John Ellerman Foundation Current Application Form

This document outlines the questions asked and data that is requested at the 1st and 2nd stages of the application process for our Main Grants programme.

1st Stage Application Form

The **1st stage application form** has 5 sections:

- **Organisation Details** – guidance on page 1 of this document
- **Your Application** – guidance on pages 2 – 3 of this document
- **Financial Information** – guidance on page 4 of this document
- **Diversity, Equity and Inclusion (DEI)** – guidance on pages 4 - 15 of this document
- **Privacy Notice** – guidance on page 15 of this document

This document is intended as a guide to the application forms only. Please do not submit this document as your application.

In this document questions are shown in left-hand column and options you can select from drop down boxes are shown in the right-hand column. Text in italics shows supporting guidance.

You can access the online application portal through our website at the following address: https://ellerman.org.uk/apply-for-funding/how-to-apply

This document shows questions on the online application which include *an asterisk (*), this indicates that they are required, and you will not be able to submit the form without filling them in.*

Please <u>contact us</u> if you have any remaining questions related to the application procedures at John Ellerman Foundation.

Adjustments	
If you need any adjustments to be made to support you to fill this form out, then let us know and we will try our best to accommodate this. For example, if English is not your first language or if you have a visual impairment and cannot view the form, please let us know. You can find our contact details here: <u>ellerman.org.uk/contact-us</u>. If there is anything else you would like us to know about your access needs when considering this application, please also make a note here.	
Adjustments you need	
Section 1: Organisation Details:	
1. Organisation Name *	
2. Organisation Legal Name if Different	

3. Address: *
    a. Number and Street
    b. Town/City
    c. Postcode	

4. Telephone Number*	
5. Website Address *	
6. Organisation Type: *	a. UK Registered Charity b. Community Interest Company c. Company Limited by Guarantee d. Fiscal Hosting e. Other

7. Charity Registration Number*	*N.B. This field will only appear if your organisation type is UK Registered Charity.*
7. Company Registration Number*	*N.B. This field will only appear if your organisation type is not a UK Registered Charity.*
8. If your organisation is not a registered charity, please explain your legal structure and why it has been adopted, and how this better enables the delivery of your charitable objectives.	*N.B. This field will only appear if your organisation type is not a UK Registered Charity.* *Total words: 250*

Primary Contact Details:	
To enter contact details, please click on the '+Add new' link. Only one primary contact can be added. You will receive an error message if you attempt to add more than one primary contact.	
1. First Name*	
2. Last Name*	
3. Email Address*	
4. Contact Telephone Number*	
5. Job Title*	

Section 2: Your Application:	
1. In order of their relevance to your organisation's work, please select the thematic areas from our strategy from the list below which best fits your proposal.* Please note that you only need to select one area, but you may select up to four if they are relevant. To select another area, open the drop-down list again and click on the area you'd like to select.	- [Triple crisis] Tackling the triple planetary crisis of climate change, pollution and nature loss - [Political equality] Building greater trust and connection, reducing polarisation in society and increasing the levels of participation and influence in the political process (which is sometimes referred to as political equality) - [New economies] Promoting the development and adoption of economic models and systems that support people and planet and reduce wealth inequalities - [Equity and justice] Advancing equity and justice for marginalised communities impacted by these issues
2. In what region(s) will your proposed work have an impact? *	- England - Wales

	- Scotland - Northern Ireland - UK-wide - UK Overseas Territories - UKOTS/Anguilla - UKOTS/Ascension Island - UKOTS/Bermuda - UKOTs/British Antarctic Territory - UKOTS/British Indian Ocean Territory/Chagos Archipelago - UKOTS/British Virgin Islands - UKOTS/Cayman Islands - UKOTS/Cyprus Sovereign Base Area - UKOTS/Falkland Islands - UKOTS/Gibraltar - UKOTS/Montserrat - UKOTS/Pitcairn Islands - UKOTS/St. Helena - UKOTS/South Georgia & the South Sandwich Islands - UKOTS/Tristan da Cunha - UKOTS/Turks & Caicos Islands
3. Please tell us how much you are applying for. *	*(N.B. All requested amounts are in £ sterling. Enter numerical value only, no spaces or commas.) We accept applications for a maximum of £180k over up to five years. We provide funding of up to a maximum of £60k per year. An organisation applying for £180k would need to request this funding over a minimum of three years. You cannot request £300k over five years.*
4. How many months would your requested funding cover?	*Describe in months e.g. 2 years is 24 months. The maximum grant length we can consider is 60 months.*
5. Please say what the grant will be spent on (e.g. CEO salary / core costs.) *	*Total words: 50*

