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**Grant Application Form**

**SINGLE ADVICE FUND**

**Please refer to the Guidance Notes when you are completing this application form.**

**Completed applications must be returned by 5pm on Thursday 17 October 2024.**

**Late applications will not be accepted.**

**Section One – What You Are Applying For**

(Please note: A separate application form must be completed for each Service for which you are applying.)

Please tick ONE of the following only. This application relates to:

**OPPORTUNITY 1: Regional Social Welfare Information and Advice Service**

|  |  |  |
| --- | --- | --- |
|  | **Local Authorities Covered** | **Tick as applicable** |
| 1 | Merthyr; RCT, Bridgend |  |
| 2 | Carmarthenshire; Ceredigion; Pembrokeshire; Powys |  |
| 3 | Conwy; Denbighshire; Flintshire; Gwynedd; Isle of Anglesey; Wrexham |  |
| 4 | Blaenau Gwent; Caerphilly; Monmouthshire; Newport; Torfaen |  |
| 5 | Cardiff; Vale of Glamorgan |  |
| 6 | Neath Port Talbot; Swansea |  |

**OPPORTUNITY 2: Pan-Wales Remote Advice Service**

|  |  |  |
| --- | --- | --- |
|  | **Local Authorities Covered** | **Tick as applicable** |
| 7 | National |  |

**OPPORTUNITY 3: Standalone service – Regional Grant**

|  |  |  |
| --- | --- | --- |
|  | **Local Authorities Covered** | **Tick as applicable** |
| 8 | Please state which standalone region here |  |

**Section Two – Organisation/ Lead Provider Details**

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| Is this a collaborative or an individual application?  Please provide full contact details for your organisation. In a collaborative application (with delivery involving partner organisations), contact details of the Lead Organisation should be provided here. |

**Section Three – Partner Organisations (Collaborative Applications Only)**

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| If this is a collaborative application, please provide full contact details for the other organisation/s involved in this project who will receive grants funds. |

**Section Four – Quality Assurance**

Each organisation who will be **directly delivering** the funded advice services through Opportunity 1 and Opportunity 2 is required to provide:

* 1. evidence of the advice Quality Standard that they hold, **and** confirmation of the date at which their organisation will have to reapply for this advice Quality Standard; and
  2. a statement to confirm that they are **impartial** and have the ability to always **act in the** **best interest** of the people who will be receiving the free to client funded advice services.
  3. if a provider will be delivering **debt** advice services, evidence that they are Financial Conduct Authority (FCA) regulated, or confirmation that they are exempted from having to be FCA regulated.
  4. If applying for a grant through Opportunity 3, a provider does not have to hold an advice Quality Standard at the date of commencement of the funded services i.e. 01 April 2025. A successful Bidder will be expected to provide evidence that they are working towards this and that they will hold an appropriate Quality Standard within six-months of the date of the commencement of the funded service, i.e., 01 October 2025

|  |
| --- |
| Please confirm that you have attached the above evidence requested under a), b) and (if applicable) c) or d) above (for every organisation directly delivering within the application proposal).  **Yes/No** (delete as appropriate) |

If any directly delivering organisation does not currently hold either an advice Quality Standard or FCA authorised, please provide robust evidence here that these requirements will be met by the grant start date, or within 6 months if applying through Opportunity 3.

**Section Five – Expected Start Date of Service Delivery**

Please provide confirmation by ticking the box below that you (and your delivery partners in a collaborative application) will be able to commence the delivery of the free to client funded services on the 1 April 2025.

**Yes, I can commence on the 1 April 2025.**

**Section Six – About the Proposed Services**

Please answer the below questions about the Service that you are proposing to deliver. Each question has a maximum word count and where a question will be scored, the relevant score weighting is set out after the question.

**Question 1 – Prior Experience**

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| --- |
| Clearly set out the experience and proven ability of the provider(s) to deliver free to client social welfare rights-based information and advice services.  Provider(s) are also asked to explain their previous experience of involvement in collaborative service delivery models.    (Maximum of 1000 words) ***Score maximum of 20 points.*** |

