

Grants Registration Guidance

These guidance notes will help you complete the registration requirements for South Gloucestershire Council's online grants. You can save details and return to your account at any time.

This information can be made available in other formats. You can phone 01454 868009 if you need help to access our services.

See our [grants privacy notice](#) to find out how we use your data.

If you have any queries or need advice you can contact the Grants Helpline on 01454 865865 or grants@southglos.gov.uk.

You only need to register your organisation once.

You first need to set up online account with an email address and secure password. If you forget your password you can use the forgotten password function to get a new one sent to your registered email address.

It is your responsibility to maintain and keep contact details and supporting documents up to date.

You need to provide details of three contacts in your organisation to help us communicate with you.

You will need to provide all the required details before being able to submit the request for registration.

An automated email will be sent to your registered email account after you have completed all registration details and submitted the online form.

We will assess the details of your organisation and will contact you if further information is required.

An automated email will be sent to your registered email account when the organisation has been approved.

Creating an account

To create an account for your organisation or to edit your existing account you can click on the Register or Log in button to follow one of the following options:

- login to your account
- registering your organisation for the first time
- forgotten your login details

When you have logged in you will reach the Welcome page where you will be offered two further options:

- View registration details – this only allows you read existing details or
- Change or submit your registration – this allows you to add or edit details.

Registration dashboard

Information about your organisation is required in the following sections:

1. Organisation contact details
2. Governance and management
3. Financial management
4. Services or activities
5. Staffing and volunteers
6. Contact details.
7. Supporting documentation - all organisations must upload the following documents:
 - constitution or governing rules
 - equality and diversity policy
 - safeguarding policy
 - financial accounts for the most recent reporting year

Section 1: Organisation contact details

1.1 Name of organisation

Enter the official name of your organisation with no abbreviations. The name must match the name on the governing document. If the organisation is part of a national network but has a local name then provide this, such as, Real Green Southwest not RGSW.

1.2 Other names by which your organisation has been known

List former names the organisation has been known by. We ask this because we might have information about your organisation under a different name.

1.3 Organisation address

If you do not have a specific office base then you can use the address of the lead contact. There is an automated address finder.

1.4 Organisation telephone number

This should be the telephone number at the organisation's base address. If you do not have an office telephone you can provide the number for the contact person responsible for the registration.

1.5 Organisation email address

We recommend that you provide a generic office email address for your organisation. If you do not have an office email you can provide the personal email address for the contact person responsible for the registration. For reasons of data security we recommend that you set up an organisation email address.

1.6 Organisation website.

This is not essential. We recognise that not every organisation has a website so you can this leave blank if not applicable.

Section 2: Governance and management

2.1 Tell us what type of organisation it is:

Funds can only be awarded to

- voluntary, community or social enterprise organisations
- town or parish councils

You must select at least one option. If none of the options match your organisation then choose 'other' and give details.

The organisation can be a social enterprise or a community group such as a tenants' association or friends group but it must have charitable and not for profit aims.

The organisation does not have to be a registered charity to apply for funding.

Identification

You should provide the appropriate registration numbers if any of the following apply to your organisation.

2.2 Registered charity number

If your organisation is registered with the Charity Commission for England and Wales then provide the appropriate charity number. If not, leave blank.

2.3 Company number

Provide the appropriate company number if your organisation is registered with Companies House. If not, leave blank.

2.4 Is your organisation registered for Value Added Tax (VAT)?

Check with the treasurer or finance officer for the organisation.

Choose one option from Yes / No / Not sure

2.5 Registered VAT number

Provide the VAT registration number if your charity or company is registered for VAT.

Governance

2.6 How long has your organisation been established?

Choose one option.

If your organisation was formed recently we can signpost you to support or guidance.

If your organisation is well established, you can demonstrate experience and track record in your funding application.

2.7 How many people are on your governing body/committee?

Choose one option.

A governing body or committee is responsible for the organisation's management and funding. It is usually made up of members of the group who are elected at the Annual General Meeting.

The constitution should detail the date of the AGM and the procedures for appointing officers/committee members. If you are members of a national body such as the Scout Association or Girlguiding then this question applies to your local committee only.

Section 3: Financial management

Provide your organisation's bank or building society details for the account you wish money to be paid into.

We cannot pay into a personal account.

3.1 Confirm that your organisation has a minimum of two signatories for the bank or building society account.

Choose one option.

The organisation must have at least two authorised signatories on the bank or building society account. One of them must be a member of your governing body.

You must provide bank or building society details so that we payments can be made by BACS.