6. Please complete a two A4 page proposal using the following headings:

- A brief summary of your organisation's aims and activities, including demonstrating that you are a well-run organisation.
- Please share how your work relates to one or more of the following: tackling the triple planetary threat of climate change, pollution and nature loss; building greater trust and connection, reducing polarisation in society and increasing the levels of participation and influence in the political process; promoting the development and adoption of economic models and systems that support people and planet and reduce wealth inequalities; and/or advancing equity and justice for marginalised communities impacted by these issues

advancing equity and justice for marginalised communities impacted by these issues. • Please outline your approach to changemaking and advancing justice through the active involvement of individuals and communities with personal or direct experience of the issues your work relates to. • What you would like us to fund and why you are well placed to do this work	
Once you have completed your 1st stage proposal, please upload the document using the link below. Click on the grey box to select your document to upload.	Accepts files in word, Excel and PDF format

Section 3: Financial Information:	
1. Annual income from your latest financial accounts *	*Please enter the exact total annual income figure.*
2. Amount in unrestricted reserves from your latest financial accounts. (Are you operating within your reserves policy? If not, please explain why in the Additional Financial Information section below.*)	
3. Please enter the financial year the figures provided above relate to. *	*e.g. 2024-25.*
4. Please upload a copy of your annual report and financial statements from the previous financial year, in draft form if necessary. (If you do not yet have a draft available, please reach out to the team to discuss alternatives.)*	*Accepts files in word, Excel and PDF format*
5. Your management accounts for the current financial year. This should include your projected income and expenditure for the whole year.*	*Accepts files in word, Excel and PDF format*
6. What is your Full-Time Equivalent (FTE) staffing level?	*e.g. 5 FTE staff*
7. Additional financial information: If there is something unusual in your accounts (e.g. a significant surplus or deficit, or high or low reserves **outside of your reserves policy**), please explain this briefly.	*Total words: 500*

Section 4: Diversity, Equity and Inclusion (DEI)
What is Diversity, Equity and Inclusion (DEI)? 'Diversity' refers to the various aspects of the differences between people. This can include gender, race and ethnicity, faith, sexual orientation, disability, age and gender. 'Equity' is about fairness and justice. 'Inclusion' is about helping people feel valued. It's also about making sure they can take part in decision-making processes. For more information on the Foundation's

approach to DEI, please refer to our <u>Diversity, Equity and Inclusion policy</u>.

Why are we asking these questions?

We want to get better at understanding the impact of our funding on diversity, equity and inclusion. To support this, we have adopted the DEI Data Standard, which has been produced by the DEI Data Group. This was created by an independent working group of funders who believe that without an effective framework to capture DEI data, there can be no effective action to identify and target funding to address structural inequalities. You can find out more about the group and the standard here: https://www.funderscollaborativehub.org.uk/collaborations/dei-data-standard

The questions in this section categorises groups of people in line with the DEI Data Standard. We recognise that the categories used may not fully capture the nuances of people's individual identities. However, we believe that by using standardised terms, we can collect, report and monitor information in a consistent way, and as part of a collective of funders, and this enables us to gather data to support our aims to identify and address structural inequality.

Please note that this version of the DEI Data Standard may be slightly different to versions you've filled out with other grantmakers – this is likely to be the case because we are asking from the perspective of being a core costs grantmaker, and others will be applying this questionnaire based on them being a project and/or capital costs grantmaker.