**Question 2 – Proposed Service Delivery**

|  |
| --- |
| If applying through Opportunity 1 and Opportunity 2, Please explain and evidence how your proposed service delivery model will   1. be seamless and fully integrated for people who have advice needs; 2. be focussed on both prevention and responding to emergency crises; 3. be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring; 4. in the case of regional services, able to reach into the heart of local communities, ensuring the funded services are well known and easily accessible OR in the case of the pan-Wales remote service, able to achieve a sufficient profile to ensure that the service is well known and easily accessible; 5. demonstrate meaningful service delivery links with statutory primary care delivery and other well-being services within the voluntary and community sectors; 6. target those people or groups whose characteristics or circumstances make them more likely to be in most need of advice and encourage early access by them to the funded service, demonstrating innovation in reaching people who may not usually access mainstream advice services. 7. contribute to and engage with the Regional Advice Network and any advice network partnerships established in their respective regions/nationally   If applying through Opportunity 3, Please explain and evidence how your proposed service delivery model will   1. be seamless and fully integrated for people who have advice needs; 2. be focussed on both prevention and responding to emergency crises; 3. be designed to ensure people accessing information and advice services are given tangible opportunities to develop their knowledge, capability and skills with the aim of, as far as practical, improving their resilience to similar problems reoccurring; 4. able to reach into the heart of local communities, ensuring the funded services are well known and easily accessible 5. target those people or groups whose characteristics or circumstances make them more likely to be in most need of advice and encourage early access by them to the funded service, demonstrating innovation in reaching people who may not usually access mainstream advice services. 6. contribute to and engage with the Regional Advice Network and any advice network partnerships established in their respective regions/nationally   (Maximum of 1500 words) ***Score maximum of 25 points.*** |

**Question 3 – Service Planning and Co-ordination**

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| --- |
| If applying through Opportunity 1, Opportunity 2 or Opportunity 3, Please explain:   1. the robustness of the planning assumptions used to predict the numbers accessing the proposed service/s, as set out in the Minimum Volume Expectations table in Question 6 below; 2. how the planning of the funded service will complement other advice services already operating within the service area; 3. how service delivery will be co-ordinated to ensure equal and consistent access to the funded service/s across the region or across Wales, as appropriate; 4. how the planning of the information and advice service will ensure the funded service will be delivered in accordance with the specific needs of local communities; 5. how a system of review and innovation will drive forward continuous improvements in effectiveness and efficiency;   (Maximum of 1500 words) ***Score maximum of 25 points.*** |

**Question 4 - Welsh Language and Community Languages**

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| --- |
| If applying through Opportunity 1. Opportunity 2 or Opportunity 3, Please clearly explain how your proposed service delivery model will ensure there will be consistent and equal access to people accessing funded services who wish to do so in the medium of Welsh, or in any of the community languages.  (Maximum of 500 words) ***Score maximum of 5 points.*** |

**Question 5 - Person-centred Services that Contribute to Wellbeing**

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| --- |
| If applying through Opportunity 1, Opportunity 2 or Opportunity 3, Welsh Government wishes to support advice services that offer services aligned to the Wellbeing of Future Generations Act 2015. Please highlight the ways in which your proposed service will constitute a person-centred service that will contribute to well-being, ensuring that you include reference to how the service will meet each of the following well-being goals:   1. A prosperous Wales 2. A resilient Wales 3. A healthier Wales 4. A more equal Wales 5. A Wales of cohesive communities 6. A Wales of vibrant culture and thriving Welsh language 7. A globally responsible Wales   (*See Guidance for further information*).  (Maximum of 750 words) ***Score maximum of 10 points.*** |

**Question 6 – Value for Money (*Score maximum of 15 points.)***

1. ***Minimum Volume Expectations:***

If applying through Opportunity 1, Opportunity 2 or Opportunity 3, please use the tables below to provide the minimum number of enquiries and cases[[1]](#footnote-1) by subject category and advice level that you expect to undertake across your service/s foreach year of the grant funding period.

**Minimum Volume Expectations 2025 – 2026**

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2025 to 31 March 2026.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Information & Guidance**  Number of enquiries | **Advice & Advice with Casework**  Number of enquiries | **Advice & Advice with Casework**  Number of cases | **Specialist Advice**  Number of enquiries | **Specialist Advice**  Number of cases |
| Welfare Benefits |  |  |  |  |  |
| Debt |  |  |  |  |  |
| Housing |  |  |  |  |  |
| Employment |  |  |  |  |  |
| Discrimination |  |  |  |  |  |
| Education |  |  |  |  |  |
| **Totals:** |  |  |  |  |  |

