



Registration guidance

These step by step guidance notes are designed to help you complete your registration to South Gloucestershire Council's on-line grant system. If you have any questions at any stage of the process, or do not have all of the required documents, please contact the Grants Helpline on 01454 865865 or email grants@southglos.gov.uk

You should read these notes before starting the registration process to make sure you are ready with all the necessary information. Don't worry if you need to take a break when completing the online forms as you can save and return to them at any time before submitting.

You will first need to set up a [login](#) with an email address and secure password. This will create an online account for your organisation.

You only need to register your organisation once and it is your responsibility to maintain and keep records and supporting documents up to date. Don't worry if you forget your organisation's password - you can reset it and get a new one sent to your registered email address.

To help us communicate with you we ask that you **provide details of three contacts at this initial point of registration.**

When you log in you will reach the Welcome page where you will be offered two options that will take you to the Registration dashboard;

Change or submit your registration – click this button to add new registration details or to edit any records;

Or

View registration details – click this button if you only need to read your registration details and do not need to change any records.

Organisations applying for **Area Wide Grants** must complete all registration details prior to making an application and must have these approved by the Grants Team. An automated email will be issued when these have been assessed and approved.

Organisations applying for **Member Awarded Funding** do not have to complete registration before making an application to a Member but must create an online account and provide details for three contacts. If an award is made, the registration needs to be completed and approved by the Grants Team to allow payments to be processed.

Registration dashboard

Information about your organisation can be added in the following sections:

1. Organisation contact details
2. Governance and management
3. Financial management
4. Services or activities
5. Staffing and volunteers
6. Contact details. **Please provide details of three contacts at the point of registration.**
7. Supporting documentation. It is a condition of South Gloucestershire Council that all organisations must upload the following documents in order to complete the registration process.
 - Accounts for the most recent financial year.
 - Constitution or governing document
 - Safeguarding policy
 - Equality policy

Section 1: Organisation contact details

1.1 Name of organisation

Please use your official organisation name in full with no abbreviations. It must be the one that matches your governing document. If you are part of a national network but have a locally identified name then give this, e.g. Real Green South West not RGSW.

1.2 Other names by which your organisation has been known

Please list other names you have used with South Gloucestershire Council in the past. We ask this because we may already have information about your organisation under a different name.

1.3 Organisation address

If you do not have a specific office base then use the address of the lead contact responsible for the registration.

There is an automated address finder but please contact the Grants helpline for assistance if this function does not locate your address.

1.4 Organisation telephone number

This should be the telephone number at your base address. If you do not have an office telephone, please give the number of the lead contact responsible for the registration.

1.5 Organisation email address

This should be the email at your base address. If you do not have an office email, please give the email of the lead contact responsible for the registration. This is acceptable as a temporary measure but we do ask that you set up an organisation email address as soon as possible.

1.6 Organisation website

This is not essential. We recognise that not all organisations have websites so please leave blank if not applicable.

Section 2: Governance and management

2.1 Tell us what type of organisation you are:

Please state if your organisation is a community or voluntary group, social enterprise, registered charity, town or parish council, or other type of group.

- It is mandatory to select at least one option
- You do not have to be a registered charity to apply for South Gloucestershire Council funding
- You can be a social enterprise or a community group, such as a residents and tenants association, but you must have charitable and not for profit aims
- If none of the examples match your organisation then tick 'other' and give details.

Identification

If any of the following apply to your organisation then provide the appropriate registration numbers.

2.2 Registered charity number

If your organisation is registered with the Charity Commission for England and Wales then provide the appropriate charity number. If not, leave blank.

2.3 Company number

If your organisation is registered with Companies House then provide the appropriate company number. If not, leave blank.

2.4 Is your organisation registered for Value Added Tax (VAT)?

Please indicate:

- Yes
- No
- Not sure

2.5 Registered VAT number

If your charity or company is registered for VAT please provide the VAT registration number.

Governance

2.6 How long has your organisation been established?

It is mandatory to select one of the choices. This will help to identify if you are a newly formed organisation (and might be in need of additional support or guidance which we can signpost you to) or, if your organisation is established, it will help us to understand your experience and track record.

