Wales for Africa grants scheme

Grant application guidance:

Completing the project profile form

Completing the project profile

Please use the profile provided with the grant application on eTenderWales. Please do not alter the format of the profile or make any changes to formulas. If any changes have been made to the format or formulas, this could make your application ineligible.

The project profile is made up of an Excel workbook with six individual spreadsheets, or tabs. You need to complete the tabs entitled 'Finances', and 'Project targets'.

This workbook is used to profile definite financial costs and targets anticipated for your project. The information you provide will form the basis of any grant award if your proposal is successful. Please spend time reading the guidance below.

Please note: if you fail to meet the requirements for <u>any</u> of the specified 'minimum score' questions in the eTenderWales online application form, assessment will stop and so this project profile will not be considered.

Cover sheet

All that needs to be entered on this sheet is your organisation's name.

Finances sheet

Please follow this step-by step guidance:

1. **Timeline**: start by typing in the quarter end dates in row 4. For example, if your project is starting in April, the end of the first quarter will be June, so type in 'June 2018'. This will show in the spreadsheet as 'Jun-18'. Continue for all the quarters that the project will run through.

   Checkpoint: Are these the same dates you have mentioned in your application? Are they within the date limits set by the funding round?

2. **Project costs**: put in all the project costs that relate to your <u>whole</u> project. If you are **applying for funding for part of a larger project, include everything relating to the** costs, even if some of the costs are being met by another funder. Some examples are given in tab 4/5, 'Finance examples'. Give as much explanation as you think an 'outsider' would need to understand what is to be paid for.

   Checkpoint: Are these items mentioned or implied in your application? Does *everything you say you're going to do have a cost in this profile?*

NB: Overheads

Projects funded through the Wales for Africa (WFA) grants scheme may only be one of your organisation's projects and services and will often use a variety of your existing resources to run successfully. There is a cost to your organisation for having these resources and because the project is using them, they are eligible project costs. Costs that are shared between the project and the organisation are called overheads or indirect costs.

If you are planning to include a contribution to overheads, these costs should either be detailed, or you can just allocate a sum equal to 15% of the total staff payment costs. We recommend this option, but if you use it we would not expect to see overheads such as rent, rates, utilities, etc, included in this section. A 'management fee' is <u>not</u> an eligible project cost.

3. **Volunteer time**: this is, in effect, a donation of time by people to your project and so counts as an 'in-kind' cost. There has to be an agreed way of measuring this, so the rates recommended by the WCVA Volunteering Unit are listed on tab 6, 'Volunteer rates'. Please use these to calculate the 'cost' of the volunteer time and give as much explanation as you think an 'outsider' would need to understand the calculation. Some examples are given in tab 4/5, 'Finance examples'.

   If a professional, such as a surveyor or accountant, is donating their <u>professional</u> time free of charge, you could use their standard advertised rates to account for the rate used – but if they are donating their time in another role, then the rate should reflect that role and not their 'day job'.

   If you're not planning to account for volunteer time, you can leave this section blank. If you are applying for funding for part of a larger project, include <u>everything</u> relating to volunteer time, even if some of the total costs are being met by another funder.

   Checkpoint: Have you mentioned in your application that volunteers will be involved? Does your application make it clear what their roles will be and are they the same as what you have listed?

4. Staff costs: please show what staff costs you are expecting to incur for each individual role. These costs should include employer's national insurance and pension contributions, if applicable; but could also represent payments to sessional staff who invoice for their services.

   If you are applying for funding for part of a larger project, include <u>everything</u> relating to the staff costs, even if some of the costs are being met by another funder. Some examples are given in tab 5, 'Finance examples'. Give as much explanation as you think an 'outsider' would need to understand what is to be paid for.

   This section should not include other staff costs such as expenses or protective clothing – those should be in the 'project costs' section. Also, if you have opted to account for overheads through a simple 15% calculation in the 'project costs' section, we would not expect to see a contribution towards shared staff resources such as IT, payroll, etc, in this section.