If your bank account details change for any reason you should provide the correct details. An automated response will be issued to the three named contacts for the organisation. If any contact has concerns on receiving an automated message they should immediately notify grants@southglos.gov.uk

3.2 Name of bank or building society

3.3 Account name

3.4 Account number

3.5 Sort code

3.6 Building society roll number (if applicable)

Section 4: Services or activities

4.1 What are your organisation's main areas of work or services?

Tick as many as apply.

Information about your organisation helps us to build a picture of services and activities in the area.

Examples have been provided but there is an option to tick 'other' and to tell us what your organisation does.

4.2 Provide a summary of your organisation's work or services

This is your chance to tell us about the aims of your organisation.

You can briefly describe the work of your organisation and the services it offers the community.

You can outline charitable purposes and inform us if you work with a particular age group or deliver a specific programme of activities.

Section 5: Staffing and volunteers

5.1 How many paid staff does your organisation currently employ?

Information about your staffing and volunteer numbers helps to build a picture of your organisation so that we understand how you operate.

If you are part of a national organisation then you should provide the staffing numbers for South Gloucestershire.

5.2 How many volunteers would you estimate contribute to your organisation over a typical year?

Information should include an estimate of the numbers of full time and part time volunteer supporters.

You should include your voluntary management committee members.

If you are part of a national organisation then you should provide the volunteer numbers for South Gloucestershire.

Section 6: Contacts

Details for three named contacts are required. There is an identical page for each contact. All should have separate email addresses and phone numbers.

Contact 1 Lead contact

Confirm the name, position in organisation, telephone number and email address for the person responsible for completing and updating registration details.

This could be the chair, vice-chair, secretary, a member of the committee or a staff member such as the administrator.

The email address you provide should be the best way of contacting you, now and in the future. For data security and continuity of contact, a generic office email address is recommended, although a personal office email address or a private email address are acceptable.

Contact 2

Confirm the name, position in organisation, telephone number and email address for a second contact.

This could be the vice-chair, secretary, a member of the committee or a staff member or lead volunteer.

Contact 3

Confirm the name, position in organisation, telephone number and email address for a third contact.

We recommend that this is the finance office or treasurer for the organisation.

We need this so that we can direct specific financial enquiries to one person.

Section 7: Submission of supporting documents

We can accept documents in most formats.

The maximum size of any document that you can upload is 5 megabytes. If documents exceed this they will need to be split into smaller sections to upload them to the system.

The acceptable formats that the system can accept are:

(bmp),(BMP),(doc),(DOC),(docx),(DOCX),(gif),(GIF),(htm),(HTM),(html),(HTML),(jpeg) JPEG),(jpg),(JPG),(msg),(MSG),(ods),(ODS),(odt),(ODT),(pdf),(PDF),(png),(PNG) (rtf),(RTF),(tif),(TIF),(tiff),(TIFF),(xls),(XLS),(xlsx),(XLSX),(zip),(ZIP).

Contact grants@southglos.gov.uk if you cannot upload documents.

Documents and policies

You can contact [CVS South Gloucestershire](#) for advice and training if you do not have a governing document or you would like to develop your safeguarding and equality policies.

We can supply template documents for your committee to review, amend and personalise to your organisation. Contact grants@southglos.gov.uk for further advice.

Accounts

All organisations must submit a report that represents their financial position over the most recent financial year. This can be:

- full, audited accounts
- independently examined accounts
- profit and loss and balance sheet statements
- income and expenditure statement
- an excel sheet showing 12 months transactions and current balance of funds

New organisations that have been active less than 6 months may upload copies of recent bank statements.

If your organisation's annual income is less than £5,000 you can upload a statement of account. Your written statement should show the organisations':

- full income over a 12-month period
- the expenses
- a closing bank balance
- note the bills remaining to be paid

Governing document

All organisations must submit a document that details your organisational 'rules' such as a constitution or memorandum and articles of association.

Constitutions usually cover the following:

- name of organisation
- aims
- members
- committee and officers
- AGM and other meetings
- procedural rules
- financial reporting
- changes to the constitution
- dissolution

Safeguarding policy

All organisations must submit a safeguarding policy, regardless of whether they work with children and/or vulnerable adults.

Equality and diversity policy

All organisations must submit an equality policy that covers employees, volunteers and service users.

Declaration

You should read the terms and conditions carefully before you submit your registration.

To finalise your registration you must tick the authorisation box which confirms that you understand the terms and conditions attached to any offer of an award.

You can review your registration to check all the details and then press the Submit button. We cannot review and approve your registration unless you Submit the form.

If you do not Submit the form the status of the record will show as Work in Progress.

We welcome any feedback on how we can improve the process; email your comments to grants@southglos.gov.uk