



A guide for organisations wanting to apply to run the Big Local Trust

Big Local Trust



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Our website www.biglotteryfund.org.uk

Accessibility

Please contact us to discuss any specific communication needs you may have.

Our equality principles

Promoting accessibility; valuing cultural diversity; promoting participation; promoting equality of opportunity; promoting inclusive communities; reducing disadvantage and exclusion. Please visit our website for more information.

We care about the environment

The Big Lottery Fund is working towards sustainable development and the use of sustainable resources.

Our mission

We are committed to bringing real improvements to communities and the lives of people most in need.

Our values

We have identified seven values that underpin our work: fairness; accessibility; strategic focus; involving people; innovation; enabling; additional to government.

The Big Lottery Fund is committed to valuing diversity and promoting equality of opportunity, both as a grantmaker and employer. The Big Lottery Fund will aim to adopt an inclusive approach to ensure grant applicants and recipients, stakeholders, job applicants and employees are treated fairly.

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About Big Lottery Fund

The Big Lottery Fund currently gives out half the money raised by the National Lottery for good causes. Our mission is to bring real improvements to communities and the lives of people most in need.

You can find out more about us, our values and the funding programmes we run by visiting our website www.biglotteryfund.org.uk

About our Big Local Trust programme

The Big Lottery Fund wants to make a difference to the lives of people in need, wherever they live, and help people improve their lives over the long-term.

Our work shows us that there are urban and rural neighbourhoods throughout England where people face complex, inter-related problems. These vary from place to place, and can include:

- high levels of poverty and unemployment
- crime and fear of crime
- poor qualifications and health
- feelings of isolation
- badly kept public space
- poor access to shops, banks, advice, and public services
- tension with other communities
- young people with little to do
- older people who are afraid or unable to go out.

These problems can go on for years. Any improvements are vulnerable to external shocks, such as the economic downturn or the effects of severe weather.

In these neighbourhoods there may be community spirit but it is often hampered by a sense of disenfranchisement. This can manifest itself in a number of ways, including a lack of fundraising and project delivery skills, mistrust of the statutory or public sector and low morale. This makes it much more difficult for a conventional funding approach to succeed, so even where money has been targeted to help it has not always made the long-term difference that was hoped.

There are approaches, however, which have done better: flexible, long-term and locally determined approaches like those pioneered by our Fair Share Trust programme, which since 2002 has been investing over £39m in 45 neighbourhoods in England. This programme has enabled local partners to get on with finding out what people need, and involve them in making decisions about how to use our money and making a difference over the longer term.

We want to build on the successes and experience of the Fair Share Trust, focusing on urban and rural neighbourhoods where people face many needs and have a history of difficulty in obtaining the resources to help meet them.

Many local, regional and national organisations in the community and voluntary sector and government are passionate about making a difference in these neighbourhoods. Thousands of individuals and enterprises are also already working in them from day to day, improving things. They need support that recognises and builds their strengths, gives them the resources to go further, and helps others to come forward and do their bit. This is what the Big Local Trust is for.

Our approach

We want to provide long-term help that supports and joins up with the valuable work already being carried out at a community, local and national level to help disadvantaged and overlooked neighbourhoods.

To do this we will set up a new independent Trust and give it up to £200 million to invest and spend over about 10 years. This Trust will support local funding schemes in specified urban and rural neighbourhoods that will help meet local need and build skills and confidence in the communities.

An independent Trust brings with it many benefits. A Trust can plan for the long-term and ensure that money committed cannot be diverted for other uses. It can be flexible in the kinds of local spending it supports, including giving out grants, setting up microfinance schemes and neighbourhood endowments, and organising social investment bonds. It can help local partners attract further investments for neighbourhoods. A Trust may also recruit staff or contract with other organisations to carry out elements of its work, and raise money from other sources, to add to the money from us.

Another important benefit the Trust can bring is its ability to work at neighbourhood level to provide support to communities: building confidence, developing skills and helping them to identify and tackle issues they prioritise.