**Minimum Volume Expectations 2026 - 2027**

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2026 to 31 March 2027.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Information & Guidance**  Number of enquiries | **Advice & Advice with Casework**  Number of enquiries | **Advice & Advice with Casework**  Number of cases | **Specialist Advice**  Number of enquiries | **Specialist Advice**  Number of cases |
| Welfare Benefits |  |  |  |  |  |
| Debt |  |  |  |  |  |
| Housing |  |  |  |  |  |
| Employment |  |  |  |  |  |
| Discrimination |  |  |  |  |  |
| Education |  |  |  |  |  |
| **Totals:** |  |  |  |  |  |

**Minimum Volume Expectations 2027 - 2028**

Please indicate numbers of enquiries and cases by subject category and by advice level in the table below for the period 1 April 2027 to 31 March 2028.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Information & Guidance**  Number of enquiries | **Advice & Advice with Casework**  Number of enquiries | **Advice & Advice with Casework**  Number of cases | **Specialist Advice**  Number of enquiries | **Specialist Advice**  Number of cases |
| Welfare Benefits |  |  |  |  |  |
| Debt |  |  |  |  |  |
| Housing |  |  |  |  |  |
| Employment |  |  |  |  |  |
| Discrimination |  |  |  |  |  |
| Education |  |  |  |  |  |
| **Totals:** |  |  |  |  |  |

1. ***Proposed Grant Expenditure:***

Please see the Guidance for the maximum grant available per opportunity. Bidders are expected to put forward proposals that largely utilise the full amount of funding available for the funding opportunity that they are bidding for.

|  |
| --- |
| Please indicate below how much you are applying for over the financial years below:  2025/26 - £  2026/27 - £  2027/28 - £  3 year Total: |

Please complete the financial table below entering the expected spend profile by quarter.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **£** | **Quarter 1**  01 April 2025 – 30 June 2025 | **Quarter 2**  1 July 2025 – 30 September 2025 | **Quarter 3**  1 October 2025 – 31 December 2025 | **Quarter 4**  1 January 2026 – 31 March 2026 | **Total** |
| Expenditure Profile |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **£** | **Quarter 1**  01 April 2026 – 30 June 2026 | **Quarter 2**  1 July 2026 – 30 September 2026 | **Quarter 3**  1 October 2026 – 31 December 2026 | **Quarter 4**  1 January 2027 – 31 March 2027 | **Total** |
| Expenditure Profile |  |  |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **£** | **Quarter 1**  01 April 2027 – 30 June 2027 | **Quarter 2**  1 July 2027 – 30 September 2027 | **Quarter 3**  1 October 2027–31 December 2027 | **Quarter 4**  1 January 2028 – 31 March 2028 | **Total** |
| Expenditure Profile |  |  |  |  |  |

Please complete the financial spreadsheet at Annex B, which can be requested by emailing **AdviceNetworks@gov.wales** , entering all anticipated financial requirements for the grant period. It is important that you include as much information as possible to clearly detail how you propose to use the funding you are seeking for the provision of the information and advice service over the grant period.

Please refer to the Application Guidance regarding unit costs, co-ordination costs, Management charges/Central costs, redundancy costs and expected savings where bidders secure more than one of the available opportunities.

1. ***Outcome Expectations and Monitoring:***

If applying for Opportunity 1, Opportunity 2 or Opportunity 3 Please detail the suggested performance measures that you will use for monitoring and reporting progress in relation to the service/s to be supported by this grant.

|  |  |  |  |
| --- | --- | --- | --- |
| **Activity** | **Outputs** | **Outcomes** | **By When** |
|  |  |  |  |
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|  |  |  |  |
|  |  |  |  |
| *Add further lines as needed.* |  |  |  |

|  |
| --- |
| **a)** Please explain how the performance measures above will demonstrate to the Welsh Government that the advice services you are delivering are attaining the objectives of the grant funding? (Maximum of 750 words) |

|  |
| --- |
| **b)** Please explain how your data capture/collating processes will ensure that there is a coordinated and accurate reporting on the key performance measures on a local, regional and, if applicable, national basis?(Maximum of 750 words) |

|  |  |
| --- | --- |
| **c)** Please tick to confirm that, should you receive funding, you will work with the Welsh Government to jointly develop and agree additional performance measures, if requested?   |  | | --- | |  |   I agree |

**Section Seven - General Data Protection Regulations (GDPR)**

Please tick the personal data items that will be processed and complete the GDPR declaration at Annex A.

**Section Eight – Declaration/Certification**

1. Please confirm that your organisation has a partnership agreement with other organisations involved in this project. You may be asked to submit this if your application is successful.