How We'll Use Your Information

We would like to ask some questions about the people being supported and your organisation, to help us to understand our applicants and funding better. This information is being used to inform our own monitoring and strategy and **will not** be used to help us decide whether or not to award you a grant. There is no judgment or preference for particular responses. The aggregated and anonymised data from all applicants will be used as a part of our own DEI reporting but will not identify individual organisations. It may also be shared to inform the wider DEI Data Standard reporting.

Assessing Your Application:

We will not use your answers in this section on DEI to assess your application

Please select 'True' to show you understand and acknowledge the above statement. *	- True

Communities Your Organisation Supports

We are interested in learning more about the people and communities that your organisation currently supports.

Does a majority (75% or more) of the people your organisation supports have a shared identity/community/characteristic?	- Yes - No

(N.B. This section will only appear if you select 'Yes' to the question above.)

Please select the group that represents a majority (75% or more) of people that your organisation supports. You may select multiple groups to reflect the intersectional focuses of your organisation (e.g. Black + Mental Health + Young People + Women and Girls).

For every group that you select, please select a further sub-category from the drop down box that will appear immediately below, if applicable. Leave groups blank if they do not apply to your organisation.

The answers provided will not be used as part of our assessment.

Communities experiencing ethnic or racial inequity, discrimination, or inequality
Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

Communities that experience inequity as a result of their race or ethnic group, which may be related to their national/geographical origin, skin colours, and other identities. This can also be referred to as "Black, Asian and Minority Ethnic" or BAME	<None> - Communities experiencing ethnic or racial inequity - Black / African / Caribbean / Black British - Mixed (White and Black, White and Asian, Any other mixed / multiple ethnic background - Asian / Asian British, Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background - Arab - Jewish - Gypsy, Roma and Traveller communities - Any other ethnic group

Faith communities
Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

Active observers/believers of a religious faith or spiritual belief	<None> - Religion or Belief - Catholic - Protestant - Other Christian denominations - Buddhist - Hindu - Jewish - Muslim - Sikh - Atheist

| | - Agnostic |
| | - Other faith and beliefs |

Migrants

Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

Groups who are first-generation and/or recent migrants to the UK	<None> - Migrants - Asylum Seekers - Refugees - Undocumented People - Other Migrants

Disabled People

Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

People including those that identify as Disabled and those that have impairments which have a long-term impact on quality of life, and experience injustice as a result of social, political or physical barriers to participation	<None> - Disabled People - Mental Health - Long-standing Illness or Health Condition - Mobility Impairments - Visual Impairment / Partial Sight / Sight Loss - Deaf / Hard of Hearing / Hearing Loss - Speech Impairment - Multiple Physical Impairment - Learning Difficulty - Neurodiverse Cognitive Difference - Other Type of Disability or Impairment - Learning disability

Younger People (under 25)

Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

People under 25	<None> - Younger People - Under 2 years of age - 2-7 - 8-15 - 16-18 - 19-25

Older People (60 and older)

Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.

People aged 60 and over	<None> - Older People (60 and older)
Women and Girls Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.	
People who identify and live as women and girls	<None> - Women and girls
LGBT+ People Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.	
People with gender, sex and relationship diversity including but not limited to Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, Agender people	<None> - LGBT+ People - Bisexual Men - Bisexual women - Gay men - Lesbian / gay women - Non-binary people - Other LGBT+ people - Trans men - Trans women - Trans people
People who are educationally or economically disadvantaged Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable.	
People who identify as from an economically and/ or educationally disadvantaged background, including working class backgrounds, with long-term impact on their life outcomes; also, people currently experiencing financial hardship	<None> People who are educationally or economically disadvantaged
Specific groups that are not included already Please select 'True' if the majority (75% or more) of the people you support identify with this group. Leave blank if not applicable. *N.B. The following free text field will only appear if you select 'True'.*	
Please tell us which groups these are. Examples include men and boys, care experienced young people, carers, people	*Free text*

recovering from alcohol addiction, sex workers, people whose first language is not English or who have problems reading. NB: If you are working in Wales with Welsh language speaking communities and individuals, please use this category to indicate this in the text box below.	

