**Your application**

**Introduction**

Your applicationneeds to provide a clear, concise and compelling proposal, outlining details of your organisation and its achievements, why the work is needed and what it is expected to achieve.

Your application must demonstrate that the proposed work will enhance the quality of debate in the run up to the Scottish Election by producing non-partisan analysis and policy work addressing the key challenges that need to be addressed in relation to living standards in Scotland, and the opportunities, barriers and costs to doing so.

Key areas we are interested include public finances, taxation, public service spending, employment, living standards, transition to net zero and social security. We are particularly interested in distributional impacts on poverty and/or those living with trauma across these areas. While we expect most of the analysis will be quantitative in nature, we will consider projects that centre lived experience where this is integral to understanding the problem or the solutions.

**How to structure and format your application**

* We have provided a word count as a guide, but your application form (not including attachments) must not exceed seven A4 pages in total.
* Your application must be in Microsoft Word format.
* It must be written in Arial, font size 12. Please do not use any other font or size.
* Do use white space, bullets and standard margins.
* Do not use other formatting, e.g. underlining bold typeface or shading/highlighting, other than for the headings in this template.
* Do not add in logos, cover pages, footnotes/endnotes, hyperlinks, bibliographies.
* Keep sentences and paragraphs short, as this makes it easier to read.
* Please write in clear English, avoiding jargon and technical language and make sure you spell-check your final submission.
* Remove this page from your application before submission.
* Please email the completed application to: applications@financialfairness.org.uk. Applications for this joint call will be jointly assessed by both the abrdn Financial Fairness Trust and The Robertson Trust.

**Final application structure**

Your final application needs to provide all of the information below in one document, using the headings listed (text in italics is for guidance only and should be deleted from your final submission):

**1) Organisation name**

**2) Project summary**

*In no more than 40 words summarise the project you are applying for. We will use this as the basis for describing the project, if you are funded by us.*

**3) Year organisation established**

**4) Organisation’s legal status**

*For example, are you a registered charity, company limited by guarantee?*

**5) Number of trustees/directors on governing board**

*Please also state how many are non-executive (not paid members of staff)*

**6) Organisation summary**

*Summarise the work of your organisation. We will use this as the basis for describing your organisation, if you are funded by us. Maximum 40 words.*

**7) Organisation overview**

*This is an outline of your work including aims, main activities, track record and recent achievements, including the difference your work has made – where possible include details of how you know your work made a difference. If all of your work is not based in Scotland, please outline previous relevant work you have undertaken in Scotland. This section should provide enough detail so that someone who does not know your work is able to get an overview of what you do and your success. Maximum 400 words.*

**8) Organisation’s finances**

*Please fill in the following table from your latest set of audited/examined annual accounts*

|  |  |  |
| --- | --- | --- |
|  | Most recent year (£) | Prior Year (£) |
| Income |  |  |
| Expenditure |  |  |
| Surplus/deficit |  |  |
| Total funds |  |  |
| Net current assets/liabilities |  |  |

**9) Project need**

*What is the issue you are seeking to address? Why is it important? Why does it need to be addressed ahead of the Scottish Election? What are the barriers to change? How would change in this area lead to lasting impact? Who else is working on this issue and how are you working with them? Please don’t take up space explaining the general issues you are addressing and assume we have some understanding of the field in which you are operating. Maximum 400 words.*

**10) Project overview**

*This is an outline of the work you are seeking funding for. It should be clear what the aims and objectives of the work are and what you intend to do, including the main activities and outputs.*

*Please be clear in relation to the outputs. For example, when you state you’ll run roundtables with key stakeholders, how many roundtables and how many people will you be expecting to attend*?

*If you are applying for research, please outline your methodology. If you are submitting a separate methodological appendix, the methods outlined here must still be clear enough to be understood without it. If this is a partnership application, outline who your partners are and what they will do.*

*You should be clear how the work is focused on systemic change and why your work is likely to overcome some of the barriers to change. We are interested in ideas around policy delivery as much as policy development.*

*What is different about your approach? Is it new or imaginative? How does it involve and engage the intended beneficiaries? How does it include or share power with people with lived experience? Does it include partnerships or collaborations to help improve impact? Why do you think your approach will work? Does your organisation have the skills, experience, relationships and capacity to undertake this work?*

*Please outline your dissemination and influencing strategy, including who your key audiences are. Maximum 1,200 words.*

**11) Project outcomes**

*Outline no more than three key outcomes (the difference you hope to make) by which your work will be measured – please make sure these are outcomes you can realistically measure and they are linked to the outputs in section 11. State how you will collate data for measuring the outcomes. Maximum 300 words.*

**12) Timescale**

*How long will the project take to complete? Include when your proposed start date is.*