How the Trust will work

The Trust will be set up to achieve the aim of our Big Local Trust programme:

To enable people to make their communities better places to live in, now and in the future, by helping them develop the skills and confidence they need to identify priorities that matter to them and to take action to change things for the better.

The Trust will focus its work on between 100 and 150 disadvantaged and overlooked urban and rural neighbourhoods in its lifetime. The targeted neighbourhoods are all places where many people face multiple barriers to meeting their needs, and which have not had great success in gaining resources to help. We have already selected the first 50, based on extensive analysis and discussion in each of our nine England regional areas, and we will also select a further 50-100. Details of the first 50 neighbourhoods are available on the Big Lottery Fund website www.biglotteryfund.org.uk/biglocaltrust

The Trust will have its own objects, which describe what it is set up to do. It will also have powers that set out the ways it can achieve its objects, for example, by giving grants, providing loans or tendering for services. These will include the power to seek other income to add to its endowment from the Big Lottery Fund.

Outcomes

BIG expects the Trust to achieve the following outcomes in the targeted neighbourhoods:

1. Communities are better able to identify needs and responses to them and to take action to deal with them.
2. People in these communities will have increased the skills, confidence and social capital necessary to ensure that they continue to identify and respond to needs that matter to them in future.
3. The community will have made a difference to the needs it had prioritised.
4. People feel that their community is a better place to live in.

We are particularly concerned that local neighbourhoods should focus on meeting the third and fourth outcomes. Communities should set priorities that help them to meet the third and fourth outcomes; the Trustee and local partners should support their aspirations and in doing so, work towards the first two outcomes.

Local funding schemes

We expect the Trust to provide resources in the targeted neighbourhoods for local funding schemes that have the following six key features:

Continuous, inclusive, thoughtful involvement of local people

Residents in the targeted neighbourhoods must have a sense of ownership of the local schemes, and drive decisions about what is funded. The schemes should involve all sections of the community in discussions, not just relying on those who usually make their opinions known and those they speak for, and give people the opportunity to reflect and make their views count in the way that feels right for them. There should be a range of public involvement techniques, as well as differing levels of involvement. These could include resident involvement in grant-making and other committees and forums, and formal consultation about priorities.

Accountable local partnership

For any gains to be sustainable, and for the capacity of the community to increase, the programme will need to enhance links and build trust in each target neighbourhood, developing joint work to deliver local funding. This partnership work will need to involve neighbourhood and community organisations, local voluntary infrastructure where it exists, the local authority and other active interested people. It will need to be credible within the neighbourhood, accountable to them and the Trust, and have made every effort to be inclusive. The programme must allow time for such local partnerships to evolve.

Maximising long-term, inclusive benefit

The local funding schemes should seek to benefit all sections of the community in the target neighbourhoods, in line with priorities decided by the community and seek to secure these benefits in the long-term. This should include being open to a wide variety of different ways of resourcing local activities that could bring about a longer-term benefit, such as microfinance schemes, local asset banks and neighbourhood endowments.

Building capacity and sharing learning

A key element of this programme is that people and groups get better at gaining resources, exercising influence and effective self-help. Local schemes will need to give people and groups supported opportunities to make applications, represent themselves, run projects and learn from other areas that face similar problems. The programme as a whole will need to support local schemes to do this, to involve people and communicate achievements, to administer a wide range of different kinds of funding, and to win new resources for the target neighbourhoods.

Flexible and realistic planning

Successful action is neither haphazard nor rigid. In each local scheme, there will need to be agreed priorities, and a robust plan of how to achieve them – but also sufficient flexibility in the way the plan is managed to respond to new opportunities or changed circumstances. There must be review and time to get the plan right.

Additional to public money

Most of the money in the local funding schemes should go to community and voluntary groups, but experience suggests that some things communities want will best be managed by local authorities. Where this happens the Trust's money should not simply replace statutory funding, and should be given and monitored on the community's terms.

