events
- Involving volunteers in delivering climate change activities and if so, approximately how many hours will they contribute?

The following definitions of output and outcome might be helpful:

- Outputs – The actions or items that contribute to achieving an outcome
- Outcomes – The difference that the project will make.

## 5 Terms and Conditions

1 By submitting an application to the Zero Carbon Cumbria (ZCC) Community Climate Grants, the organisation named in the application (referred to as “you” in these Terms and Conditions) agrees, if awarded a grant, to:

1.1 hold the grant on trust for the ZCC Community Climate Grants (referred to as ‘we’ or ‘us’) and use it only for your project as described in your application or otherwise agreed with us, and only for expenditure incurred after the date of your grant award;

1.2 provide us promptly with any information and reports we require about the project and its impact, both during and within one month after the end of the project;

1.3 act lawfully in carrying out your project in accordance with best practice and guidance from any relevant regulators, and follow any guidelines issued by us about the project or use of the grant and let us know promptly about any fraud, other impropriety, mismanagement or misuse in relation to the grant;

1.4 acknowledge National Lottery funding using the common lottery branding in accordance with relevant brand guidelines;

1.5 hold the grant in a UK based bank or building society account which satisfies our requirements as set out in guidelines and requires at least two unconnected people to approve all transactions and withdrawals;

1.6 immediately return any part of the grant that is not used for your project or which constitutes an unlawful subsidy;

1.7 where your project involves working with children, young people or adults at risk, adopt and implement an appropriate written safeguarding policy, obtain written consent from legal carers or guardians and carry out background checks for all employees, volunteers, trustees or contractors as required by law or the National Lottery’s Guidance to Grantholders on “Safeguarding the Vulnerable People We Support” which is available on the National Lottery’s website (National Lottery Awards for All England | The National Lottery Community Fund ([tnlcommunityfund.org.uk](http://tnlcommunityfund.org.uk)))

1.8 Cumbria Action for Sustainability or the National Lottery may commission research into and/or evaluation of your funding. You confirm

that you will co-operate with any research or evaluation-related activities which we carry out and further confirm that we may use any part of your application and/or project information for research or evaluation purposes;

1.9 comply with data protection laws and obtain the consent of your beneficiaries for us and you to receive and process their personal information and contact them;

1.10 keep accurate and comprehensive records about your project both during the project and for seven years afterwards and provide us on request with copies of those records and evidence of expenditure of the grant, such as original receipts and bank statements;

1.11 allow us and/or the Comptroller and Auditor General reasonable access to your premises and systems to inspect project and grant records;

1.12 allow CAfS and the National Lottery to publicise and share information about you and your project including your name and images of project activities and ensure that this is covered in your Privacy Policy. You hereby grant us a royalty free licence to reproduce and publish any project information you give us. You will let us know when you provide the information if you don't have permission for us to use it in this way;

2 You acknowledge that we are entitled to suspend or terminate the grant and/or require you to repay all or any of the grant in any of the following situations. You must let us know if any of these situations have occurred or are likely to occur.

2.1 You use the grant in any way other than as approved by us or fail to comply with any of these Terms and Conditions.

2.2 You fail to make good progress with your project or are unlikely in our view to complete the project or achieve the objectives agreed with us.

2.3 You have match funding for the project withdrawn or receive or fail to declare any duplicate funding for the same project costs as funded by the grant.

2.4 You provide us with false or misleading information either on application or after award of the grant, act dishonestly or are under investigation by us, a regulatory body or the police, or if we consider for any other reason that public funds are at risk or you do anything to bring us or the National Lottery into disrepute.

2.5 You enter into, or in our view are likely to enter into, administration, liquidation, receivership or dissolution.

2.6 You receive any grant money incorrectly either as a result of an administrative error or otherwise. This includes where you are paid in error before you have complied with your obligations under these terms and conditions. Any sum, which falls due under this paragraph 2.6 shall fall due immediately. If you fail to repay the due sum immediately, or as otherwise agreed with us, the sum will be recoverable summarily as a civil debt.