**Yes/No** delete as appropriate

1. Please sign and date the application.

In a collaborative application, this must be signed by the Lead Organisation.

***Declaration/Certification***

|  |
| --- |
| Signature:  Name:  Position:  Date:  *I confirm that the information given above is accurate and if this is a collaborative bid, I am signing as the lead body on behalf of the bid partners who have delegated authority for me to do so under the partnership agreement/s for the proposed project.* |

**Notes**

Submission of the application

The deadline for submission of electronic applications is **5pm on Thursday 17 October 2024.**

The deadline for submission of any questions regarding this grant opportunity is 5pm on Thursday 22 August 2024.

* An electronic copy of the completed application form and any questions should be emailed to [AdviceNetworks@gov.wales](mailto:AdviceNetworks@gov.wales)
* Electronic applications should be presented in PDF or Microsoft WORD format. Arial and size 12 font should be used. Black print should be used.
* Your application should include:

1. Evidence to support Section Four (Quality Assurance) for each provider.
2. A signed declaration at Section Eight.
3. Completed Annex A (GDPR data fields collected and declaration).
4. Completed financial spreadsheet at Annex B
5. An organogram/structure diagram for the project, highlighting the number of dedicated Full-time Equivalent (FTE) staff supported by this grant, including their function (i.e. generalist debt advice, specialist housing adviser, manager, admin etc.)
6. Templates outlining the job descriptions and essential elements of the person specifications for any posts involved in the delivery of the funded service to include, but not limited to, (a) administrative staff (b) advice support staff (c) advisers (d) technical supervisors (e) advice managers (f) consortium co-ordinators

It is a principle of the grant that the grant funds pay for **additional activities** that would otherwise not occur if the grant were not paid. The organogram should indicate whether positions are occupied by staff who are already employed or whether they are to be recruited. If they are existing members of a provider’s staff and they are currently funded by a different funding source, this must be clearly explained, making clear which funding the staff member will be moving from, to ensure there is no duplication or double counting of funding. If a staff member is to be shared across more than one of the available funding opportunities, the organogram should make clear what proportion of the staff member is being allocated to which particular service.

Please do not send any other additional information as this will not be assessed. Please do not include personal data, such as staff names.

***Please note that applications that do not meet all of the above submission criteria will be rejected.***

**Annex A General Data Protection Regulations (GDPR)**

**Please tick the personal data items that will be processed:**

(To check boxes, right click on the box, choose Properties and mark the Default value as Checked.)

|  |  |  |
| --- | --- | --- |
| **Personal** | Name | Telephone Numbers |
|  | Home Address | Date of Birth |
|  | Business Address | Driving Licence Number |
|  | Postcode | Passport / ID Card Number |
|  | Email Addresses | Photographs / images (which could be used to identify an individual) |
|  | Unique identifying number  e.g. store loyalty card, library card etc | Other (please specify) |
| Personal  **Sensitive\*** | Racial / Ethnic Origins | Biometric data e.g. DNA, finger-prints |
|  | Political opinions | Personal financial information ( e.g. bank or credit card details) |
|  | Religious beliefs | Mother’s maiden name |
|  | Trade Union membership | NI Number (or equivalent) |
|  | Physical / mental health or condition | Tax, benefits or pensions records |
|  | Sexual life | Health or social service records e.g. Housing or Child Protection |
|  | Criminal & court records (inc. alleged offences) | Employment records (inc. self-employment and voluntary work) |
|  | Educational records | Other (please specify) |

**General Data Protection Regulations (GDPR) Cont’d.**

We, the applicant, confirm our understanding, acceptance and compliance with, the following conditions:

• All awards of grant funding must be compliant with the General Data Protection Regulations (GDPR).

• All personal information collected and held by a funded provider will need to be treated in line with the GDPR regulations.

• Carrying out the Purposes of this grant will require a funded provider to process personal data on behalf of the Welsh Government.

• The Welsh Government will be the Data Controller and the successful provider(s) will be the data processor.

• As a data processor, a provider(s) must only ask for data that is necessary and relevant to the purpose of this project, and must only collect data when there is a specific, lawful reason to do so.

***GDPR Declaration***

|  |
| --- |
| Signature:  Name:  Position:  Date:  *I confirm that the information given above is accurate and if this is a collaborative bid I am signing as the lead body on behalf of the bid partners who have delegated authority for me to do so under the partnership agreement for the proposed project.* |

1. See Guidance for the interpretation of ‘enquiries and cases’. [↑](#footnote-ref-1)