2.7 How many people are on your governing body/committee?

It is mandatory to select one of the choices. You must have a governing body or committee responsible for the organisation's management and funding. The governing body or committee is usually made up of members of the group elected once a year at the Annual General Meeting. Your constitution should detail the date of the AGM and the procedures for appointing officers/committee members. If you are members of a national body (eg The Scout Association, Girlguiding) then this question applies to your local committee only.

Section 3: Financial management

Provide your organisation's bank or building society account details. This should be the account you wish money to be paid into and cannot be a personal account.

3.1 Confirm that your organisation has a minimum of two signatories for the bank or building society account

It is mandatory to answer this question. It is essential that you have at least two authorised signatories on the bank or building society account, one of whom must be a member of your governing body. If you are requesting larger funds you might be required to submit a copy of your financial policy which confirms how your funds are managed and how payments are approved.

It is mandatory to provide the following information, (except for the building society roll number, which is optional). This information will be used to verify that you have a current bank or building society account and will enable us to make payments.

Any award we make will be paid by BACS directly into your organisation's bank or building society account. If your bank account details change for any reason you can edit these details at any time and an automated response will be sent to the three named contacts for the organisation. If a contact has any concerns having received an automated response from the system, they should immediately notify the Grants Helpline.

3.2 Name of Bank or Building Society

3.3 Account name

3.4 Account number

3.5 Sort code

3.6 Building society roll number (if applicable)

Section 4: Services or activities

4.1 What are your organisation's main areas of work or services?

Tick as many as apply. It is mandatory to select at least one option. Gathering information about your organisation will help us to build a picture of your priority service or activity areas. It will enable us to monitor the range of services delivered across South Gloucestershire so that we can make referrals and encourage organisations to network. We hope that the examples we have provided cover

your area of work but if not then tick 'other' and give a brief statement. A more detailed explanation of your work can be provided in the following question.

4.2 Provide a summary of your organisation's work or service/s

It is mandatory to provide a brief description of what you were set up to do. This is your chance to tell us about your work, the activities you undertake and services that you offer the community. You should outline your charitable purpose and describe if you work with a particular age group or deliver a specific programme of activities. Please ensure that it represents a clear and concise overview of what you do.

Section 5: Staffing and volunteers

5.1 How many paid staff does your organisation currently employ?

It is mandatory to select at least one of the options. Gathering information about your staffing and volunteer numbers will help us to build a picture of your organisation so that we can understand how you operate and what requirements you have. If you are part of a national organisation then please provide the staffing numbers for South Gloucestershire.

5.2 How many volunteers would you estimate contribute (on a part or full time basis) to your organisation over a typical year?

It is mandatory to select at least one of the options. South Gloucestershire Council wants to encourage volunteering. We are only asking for an estimated number of volunteers who are involved over a typical year. This might range from small numbers who help on a regular weekly basis to larger numbers who contribute to specific events or at different times of the year. You can also include all your voluntary management committee members. If you are part of a national organisation then please provide the volunteer numbers for South Gloucestershire.

Section 6: Contacts

On this page you should add details for three named contacts, all of which must be different with separate email addresses and phone numbers. There is an identical page for each contact.

Contact 1 (lead contact)

Please give the name, position in organisation, telephone number and email address for the person responsible for your registration. The lead contact can be a member of your governing body/committee or a staff member or lead volunteer. The email address you provide should be the best way of contacting you, now and in the future, so it could be a generic office email address, a personal office email address or a private email address.

Contact 2 (ideally Chair or Vice Chair)

Please give the name, position in organisation, telephone number and email address of a member of the organisation's governing body/committee (ideally Chair or Vice Chair).

Contact 3 (Finance/funding person for the organisation)

Please give the name, position in organisation, telephone number and email address for the person responsible for your organisation's finances and fund raising activities. They can be a member of your governing body or committee (eg Treasurer) or a staff member or lead volunteer. We need this so that we can direct specific financial enquiries to one person.