3 You acknowledge that:

3.1 the grant is for your use only and we may require you to pay us a share of any proceeds from disposal of assets purchased or enhanced with the grant;

3.2 we will not increase the grant if you spend more than the agreed budget and we can only guarantee the grant as long as The National Lottery continues to operate and we receive sufficient funds from it;

3.3 the grant is not consideration for any taxable supply for VAT purposes;

3.4 we have no liability for any costs or consequences incurred by you or third parties that arise directly or indirectly from the project, nor from non-payment or withdrawal of the grant, save to the extent required by law;

3.5 these Terms and Conditions will continue to apply for one year after the grant is paid or until the project has been completed, whichever is later. Clauses 1.2, 1.4, 1.6, 1.8, 1.9, 1.10, 1.11, 1.12, 3.4 and 3.5 shall survive expiry of these Terms and Conditions; and

3.6 if the application and grant award are made electronically, the agreement between us shall be deemed to be in writing and your online acceptance of these Terms and Conditions shall be deemed to be the equivalent of your signature on that agreement.

# Appendix 1 Template Constitution

## Zero Carbon Cumbria Community Climate Grants

### Template constitution

#### Notes:

- **This is a very simple set of rules or “constitution” for a small not-for-profit community group. It should be only used by groups which do not yet have a constitution in order to apply to the Zero Carbon Cumbria Community Climate Grants.**
- **These rules set out processes to help the members run the group, make decisions and manage any money given to the group.**
- **These rules are a simple starting point for a community group and should be read carefully to check they will work for your group. They are not a substitute for legal advice. If your group continues after your project has been completed please get legal advice or support from Cumbria CVS to develop a fuller constitution.**
- **In a large group, once established the ‘members’ may be the decision makers / organising committee and other attendees would not need to sign this constitution if they are not involved in decisions of the group. Each group is different, it is up to your group who is a member.**

1. Our group has come together for an event, activity or other purpose to help our local community take climate action and reduce carbon emissions, hereafter referred to as the “project”.
2. The members of the group are listed on the next page. New members can join the group. All the members agree to follow these rules.
3. We will make decisions as a group in this way:
  - the group will normally make decisions at a meeting of all the members
  - a meeting can only take place if at least half the members attend. If there are only two members, both must attend the meeting
  - decisions must be agreed by over half of members who attend the meeting
  - if we don't have time for a meeting, we can also make decisions by every member agreeing in writing, including by email
4. We will use any money or grants given to the group to deliver the Zero Carbon Cumbria funded project for the benefit of our community. We will only spend the money on things we have decided on as a group.

5. We are all responsible for the group's money, any prepaid cards given to the group and anything we buy for the group. We are all responsible for any debts incurred by the group and for any contracts made by the group.
6. We will put one person in charge of spending the money once we've all agreed. They will keep a list of the spending, and any receipts we get for the things we buy. Contracts must be approved by the group first and signed by at least two members.
7. We won't keep the group's money for ourselves or pay ourselves for running the group (apart for out of pocket costs such as refreshments).
8. We won't spend the group's money with companies or individuals a member is closely involved with (this is known as a '*conflict of interest*') unless the group has decided that's ok first. This would include a member's wife/husband, civil partner, children or grandparent.
9. This constituted group will cease to exist after the Zero Carbon Cumbria project has been completed. Our group may continue informally without a constitution.

10. **Members of the group**

<b>Name</b>	<b>Address</b>	<b>Signature</b>

## Appendix 2 Template Delivery Plan

A delivery plan will help you keep track of what you plan to do, by when, what the costs are, who is responsible, how you will review how you are doing and how you will troubleshoot any problems that come along. It could also include significant ‘milestones’ e.g. an event or conference, filming for a video, recruitment of new staff member or a volunteer open day. It will be an invaluable tool to help you complete your monitoring reports and for you to evaluate your project’s success.