Setting up the Trust

We are inviting proposals to set up a new Company Limited by Guarantee to act as the Corporate Trustee for a new Charitable Trust in England.

We will give the new Trust an expendable endowment of up to £200 million. The endowment must be invested to produce an income and we will require all the investment and income to be committed by a date about 10 years from when the Trust is set up.

We will make up to £80,000 available from the £200 million as development funding to the preferred candidate we select following our assessment of the proposals we receive.

Development funding can be used for:

- preparing a business plan for the Corporate Trustee, which describes in detail how it will be run
- creating a manual of regulations that sets out how the Corporate Trustee will carry out the powers of the Charitable Trust to achieve its objects
- the legal costs of setting up the Corporate Trustee and Charitable Trust.

Developing a business plan, manual of regulations and an application to us for the endowment is likely to take some time. Our proposed timetable is included on the next page. It may be possible to complete the process sooner, or it could take longer.

The process and timetable

Proposals

July
2010

We launch our Big Local Trust programme on Tuesday 27 July 2010.

August
2010

You express your interest in the programme by 2pm on Thursday 12 August 2010 and attend our briefing session in London on Thursday 19 August 2010.

September
2010

You send us your proposal and request for development funding by 2pm on Thursday 23 September 2010.

October
2010

We write to you with our decision and announce the candidate we have chosen by Thursday 28 October 2010.

The preferred candidate

October
2010

We pay your development funding, so you can start developing your business plan and manual of regulations.

March
2011

You send us a detailed application, business plan and manual of regulations, which we assess.

June
2011

If your application is successful we offer the grant and work with you to set up the Company Limited by Guarantee and Charitable Trust. We then start transferring the rest of the £200 million to the Trust.

The proposal stage

What are we looking for?

At the proposal stage we ask you to set out your vision for the Trust, explain your approach and how you plan to meet our Big Local Trust aim, outcomes and priorities.

Your proposal can be up to 15 sides of A4 paper, plus any supporting documents we ask for. We do not need a fully developed business plan at this stage.

You can include a request for up to £80,000 development funding in your proposal, to pay for the costs of developing a business plan and manual of regulations and legal costs.

We hope that over the long-term the Trust will attract other social investment for work in the target neighbourhoods. Whilst there is no requirement for partnership funding you should explain in your proposal your plans to attract other funds, including how you might support local partners to do so.

Who should send a proposal?

We would like a partnership of organisations to come forward to develop the Trust. We believe a partnership approach is the best way to meet our programme outcomes and ensure that local action can be supported to meet needs in our target neighbourhoods.

The partnership should have the skills, knowledge and experience needed to:

- co-ordinate and support local funding schemes in 100 to 150 different local neighbourhoods and through a range of different local voluntary sector-led partnerships
- support thoughtful, inclusive and continuous engagement with and participation of communities in making decisions about long and short-term issues, in a wide range of contexts
- support community development and small group development processes, in a wide range of contexts

- support the implementation of a wide range of forms of social investment (including for instance, “real time” grants, microfinance schemes, neighbourhood endowments)
- support local partnerships to reach all sections of the community in the target neighbourhoods, and support these partnerships to build good relationships in the wider local context
- look after large investments
- distribute money efficiently and effectively and in line with public accountability standards
- promote policy and practice learning widely.

How to find out more

If you are thinking about sending us a proposal you should email us at biglocaltrust@biglotteryfund.org.uk with the following details by 2pm on Thursday 12 August 2010:

- organisation name
- main contact name and role
- contact details, including address, telephone number and email
- details of any communication needs or access requirements.

We will invite all the organisations that contact us to a briefing in London on **Thursday 19 August 2010 from 2pm to 4pm**, where we will explain the process and answer questions. We will email the questions and answers from this briefing and any others we receive to everyone that has expressed an interest in the programme.

There is no funding available from us for the development of your proposal.

We must receive your proposal by **2pm on Thursday 23 September 2010**. We will not consider proposals we receive after this.