Section 7: Submission of supporting documents

Acceptable Formats

Please be aware that the maximum size of any document that you can upload is 5 megabytes. If documents are larger than this they will need to be split into smaller sections to allow you to upload them to the system. The acceptable document formats that the system can accept are:

(bmp),(BMP),(doc),(DOC),(docx),(DOCX),(gif),(GIF),(htm),(HTM),(html),(HTML),(jpeg)(JPEG),(jpg),(JPG),(msg),(MSG),(ods),(ODS),(odt),(ODT),(pdf),(PDF),(png),(PNG)(rtf),(RTF),(tif),(TIF),(tiff),(TIFF),(xls),(XLS),(xlsx),(XLSX),(zip),(ZIP).

Please contact the Grants team if you experience any problems uploading documents.

Documents and policies

Important information for



applicants

For this fund, registration can be completed at any point but must be finalised prior to payment being made to successful applicants.

Town and Parish Councils, public bodies, registered charities and South Gloucestershire Council services are deemed to be automatically APPROVED for registration purposes unless specifically identified as not meeting appropriate standards of financial stability and probity. Registration must be completed to enable payment to be made to successful applications.

If your organisation is not a Town or Parish Council, public body, registered charity or South Gloucestershire Council service, your registration will be checked for due diligence purposes; and you may be contacted if any questions arise. Once we are satisfied with your registration, APPROVAL will be issued.

Important information for



applicants

For this grant, all organisations must be registered to the Grants on-line system with approval received prior to application.

It is a condition of South Gloucestershire Council that all organisations submit copies of their:

- most recent accounts.

- constitution or governing document
- safeguarding policy
- equality and diversity policy

For a very new or small organisation, the required documents can be basic as long as they represent your organisation and its work. If your organisation doesn't currently have policies on safeguarding or equality and diversity then we can provide model policy templates for you to amend and adapt to suit your organisation's objectives. These are available on request from the Grants team. Additionally, [CVS South Gloucestershire](#) can offer advice and training to voluntary groups that require support to develop governance and policies.

Accounts

All organisations must submit accounts that represent their financial position over the most recent financial year. The supporting document can be:

- full, audited accounts
- independently examined accounts
- profit and loss and balance sheet statements
- income and expenditure statement, or
- copies of recent bank statements (for new organisations, active less than six months).

Annual income less than £5,000?

If your organisation's annual income is less than £5,000, you can upload a statement of account. Your written statement should show the period that the accounts cover (usually one year); your full income for the period; your expenses; and your closing bank balance (less any bills remaining to be paid).

Is your organisation under six months old?

If you are a new organisation (under six months), you can supply copies of recent bank statements. You must submit at least one bank statement. If you have any concerns then please contact the Grants Helpline.

Governing document

All organisations must submit a governing document that sets out your organisational 'rules'; for example, a Constitution or Memorandum and Articles of Association.

Constitutions usually cover the following areas.

- Name of organisation
- Aims
- Members
- Committee and officers
- AGM and other meetings
- Rules of procedure
- Finances
- Changes to the constitution
- Dissolution

If you do not have a governing document or would like to develop your existing one then please contact [CVS South Gloucestershire](#) for advice and training in governance.

Safeguarding policy

All organisations must submit a safeguarding policy, regardless of whether they work with children and/or vulnerable adults. You can, at this stage, contact [CVS South Gloucestershire](#) who will help you to develop this policy. You can also use a safeguarding template that we can issue to you which you must amend and personalise to your organisation.

Equality and diversity policy

All organisations must submit an equality and diversity policy. You can, at this stage, contact [CVS South Gloucestershire](#) who will help you to develop this policy. You also have the option to use the equality and diversity template that we can issue to you which you must amend and personalise to your organisation.

Declaration – terms and conditions agreement, checks and submission

Please read the terms and conditions carefully before you submit your registration in agreement of the terms.

To finalise your registration you must tick the authorisation box which confirms that you understand the terms and conditions attached to any offer of an award.

You can now review your registration to check that you are happy with all details and **press the Submit button**.

As always we would welcome any feedback on how we can improve the process and will continually revise guidance in light of any comments received.

This information can be made available in other formats. Please phone 01454 868009 if you need help to access Council services.

The [South Gloucestershire Compact](#) is an agreement to support partnership working between the public sector and voluntary, community and social enterprise organisations. You can download a copy of the South Gloucestershire Compact 2014 from our [web page](#).