Developing a delivery plan for a large grant application form will help you think through what will be required to complete your project, so will be a helpful way of informing your budget. It can be as simple or complex as you choose. If you are happy with using IT, then it might be an idea to construct a GANTT chart to help you plan; [What Is A Gantt Chart? | Definition & Examples | APM](#)

It is helpful to think about your activities in terms of :

- Outputs – The actions or items that contribute to achieving an outcome
- Outcomes – The difference that the project will make.

Please note that although we do not require this level of detail for applications under our small and medium grants programmes, this still may be a useful way of planning your project and making sure that you keep on track with delivery!

What do we plan to do?	Who will we involve ?	Time period	How much will it cost?	Milestones (incl. date)	Planned Outputs	Who is responsible?	Are there any risks ?	Review completed (Report for Committee meeting)
		First month						
		First quarter						
		Second quarter						
		Project end		Monitoring report sent to CAfS!				

## Appendix 3 Template Budget Breakdown

A budget is just a way of expressing what your group's plans are in money terms. For the purposes of your application, we require a budget breakdown for all the expenditure you are planning as part of your project. We also need to know what other money you will be receiving, either as grants from other sources or as income for charging for an event or service.

### Constructing a budget

Write a list of all the items that you are likely to need to pay for. Estimate the cost of each item of expenditure as accurately as you can. If you have been running the same activities for a while, you can base your estimates on previous years – but remember to increase them in line with inflation. Keep notes of how you arrive at your figures. For example, note down that 'hall hire' is a known cost based on 26 weeks or that the figure for insurance is a rough estimate based on a quick search on the internet. The notes will be invaluable when you need to explain your figures to the group or with CAfS. Once you've constructed a draft budget, it's important that you discuss it with your group and agree it at a meeting.

Once you have finalised your budget, this will help you to make financial decisions and keep control of your spending during your project. It means that it is unlikely that you'll run out of money by mistake, but it could mean that you need to plan in more fundraising to sustain or develop the project further!

### Template form

This is the form included within the large grant application form.

As instructed in the form, please use budget headings, rather than a detailed list of items. For example, if you're applying for pens, paper and envelopes, using 'office supplies' is fine. Please enter whole numbers only and include any non-recoverable VAT.

<b>Budget headings</b>	<b>Total costs</b>	<b>Amount Requested from ZCCP</b>
<b>TOTAL</b>	£	£

You are also requested to supply details of any other 'matched' funding that you expect to receive from another source e.g. another charitable trust fund, from individual donors or from a local authority.

### **Eligible and ineligible expenditure**

Eligible expenditure could include staff and volunteer costs; equipment; training courses; project activities and a contribution to fixed costs (e.g. office rent, utilities, IT costs, audit costs, insurance costs etc.). You can apply for up to 15% of your project costs to cover these overheads.

Please note that you cannot apply for money to cover costs of purchasing land, buildings or motor vehicles, or anything that will result in private gain for an individual. You can only include VAT on purchases if your organisation is not VAT-registered (and therefore able to reclaim this money from HMRC). Expenditure from the fund cannot be used for activities of a political or exclusively religious nature, and cannot be used to pay for a professional fundraiser. Any campaigning activities must be carried out in line with Charity Law (see additional guidance section).

We are only able to fund new expenditure – i.e. costs that you have not yet incurred, and can only fund activities that have not already been funded through another grant source. (In other words – no retrospective funding and no duplication of funding!). We cannot allocate funding for any 'in kind' donations of time or services that you have received for free.