Use the question numbers and headings below to set out your proposal. Parts 1-3 of your proposal should be no more than 15 sides of A4 in total.

What you need to include in your proposal

Part one – Organisation details

1.1 Organisation name

Give the full legal name of the lead organisation for your proposed new partnership, as set out in its governing document. Also tell us any other name the organisation is known by.

1.2 Main contact

Give the following details of someone from your organisation who can answer any questions we may have about your proposal: name, role or job title, address, phone number, email address. Also include details of any communication needs or access requirements they have.

1.3 Organisation status

Tell us the legal status of your organisation, for example, registered charity, or company. If you are a registered charity, give your registration number. If you are a company, tell us what type and give your company number. Confirm if you are registered for VAT and if you are, give your VAT number. Also tell us the year your organisation was established.

1.4 Partner organisations

List all the other organisations involved in your proposed new partnership.

Part two – Proposal details

2.1 Vision and outcomes

Summarise your vision for how the Trust will achieve the aim and deliver the outcomes of the BIG Local Trust programme:

We want to enable people to make their communities better places to live in, now and in the future, by helping them develop the skills and confidence they need to identify priorities that matter to them and to take action to change things for the better.

In the targeted neighbourhoods:

1. Communities will be better able to identify needs and responses to them and to take action to deal with them.
2. People in these communities will have increased the skills, confidence and social capital necessary to ensure that they continue to identify and respond

to needs that matter to them in future.

3. The community will have made a difference to the needs it had prioritised.
4. People feel that their community is a better place to live.

2.2 Local funding schemes

Tell us how your proposal for the Trust would provide resources in up to 150 small urban and rural neighbourhoods for local funding schemes and how you expect to be able to support the delivery of the six key features of these schemes:

- thoughtful, continuous, ongoing involvement of local people
- accountable local partnership
- maximising long-term, inclusive benefit
- capacity building and sharing learning
- flexible and realistic planning
- additional to public money.

2.3 Delivery

Tell us how the Trust would carry out its work over the period of the Trust, for example, tendering for support services or directly using its own resources.

2.4 Timetable

Provide a timetable for the first five years (from the date the endowment is awarded) with details of the main activities the Trust will carry out.

2.5 Staffing

Tell us how many employees you will need to deliver the objects of the Trust and summarise their main roles.

2.6 Monitoring, learning and communication

We expect the Trust to monitor the activities and track the outcomes it supports and commission independent evaluation of its work. This should support learning about the approach and achievements and challenges in the targeted neighbourhoods, as well as contributing to improvement of the programme throughout its life. Explain how the Trust would ensure that:

- progress across its work and in the targeted neighbourhoods will be recorded, reported to the Trustee (and thereafter to BIG), to local communities and to wider stakeholders
- learning about the approach and its successes will be identified and promoted amongst the local areas and at a national level.

Please also set out an outline communications strategy for the programme.

2.7 Equality

Explain how the Trust would meet all relevant legal requirements and comply with the Big Lottery Fund's equality commitments set out in our publication 'Equality Matters', which you can get from our website.

2.8 Experience

Tell us how you and your national partners provide the relevant expertise to deliver this Trust. Include your experience of delivering similar work, your experience of managing substantial investments, or how you will secure relevant expertise, for instance any extra financial expertise you will secure to enable you to efficiently manage the endowment.

2.9 Partnership and capacity

Tell us about the roles of the different organisations in your proposed partnership. Tell us how you envisage you and these organisations supporting the work of the Corporate Trustee. Explain how you will ensure that you and they have sufficient capacity to supply this support over the period of the Trust.

Part three – Budget details

3.1 Expenditure

Provide an outline of your expected expenditure for the Trust during each of the first five years from the date the endowment is awarded, showing separately the running costs and funds distributed to the targeted neighbourhoods, as percentages of total expenditure and expected amounts. Explain your assumptions in reaching these figures.