Your Organisation's Mission and Purpose

We are interested in your organisation's charitable purpose, and who you have been set up to work with and support.

The answers provided will not be used as part of our assessment.

Is there a specific community that your organisation is dedicated to serving? This might be referenced in your organisations' governing documents, strategy or public-facing materials.	- Yes - No

N.B. This section will only appear if you select "Yes" to the question above.

Please select below all groups of people that your organisation was set up to support.

For every community you select, please select a further sub-category from the dropdown box that will appear below, if applicable. Leave categories blank if they do not apply to your organisation.

Communities experiencing ethnic or racial inequity, discrimination, or inequality
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

Communities that experience inequity as a result of their race or ethnic group, which may be related to their national/geographical origin, skin colours, and other identities. This can also be referred to as "Black, Asian and Minority Ethnic" or BAME	<None> - Communities experiencing ethnic or racial inequity - Black / African / Caribbean / Black British - Mixed (White and Black, White and Asian, Any other mixed / multiple ethnic background - Asian / Asian British, Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background - Arab - Jewish - Gypsy, Roma and Traveller communities - Any other ethnic group

Faith communities
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

Active observers/believers of a religious faith or spiritual belief	<None> - Religion or Belief - Catholic - Protestant - Other Christian denominations - Buddhist - Hindu - Jewish - Muslim - Sikh - Atheist - Agnostic - Other faith and belief

Migrant

Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

Groups who are first-generation and/or recent migrants to the UK	<None> - Migrants - Asylum Seekers - Refugees - Undocumented People - Other Migrants

Disabled People

Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

People including those that identify as Disabled and those that have impairments which have a long-term impact on quality of life, and experience injustice as a result of social, political or physical barriers to participation	<None> - Disabled People - Mental Health - Long-standing Illness or Health Condition - Mobility Impairments - Visual Impairment / Partial Sight / Sight Loss - Deaf / Hard of Hearing / Hearing Loss - Speech Impairment - Multiple Physical Impairment - Learning Difficulty - Neurodiverse Cognitive Difference - Other Type of Disability or Impairment - Learning disability

Younger People (under 25)

Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

People under 25	<None>

	- Younger People
	- Under 2 years of age
	- 2-7
	- 8-15
	- 16-18
	- 19-25

Older People (60 and older)
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

| *People aged 60 and over* | \<None\> |
| | - Older People (60 and older) |

Women and Girls
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

| *People who identify and live as women and girls* | \<None\> |
| | - Women and girls |

LGBT+ People
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

People with gender, sex and relationship diversity including but not limited to Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, Agender people	\<None\>
	- LGBT+ People
	- Bisexual Men
	- Bisexual women
	- Gay men
	- Lesbian / gay women
	- Trans men
	- Trans women
	- Trans people
	- Non-binary people
	- Other LGBT+ people

People who are educationally or economically disadvantaged
Please select 'True' if your organisation was set up to support this community. Leave blank if not applicable.

| *People who identify as from an economically and/ or educationally disadvantaged background, including working class backgrounds, with long-term impact on their life outcomes; also, people currently experiencing financial hardship* | \<None\> |
| | - People who are educationally or economically disadvantaged |

Specific groups that are not included already

Please select 'True' if your organisation was set up to support this community. If you selected 'True', please tell us which groups these are. Leave blank if not applicable.

N.B. The following free text field will only appear if you select 'True'.

Please tell us which groups these are. Examples include men and boys, care experienced young people, carers, people recovering from alcohol addiction, sex workers, people whose first language is not English or who have problems reading. NB: If you are working in Wales with Welsh language speaking communities and individuals, please use this category to indicate this in the text box below.	*Free text*

Leadership of the Organisation

We'd like to understand more about the leadership of the organisations that we're supporting. These questions will not be used as part of our funding decision.

We'd like to understand if the majority of your organisation's leadership have a shared identity. By 'majority', we mean around 75% or more of your Board of Trustee or management committee AND 50% or more of senior staff self-identify with a specific community or characteristic.