## **Appendix 4 Reporting Template**

Keeping records of activities funded through the Zero Carbon Cumbria Community Climate Grants is essential to :

- Keep track of your progress and make sure you are achieving what you set out to do
- Be accountable to the National Lottery Climate Action Fund (which has provided the resources to CAfS / ZCC to deliver this funding programme)
- Enable CAfS / ZCC to demonstrate the overall impact of the Zero Carbon Cumbria Community Climate Grants (by adding your contribution to that of others)
- Build up a good record of delivery which will help you when applying for other grants (think of it like credit score ratings)
- Enable you to be able to report to your members at your regular meetings / Annual General Meeting (if you keep records as you go along, then it is easier to collect information at the end of the year)
- Shout about your achievements and inspire others!

By signing up to the terms and conditions outlined in your application, you will have committed to providing CAfS with monitoring information.

When you receive your grant, if you haven't already discussed this as part of the application process, it is important that you agree with other members of your group:

- What you will measure / count / report on during the delivery of your project (please see list of suggestions at the end of this section)?
- Who is going to keep records?
- How the records will be kept?
- How they will be shared (with your group and with the Zero Carbon Cumbria Community Climate Grants)? \*\* Please see attached template for reporting to CAfS.

The main aims of this programme as part of the Zero Carbon Cumbria Partnership are to :

- Broaden engagement.
- Deepen engagement.
- Empower communities and citizens to take action which will reduce emissions.
- Build capability and capacity within grassroots sustainability organisations.

We want to know how your group is contributing to these aims. Specifically, we would like you to record some or all of the following:

- Did you establish a new group or partnership with this funding? (Please describe)
- Has your group increased in membership, increased your numbers of social media followers, seen increased attendance at regular events? (Please explain)
- Did your project help tackle carbon emissions? (Please describe how this was achieved)
- How many people were directly involved in your project? (Please keep records of any events or activities you have held with support from your funding e.g. how many people came to your repair café, how many people attended your speaker meeting, how many people got involved in tree planting, how many people signed your petition etc.)
- How many of the people directly involved in your project were under 25?
- How many additional volunteers (e.g. new committee members or people who have helped out at an event) have you recruited as part of this project? (please give details)

- Did you receive any press or media coverage of your project? (If so, please detail and include an attachment with news items etc. if possible)
- Have you been able to influence a decision / inspire a new approach as a result of your work (if so, please give details)

\*\* We would love case studies of your work to include on our website and in press releases to inspire and encourage others to get involved. A written case study is great – but even better would be photos, drawings, videos or any other creative way of illustrating your achievements.

Please don't leave this element of your project to the end of your grant. We will send you a reminder when we need your final monitoring report. We will require this within .... of the end of your project. Why not put a reminder in your calendar now?

If you are experiencing any major delays or problems with your grant, please don't suffer in silence – get in touch with [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk) so that we can discuss what options are open to you.

### Monitoring report form

Please complete the template below to tell us about the impact of your project.

Project name	Ref. no	Date	Name of person completing this form and their role within the organisation.
<p>1). Did you establish a new group or partnership with this funding? (If yes, please describe and tell us who you have been working with)</p>			
<p>2). Has your group increased in membership, increased your numbers of social media followers, seen increased attendance at regular events? (Please explain)</p> <p>Number of members / attendees / social media followers at beginning of project ....</p>			

Numbers of members / attendees / social media followers at the end of the project ...

3). Did your project help tackle carbon emissions? (Please describe how this was achieved

4). How many people were directly involved in your project? (Please keep records of any events or activities you have held with support from your funding e.g. how many people came to your repair café, how many people attended your speaker meeting, how many people got involved in tree planting, how many people signed your petition etc.)

5). How many of the people directly involved in your project were under 25?

6). How many additional volunteers (e.g. new committee members or people who have helped out at an event) have you recruited as part of this project? (please give numbers and details)

7). Do you have any particular successes/highlights/good news stories/things that you have learned that would be helpful to share with others?

8). Please provide a breakdown of your actual expenditure for the project.

You'll need to return any money not spent to us so we can use it to fund other projects, or we may agree that you can spend it on something else. (Please discuss this with [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk) before you return the form to us.)