3.2 Income

Explain how you plan to manage the endowment fund and the expected rate of return.

3.3 Fundraising

Tell us briefly about any plans you have to attract other funds and social investments to add to the endowment or to support the work in the targeted neighbourhoods.

3.4 Development funding

We will make up to £80,000 available from the £200 million as development funding to the preferred candidate. Give details of the development funding you need and what it would be spent on.

Part four – Enclosures

Include the following enclosures with your proposal.

4.1 Governing document

Enclose a copy of your organisation's constitution, memorandum and articles of association or other governing document.

4.2 Annual accounts

Send us your organisation's accounts for each of the last three years. These must be signed and dated by your chair, secretary or treasurer and by your auditor or independent examiner where appropriate.

4.3 Annual report

Enclose your organisation's latest annual report. This should include your organisation's mission, a description of its normal business, size (number of staff, offices and membership), geographic area served (office locations, catchment area). If your annual report does not include some of this information, please produce separate enclosures that cover them.

4.4 Partner organisations

Enclose the information requested in 1.1, 1.2, 1.3, 4.1, 4.2 and 4.3 for every organisation listed in question 1.4.

Also include written evidence that the lead applicant is authorised to act in this capacity by the other partners. This should take the form of a letter to the lead organisation from each partner organisation on its official headed paper, signed and dated by a person with appropriate authority in the partner organisation.

4.5 Declaration

Enclose the following declaration for the organisation named in question 1.1, signed by your chair, treasurer or other senior member of your management committee.

I confirm that:

1. this proposal and application for development funding has been authorised by the governing body of the organisation named in question 1.1.
2. the information we have provided is true and the enclosures requested in 4.1, 4.2 and 4.3 are current, accurate, adopted or approved by our organisation.
3. our organisation has the legal power to receive a development grant and carry out the activities described in question 3.4.

I understand that:

4. if we make any misleading statements at any stage or knowingly withhold information this could make our proposal and application for development funding invalid and we will be liable to repay any funds.
5. if information about this proposal and application for development funding is requested under the Freedom of Information Act the Big Lottery Fund will release it.

I agree that:

6. the Big Lottery Fund can use the information we have provided for fraud prevention and detection purposes and share it with other organisations and individuals, including Lottery distributors, government departments and the media.

Signature

Date

Full name

Position in organisation

Home address

Date of birth

We ask for the date of birth and home address to help us prevent and detect fraud. All information provided will be kept in accordance with our data protection policy.

Selecting the preferred candidate

Once we have received all the proposals by the closing date of 2pm on Thursday 23 September 2010, we will carry out an assessment and select a preferred candidate.

We will consider:

- how your proposal meets the programme aim and outcomes
- how your proposal allows for the establishment of 100 to 150 local funding schemes
- how your proposal allows for supporting all aspects of local delivery
- how your proposal ensures that progress, learning and successes are communicated to the relevant audiences
- how your proposal addresses the legal requirements about equality and BIG's equality commitments
- the robustness and realism of your projected timetables, budgets, staffing levels and income and spending plans
- your experience of facilitating complex local programmes involving funding and support in a wide range of local settings
- the strength and appropriateness of your partnership
- your ability to support delivery over a ten year period in 100 to 150 targeted neighbourhoods
- your ability to manage an endowment of this size and your plans for managing this investment
- how well your proposal demonstrates value for money.

We may choose to invite some or all candidates to make presentations of their proposals.

Setting up the Corporate Trustee

The Preferred Candidate will set up a new Company Limited by Guarantee to act as the Corporate Trustee of the Charitable Trust. The Trust will be established for the charitable purposes of the relief of poverty, the advancement of education and the promotion of other purposes beneficial to the community.

We believe the most appropriate corporate vehicle is a Company Limited by Guarantee, which will be registered as a charity. Because the Memorandum and Articles of Association will control the governance and composition of the Corporate Trustee, they will have to be acceptable to the Big Lottery Fund and make provision for the Big Lottery Fund to nominate Directors of the Company Limited by Guarantee.