Does a majority of your organisation's leadership self-identify with a specific community or characteristic?	- Yes - No - Prefer Not to Say

(N.B. This section will only appear if you select Yes to the question above. If you select No or Prefer Not to Say, you will see the text 'Please continue to Section 5: Privacy Notice'.

Please select from the categories below any groups that a majority of your leadership self-identifies with. You may select from multiple categories to reflect the makeup of your leadership, e.g.: Black + Mental Health + Young People + Women and Girls.

For every group that you select please select a further sub-category from the drop-down box that will appear immediately below, if applicable. Leave categories blank if they do not apply to your organisation.

Communities experiencing ethnic or racial inequity, discrimination, or inequality

Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

Communities that experience inequity as a result of their race or ethnic group, which may	<None> - Black / African / Caribbean / Black British

be related to their national / geographical origin, skin colours, and other identities. This can also be referred to as "Black, Asian and Minority Ethnic" or BAME	- Mixed (White and Black, White and Asian, Any other mixed / multiple ethnic background - Asian / Asian British, Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background - Arab - Jewish - Gypsy, Roma and Traveller communities - Any other ethnic group - Communities experience ethnic or racial inequity

Faith communities
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

Active observers/believers of a religious faith or spiritual belief	<None> - Catholic - Protestant - Other Christian denominations - Buddhist - Hindu - Jewish - Muslim - Sikh - Atheist - Agnostic - Other faith and belief

Migrants
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

Groups who are first-generation and/or recent migrants to the UK	<None> - Migrants - Asylum Seekers - Refugees - Undocumented People - Other Migrants

Disabled People
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

Including those that identify as Disabled and those that have impairments which have a long-term impact on quality of life, and	<None> - Disabled people - Mental Health - Long-standing Illness or Health Condition

experience injustice as a result of social, political or physical barriers to participation	- Mobility Impairments - Visual Impairment / Partial Sight / Sight Loss - Deaf / Hard of Hearing / Hearing Loss - Speech Impairment - Multiple Physical Impairment - Learning Difficulty - Neurodiverse Cognitive Difference - Other Type of Disability or Impairment - Learning disability

Young People
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

People under 25	<None> - Younger people - 16-18 - 19-25

Older people (Over 60)
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

People aged 60 and over	<None> - Older People (60 and older)

Women and Girls
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

People who identify and live as women and girls	<None> - Women and Girls

LGBT+
Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.

People with gender, sex and relationship diversity including but not limited to Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, Agender people	<None> - LGBT+ - Bisexual Men - Bisexual women - Gay men - Lesbian / gay women - Trans men - Trans women - Trans people - Non-binary people - Other LGBT+ people

People who are educationally or economically disadvantage Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable.	
Identify as from an economically and/ or educationally disadvantaged background, including working class backgrounds, with long-term impact on their life outcomes; also, people currently experiencing financial hardship	\<None\> - People who are educationally or economically disadvantaged
Specific groups that are not included already Please select 'True' if the majority of the people who lead or make the key decisions (usually senior management and Trustees) identify with this group. Leave blank if not applicable. *N.B. The following free text field will only appear if you select 'True'.*	
Please tell us which groups these are. Examples include men and boys, care experienced young people, carers, people recovering from alcohol addiction, sex workers, people whose first language is not English or who have problems reading. NB: If you are working in Wales with Welsh language speaking communities and individuals, please use this category to indicate this in the text box below.	*Free text*

Section 5: Privacy Notice:	
You have provided us with information, including some personal data, in connection with your grant application and you may do so again in the future. We take the security of your personal data very seriously and we are required to make you aware of our policies about our use of your personal data. Our privacy notice for applicants and grantees explains how, when and why we collect your personal data. This policy can be found on <u>our website</u>, where it may be updated from time to time.	
Privacy Notice Confirmation Please confirm you have reviewed this privacy notice by selecting 'True'.	- True
Declaration: I declare that the information given in this application form is true and accurate to the best of my knowledge and belief. *	- True

Please select 'True' to confirm your acceptance of this declaration.	
End of 1st Stage Application Form	