Amount awarded (date)	Amount spent (please itemise)	Amount remaining	Any proposals on further expenditure?

**NB You must keep financial records of you project including any receipts or invoices as evidence of expenditure for audit purposes.**

Check the box to confirm that:

- the information in this report is accurate and true and has been approved by your organisation's committee
- the money from ZCC Community Climate Grants has been used exclusively for the project described in your original application, together with any changes you've agreed with us since then
- you've told us about all other sources of funding for your project and you haven't received any duplicate funding for the activities you have delivered
- you have sought to achieve value for money for your project by securing goods and services at reasonable prices
- your organisation has kept full and proper accounts and records, including invoices and receipts
- your organisation is following all current statutory requirements and other laws and regulations relating to the project and its work including: adherence to employers' liability insurance; the national minimum wage; the working time directive; health and safety; safeguarding of children, young people and vulnerable adults; data protection and intellectual property rights legislation.

I agree\*

## Appendix 5 Advice and Assistance

### Helpful organisations

There is plenty of help and guidance out there to support you in making an application, or in strengthening your group / organisation and applying for further funding from elsewhere. CAFS' Sustainability Network Coordinator is available to give support and advice, and may be able to share contact details of member groups who could also be able to help. [communitygrants@cafs.org.uk](mailto:communitygrants@cafs.org.uk)

## **Help to strengthen your organisation**

Depending on the type of organisation, you can access help from a number of sources including :

**Cumbria Council for Voluntary Services:** Cumbria CVS offers help, advice, training and support to third sector groups throughout Cumbria. They have lots of really useful guidance on their website:

[Development | Cumbria CVS](#)

**Action with Communities in Cumbria** has a particular focus on supporting communities in rural areas: [Rural and community development charity for Cumbria - Action with Communities in Cumbria, Penrith, Cumbria \(cumbriaaction.org.uk\)](#)

They have many useful resources on their website, including how to set up a new group:

[Setting up a group Cumbria - Action with Communities in Cumbria, Penrith, Cumbria \(cumbriaaction.org.uk\)](#)

**Cumbria Social Enterprise Partnership** : [Home - Cumbria Social Enterprise Partnership \(secumbria.org\)](#) is funded by Cumbria County Council and aims to provide support and increase the numbers of social enterprises in our county.

### **Additional funding support**

The Zero Carbon Cumbria Community Climate Grants is not the only source of funding which might be able to support your work. There are many other trusts and grant making bodies that could contribute towards you achieving your goals, including **Cumbria Community Foundation** [Cumbria Community Foundation - Connecting People Who Care With Causes That Matter \(cumbriafoundation.org\)](#)

The **Lake District Foundation** has a range of funds available including a Low Carbon Lake District fund which could be used as matched funding [Apply for a Grant - Lake District Foundation](#)

Landfill tax is donated to **Cumbria Waste Management Environment Trust** to support local groups: [Grant Info - Cumbria Waste Management Environment Trust \(cwmet.org.uk\)](#)

You can apply directly to the National Lottery via their **Awards for All** fund: [National Lottery Awards for All England | The National Lottery Community Fund \(tnlcommunityfund.org.uk\)](#). Please note that applications to National Lottery funds must be for a different project to your application to the Community Climate Grants.

See also **Directories of Grant Making Trusts** for information on a range of different charitable trust funds – this can be accessed via Cumbria CVS.

**Local authorities** often have a pot of funding to support community groups:

For example, please see Cumbria County Council's website: [Community Grants | Cumbria County Council](#)

### **Local funds**

There may be additional funding available in specific areas, for example Low Carbon Barrow will have grants available over the next 2 years: [Low Carbon Barrow - Art Gene \(art-gene.co.uk\)](#) and there is funding and additional support available for West Cumbria: [Cumbria Community Foundation - Connecting People Who Care With Causes That Matter \(cumbriafoundation.org\)](#)