We believe this model offers great flexibility. Although it can only access the Trust's funds for the purposes of the Trust's charitable objectives, a Corporate Trustee is not restricted to acting solely in pursuit of the charitable objectives of the Trust. It can enter into contracts, sign licensing agreements and deal with its own funds, for example it may receive a grant directly for activities that are different from those that can be supported by the Trust. A Corporate Trustee can also be the Trustee of more than one trust.

Under this model, the individuals involved in running the Trust are not themselves trustees but they are members of the board of the Company, which is the Trustee. They are appointed under the Memorandum and Articles of the Company, which can be adapted or altered more easily than the Trust Deed. Their personal liability is limited, although of course they have all the normal legal duties of directors.

We will provide draft documents to you but will advise you to take your own legal advice. You can include legal costs in your request for development funding.

The application stage

The preferred candidate will develop and submit an application to us for a grant for the endowment. This application will comprise:

1. A business plan covering:

- mission, strategic objectives and priorities
- governance arrangements
- finance and administrative procedures
- delivery mechanisms
- staff and other resources
- timetable
- expected outcomes
- fund management policy and fund investment plan
- income, expenditure and cash flow
- fundraising strategy
- communication strategy.

2. A manual of regulations:

This describes the processes and procedures for how the Corporate Trustee will carry out the powers of the Charitable Trust to achieve its objects.

We will send guidance about our requirements to the preferred candidate.

Our assessment will consider:

- how the Trust's activities and services will achieve the aim and outcomes of the BIG Local Trust programme
- how the Trust will be run and whether this provides value for money
- the extent to which income and expenditure, cash flow and budget forecasts for the Trust are realistic
- proposals to manage the endowment, so that it is kept secure whilst maximising the income available
- how the Trust will ensure equality of opportunity throughout its operation and activities across England
- how the Trust will monitor and evaluate its activities and demonstrate the difference it has made.

During our assessment, we will commission a review of this documentation by external experts to assist with our decision-making. The purpose of this due diligence review is to:

- verify the accuracy and reliability of the information provided
- identify the critical risks to the successful delivery of the preferred candidate's proposals and any required action to be taken to progress the application for approval
- determine the overall viability of the preferred candidate's proposals
- determine the preferred candidate's ability and state of readiness to deliver the Trust
- identify any issues which should be taken into account in the grant conditions.

Other important information

Trust Deed

Once the Preferred Candidate has established the Corporate Trustee, the process of negotiating the Trust Deed will take place. Once the Trust Deed is finalised, the Corporate Trustee will formally establish the Trust (with a £10 endowment) governed by the Deed and make an application for registration with the Charity Commission and HM Revenue and Customs.

Protector

The Big Lottery Fund proposes to appoint a Protector of the Trust, an independent watchdog responsible for safeguarding public monies and ensuring the integrity of the administration of the Trust and the propriety of its procedures.

Offer of grant

If your application is successful, we will send you a formal offer of grant setting out the terms and conditions on which the grant is to be made. These will include the sample grant conditions set out on pages 17 and 18. Any correspondence you receive in advance of a formal offer of grant should not be taken as an indication that we have made a firm commitment to your application. If you start work on your proposals before a formal offer of grant is made, you do so at your own risk and there will be no guarantee that you will receive funding.

Public Announcement

We are required by law to tell the public about the grants that we make and as part of this process we will publicise your grant.

Monitoring and reporting

National Lottery funds are public money so we will monitor the management and success of the Trust, to assure Parliament and the public that Lottery proceeds are being properly used.

Waiver of copyright

We ask applicants to waive any copyright in their proposal. We reserve the right to pass contact details of candidates to other candidates with a view to facilitating the formation of a consortium.

Confidentiality

We will not disclose any details of the proposal to the press or public until after the closing date for proposals. After that date, we may make public information such as the name of your organisation, your key partners and the broad nature of your proposal. The details of your proposal will not be disclosed except in confidence to our advisers and as required by statute.