**13) Budget**

*You should set out in table form the funds you are requesting, itemising individual salary costs (please specify the posts for which you are seeking funding/part funding and give the breakdown for employer’s National Insurance contributions and pension), project costs and any other related costs.*

*Optional budget template, with worked examples. Please add further financial years as required*

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| *Year 1 - October 2025-March 2026* | | | | | | |
| *Staff and overheads costs* | *FTE salary* | *Time on project* | *Salary costs* | *ENIC* | *Pension @4.5%* | *Total* |
| Policy Manager,  *add name* | £52,000; 0.8; £40,000 | 5% | 2,000 | 213 | 90 | 2,303 |
| Research Officer, *add name* | £38,000; 1.0. | 50% | 19,000 | 1,994 | 855 | 21,849 |
| *Year 2 - April 2026-March 2027* | | | | | | |
| Policy Manager,  *add name* | £52,500; 0.8; £41,600 | 20% | 8,320 | 897 | 374 | 9,591 |
| Research Officer, *add name* | £39,900 | 5% | 1,995 | 213 | 90 | 2,297 |
|  | | | | *Year 1* | | *Year 2* |
| Overheads *if relevant. Please give details of what this covers (e.g. office staff costs, energy costs and premises.*  Overheads at 15% | | | | 3,622 | | 1,783 |
| *Project budget items* | | | | Year 1 | | Year 2 |
| 40 interviews with working age adults = £20 per hour x 40 incentives | | | | 800 | | 0 |
| Expert technical consultant: 10 days @£300 per day | | | | 2,100 | | 900 |
| Travel for in person interviews (20 out of 40 interviews) £50 per trip. | | | | 1,000 | | 1,000 |
| Transcription: 40 x 1 hour @£70 per hr | | | | 0 | | 2,800 |
| YouGov survey: 2,000 adults; 15 Qs | | | | 6,000 | | 0 |
| Event hall rental @450 per rental | | | | 0 | | 1,350 |
| Report publication costs | | | | 0 | | 2,215 |
| Launch event | | | | 0 | | 1,500 |
| Total budget | | | | 37,675 | | 23,437 |
| Total all years | | | | 61,112 | | |

*Please do not give day rates, unless this is for short-term consultants.*

*If the funding is for existing staff, please give job title and the name of the person in the post.*

**14) Amount requested**

*How much you are seeking from us. If you are applying to others, state who they are and how much is being sought/has been secured.*

**15)****Breakdown of staff time**

*We need a breakdown to understand how much time is being spent by staff on the key activities. For example, how many days for staff (and which staff) on the literature review, data analysis, engagement, communications. Below is an example.*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Activities (give detail as required – examples below)** | **Director** | **Head of comms** | **Research officer** | **Total** |
| Expert advisory board |  |  |  |  |
| Rapid literature review |  |  |  |  |
| Data review |  |  |  |  |
| Advisory group meetings |  |  |  |  |
| Interim report and dissemination |  |  |  |  |
| Interviews  40 interviews with working-age adults. Recruitment, development of research materials, ethics, fieldwork, coding, analysis and writing up. |  |  |  |  |
| Advocacy (e.g. meetings with politicians, regulators, employers) |  |  |  |  |
| Seminar with up to X stakeholders to develop strategies for taking work forward |  |  |  |  |
| Policy development |  |  |  |  |
| Focus group (x2) to reflect on policy work |  |  |  |  |
| Final report writing and dissemination |  |  |  |  |
| Influencing in parliament |  |  |  |  |
| Round table with public and private sector stakeholders |  |  |  |  |
| **Total** |  |  |  |  |

**Additional documentation**

You will also need to send us (electronically with your final application) the following documents:

**1) Administrative details**

In a separate document provide your:

a) Organisation’s address including postcode

b) Organisation’s website

c) Organisation’s Twitter account

d) Lead applicant’s title, which you would like us to use (eg Mr, Ms, Professor), name, job title, email address and telephone number (and mobile number if available)

*(This is the name of the person leading this application)*

e) Secondary applicant’s title, which you would like us to use (eg Mr, Ms, Professor), name, job title, email address and telephone number *(Somebody we can contact if the lead applicant is unavailable).*

**2) Constitution**

*A copy of your organisation’s governing document.*

**3) Annual accounts**

*Please attach your latest annual accounts when submitting your final application.*

**4) Budget**

*Your organisation’s budget for the current financial year, highlighting what income has been secured to date.*

**5) Board meeting minutes**

*The last set of minutes of your governing body.*

**6) Research methodology**

*If applying for research (even if this is only for part of the grant) please outline in more detail your research methodology if you are unable to provide sufficient detail in the main application. This document should be no more than eight pages.*