Please note: LIVING WAGE Foundation Rate

WCVA is a 'Living Wage Friendly funder' and expects all salaries included within the project budget to reflect the Living Wage Foundation rate, where possible. This covers any posts to be funded in full, part contributions to a staff post, sessional workers, interns or apprentices. Details of the current Living Wage Foundation rate may be found at https://www.livingwage.org.uk/

   Checkpoint: Have you mentioned these staff roles in your application? If you need to appoint new staff, have you included recruitment costs? Have you included a project administrator role? – most of the grant administration for this scheme will be online and so you'll need someone with the appropriate skills to input your project information. Does your application make it clear what the staff roles will be and are they the same as what you have listed?

5. **In-kind costs**: these represent donations to your project that you can put a value to as an 'in kind' cost. Donations of time are covered in the 'Volunteer time' section. Please calculate the 'cost' of the donated goods or services and give as much explanation as you think an 'outsider' would need to understand the calculation. Some examples are given in tab 5, 'Finance examples'. If you're not expecting any in-kind contributions, you can leave this section blank. If you are applying for funding for part of a larger project, include everything relating to in-kind costs, even if some of the total costs are being met by another funder.

   Checkpoint: Have you mentioned in your application that you will be using donated goods or services? Could this be used to help demonstrate the support you have from the community?

If you are awarded a WFA grant, we won't ask you for evidence of these costs in advance, but we may ask you for further explanations or evidence during the application assessment process; and our project monitoring visits will involve checking what has been charged to the project, including receipts, invoices, bank statements, etc, if necessary. If you have opted for the 15% overheads calculation, you will not need to provide evidence to support this.

6. **Totals:** the spreadsheet will automatically calculate the total cost of the project and the amount of those costs that are in-kind. You will need to type in the following:
   - Grant amount applied for: this is where you tell us how much you need from WFA. The remaining costs (if any) will be your actual 'match funding' contribution. If the 'Other match funding provided' box turns red, you've asked for too much!
   - Source of match funding: if you are providing some of the costs yourself, please tell us where they come from; eg from your own reserves or unrestricted funds, other funders, etc. You don't need to tell us about the in-kind match funding because this will already be covered in previous sections. If the source of your match funding is not covered by one of the dropdown options, please specify in the cell below

   Checkpoint: Have you cross referenced all the financial information to your application? Has someone else checked your calculations?

Key points to remember

- Please work out the full cost of the project and be certain that the funding package, including the WFA grant, will cover it.
- If your organisation is a charity, you must account for the grant as a restricted fund Find out more about 'restricted' funds here - http://www.charitysorp.org/media/620724/frs102_module-2.pdf
- If your organisation is not a charity, we will still expect you to keep financial records in a way that that will clearly identify the specific expenditure on the project, or the part of the project that is funded by the WASGS grant.

Project targets sheet

The third sheet in the project profile is the 'Project targets' sheet. You will need to complete this sheet to show the targets, or milestones, that will be met during the lifetime of the project.

The targets should be proportional to the size and scope of your project. Please don't feel that you must add multiple targets if your project is quite small and straightforward. Remember, the targets you enter will be used as your 'key performance indicators' if your grant application is successful: if you say the project will achieve something in a certain quarter, then if that doesn't happen, we will be asking you what went wrong.

Not every possible target will apply to your project: check what you've said in your application and make sure the profile targets are consistent with that.

Timeline: this will be automatically completed by the dates you input to the finances sheet.

When planning activities and results, please allocate time at the beginning for setting up and recruiting staff and volunteers; and at the end to close down, record outcomes and submit your final report.

The targets listed are in line with the project guidance document you have downloaded from eTenderWales. Each should have a numerical value: any description should be in the text of your application.

All profiles should include some targets in the 'General' section.

You only need to enter targets for the theme you have selected, ie Health, Lifelong learning, climate change and the environment or sustainable livelihoods.

Key points to remember
- Only targets specifically related to your project should be included.
- Cross – reference to your grant application and ask an 'outsider' to check it.
- Make sure your targets are reasonable, achievable within the timescale, and eligible for funding through WFA.