Frivolous and contentious proposals

We reserve the right to declare ineligible any proposal which is of a frivolous or contentious nature, such that it stands no reasonable prospect of success.

Right to vary these requirements

We reserve the right to vary these requirements in light of our experience.

Branding

The Trustee will need to enter into a licensing agreement for use of Big Lottery Fund branding marks where appropriate.

Media

The Trustee will need to enter into a media protocol with the Big Lottery Fund.

Complaints

If you have any complaints, please contact us as soon as possible so that we can investigate quickly and not cause a significant delay to the development of the Trust.

We have produced a leaflet called 'Making a complaint' which is available on our website, www.biglotteryfund.org.uk

This leaflet tells you about the complaints procedure and what you can complain about.

You cannot use the complaints procedure to appeal against our decision on selecting a Preferred Candidate or making a grant if we have followed our decision-making process correctly.

Data Protection

We will use the information you give us during assessment and during the life of your grant (if awarded) to administer and analyse grants and for our own research purposes. We may give copies of all or some of this information to individuals and organisations we consult when assessing applications, administering the programme, monitoring grants and evaluating funding processes and impacts. These organisations may include accountants, external evaluators and other organisations or groups involved in delivering the project.

We may share information with organisations and individuals with a legitimate interest in Lottery applications and grants or specific funding programmes. We have a duty to protect public funds and for that reason we may also share information with other Lottery distributors, government departments, organisations providing matched funding or for the prevention and detection of crime.

We might use personal information provided by you in order to conduct appropriate identity checks. Personal information that you provide may be disclosed to a credit reference or fraud prevention agency, which may keep a record of that information.

We might use the data you provide for research purposes. We recognise the need to maintain the confidentiality of vulnerable groups and their details will not be made public in any way, except as required by law.

Freedom of Information Act

The Freedom of Information Act 2000 gives members of the public the right to request any information that we hold. This includes information received from third parties, such as, although not limited to grant applicants, grant holders, contractors and people making a complaint.

If information is requested under the Freedom of Information Act we will release it, subject to exemptions, although we may choose to consult with you first. If you think that information you are providing may be exempt from release if requested, you should let us know when you apply.

How to contact us

Enquiries

Email: biglocaltrust@biglotteryfund.org.uk

Phone: 0845 4 10 20 30

Text phone: 0845 6 02 16 59

Submission of proposals

Please send your proposal to:

Big Local Trust
Big Lottery Fund
Apex House
3 Embassy Drive
Edgbaston
Birmingham
B15 1TR

We must receive your proposal **no later than 2pm on Thursday 23 September 2010.**

Standard conditions of grant

1. The Objects of the Charity may not be amended or varied. Neither the powers of the Trustee nor the identity of the Trustee may be altered or varied by or at the instance of the Trustee without the consent of the Fund and the Protector. If, on a material change in the purposes or trusteeship of the Charity, or on a breach of any of these Conditions, the Fund reasonably forms the view that the Grant is not likely to be used substantially for the purposes for which it was provided, or not in accordance with these Conditions, the Fund is entitled to the repayment of the whole or part of the Grant.
2. In the event of any actual or proposed change by or at the instance of the Trustee in the purposes or the trusteeship of the Charity, the Fund must be notified in writing as soon as possible and the Trustee must supply such further information as the Fund may reasonably require in order to consider whether to exercise its right to demand the repayment of the whole or part of the Grant.
3. In the event that any part of the Grant is not required for investment, or is left uninvested without good reason for more than 3 months, the Fund may demand its return.
4.
 - 4.1 The Trustee must supply to the Fund at a frequency to be decided by the Fund but at least annually reports on the distribution of income and such further accounts and other information as the Fund shall reasonably require in order to monitor the application of funds it receives from the National Lottery and satisfy itself that the conditions of the Grant have been and continue to be met. Such reports are to be provided in accordance with guidance and in a format to be set from time to time by the Fund.
 - 4.2 The Trustee must supply to the Protector at least every three months reports on the distribution of income and such further accounts and other information (including information on the investments of the Charity) as the Protector shall reasonably require in order to enable the Protector to carry out his duties.
5.
 - 5.1 In addition to the Trustee's duty under the Trust Deed to have the accounts of the Charity audited, the Fund shall have the right to appoint an independent auditor (qualified to conduct and audit under section 43 of the Act) conduct an audit of the Charity's accounts and report the findings of the audit to the Fund. The Fund shall be responsible for meeting the costs of an independent auditor appointed under this paragraph.
 - 5.2 For the purpose of an examination of the Fund's accounts or any examination, pursuant to section 6(1) of the National Audit Act 1983, of the economy, efficiency and effectiveness, with which the Fund or the Trustee have used their respective resources, the Trustee shall:
 - 5.2.1 permit the Comptroller and Auditor General (CAG), his staff at the National Audit Office and agents and advisers to examine such documents as he may reasonably require which are owned, held or are otherwise within the control of the Trustee; and
 - 5.2.2 produce such oral or written explanations, as the CAG considers necessary.
 - 5.3 In addition to complying with the law, the accounts of the Charity shall contain such further information and be in such format as the Fund may require. The accounts of the Charity shall be delivered to the Fund within six months of the end of the accounting period of the Charity.

6. The Fund shall be entitled to repayment of the whole of the grant in any of the following circumstances:
 - 6.1 The Trustee ceases to operate, is declared insolvent or is placed into receivership (other than a receiver or manager appointed under the Act) or liquidation;
 - 6.2 The Trustee fails, in any year other than during the 24 months following execution of the Trust Deed, to apply the income arising from the Trust Fund in furtherance of the Objects;
 - 6.3 The Trustee deals with or disposes of the whole or any part of the Trust Fund in an unauthorised manner;
 - 6.4 The application for the Grant was completed fraudulently, or was incorrect or misleading in any material way; and/or
 - 6.5 The Trustee (or any Director or employee) has acted fraudulently or negligently in connection with the formation of the Charity, the investment of the Grant or the establishment and maintenance of its working procedures.
7. Any agreement by the Fund to provide funds to the Trustee can only be guaranteed whilst the Fund continue to be satisfied that, taking into account the sums allocated to them within the National Lottery Distribution Fund, and the Fund's determination of relative priorities among all grant applicants, sufficient funds remain available to provide funds to the Trustee.
8. Whenever the Trustee has used capital of the Trust Fund representing the Grant in acquiring leasehold land or buildings for use for the administrative purposes of the Charity, the property in question is not to be disposed of without the written consent of the Fund and the Protector.
9. Whenever the Trustee seeks to procure goods, services or works for the purposes of the Charity it must, unless the value of a particular contract is worth less than £ 10,000 or its Index Linked Amount, apply Competitive Tendering save where there are exceptional circumstances which make this inappropriate or the value of the goods, services or works are such that the cost and effort of Competitive Tendering would be disproportionate to the benefits which Competitive Tendering is designed to achieve. Unless the value of a particular contract is worth less than £ 10,000 or its Index Linked Amount the Trustee shall consult with the Protector where it is considering the disapplication of Competitive Tendering for the procurement of goods, services or works for the purposes of the Charity.
10. Awards made in pursuance of the Objects shall be evidenced in a written agreement between the Trustee and the award recipient the terms of which shall include provision for the repayment of the amount of the award to the Trustee in such circumstances as the Trustee shall think fit.
11. Where the Trustee becomes aware that any of the circumstances outlined in Conditions 3, or 8 has occurred, or Conditions 9 or 10 have been breached, it shall immediately report the matter to the Fund and the Protector.
12. All awards made by the Trustee must be acknowledged in any publicity or publications as being funded by the National Lottery through the Big Lottery Fund in accordance with the terms of a protocol which shall not be varied without the Fund's consent.