BBC Radio 4 and BBC One Lifeline Appeal

STEP TWO: Thinking about completing an application form?
Read this to help you.

Please read this guidance before you complete the application form. Please answer all questions with clear and concise responses with examples, if relevant. If questions are left blank the form will be incomplete and your application will not be processed for assessment. If a question is not relevant please explain why.

1. OBJECTIVES OF THE CHARITY
1.1 Please only select one main category which best describes the majority of your work from the list provided. If your work does not fit under any of these headings please select ‘other causes’ and briefly explain your main activities.

Please note that an appeal cannot support:
- animal welfare;
- restoration or repair of buildings, new building or extension work;
- religious organisations that are seeking to proselytise or whose beneficiaries are of a particular faith;
- funds or charities which exist to maintain or establish physical memorials;
- benefits provided by trade or professional organisations benevolent fund;
- activities where donations would replace funding or services normally provided by central government and local authorities;
- local charities that operate within limited geographical areas;
- charities that are members of the Disasters Emergency Committee

The BBC has requirements for impartiality in relation to what it broadcasts and it cannot broadcast an appeal connected to political activities. If you are involved in campaigning work on an issue of current public or political controversy, the BBC and the Appeals Advisory Committee will need to be satisfied that this does not give rise to concerns. They will need to be sure that an appeal can be framed within the BBC’s requirements for due impartiality in its output. This applies particularly where the charity has a high media profile in relation to a current debate. Further information is available at:

http://www.bbc.co.uk/editorialguidelines/guidelines/conflicts-of-interest/external-activities#heading-charities-and-campaign-work
and
http://www.bbc.co.uk/editorialguidelines/page/guidelines-impartiality-introduction

For religious organisations, activities must be for the relief of suffering or the promotion of physical or mental well-being. The benefits from an appeal must be available to people from all faiths and to those of no faith.

If you are unclear if your organisation and/or activities are eligible for an appeal, please contact the Charity Appeals Assistant on 0208 752 7044 before submitting an application.

1.2 Please outline the current aims of your work and how you achieve them.
You need to demonstrate that your organisation has clearly defined charitable aims and objectives that responds to a clear need. Your response should be a maximum of 1200 characters including spaces.

1.2.1 If you have an agreed longer term strategy in place, please outline any differences from your current aims and how they will be achieved. This could be a published strategy or an internal document agreed by trustees that covers a three or five year period.

1.3 Please explain how your organisation assesses and communicates the impact of your activities. This section is expected to address the issue of how you measure and demonstrate the impact of your activities.

1.4 Please state the number of trustees based on the current financial year.

1.5 Please state the number of employed full time equivalent staff based on the current financial year.

1.6 Please state the number of volunteers / interns based on the current financial year.

2. BENEFICIARIES
2.1 What age group does your charity help across all of its main activities? Please tick the one option that best matches the main beneficiaries that your charity supports across all of its activities.

2.2 Do beneficiaries pay for services offered by the charity? Please answer yes or no. There is space to add comments and explain if some services may be free and others chargeable.

2.3 Describe the ways in which beneficiaries are involved in the planning and organisation of your charity. Please explain, with examples, how members / service users / public can participate in events and activities and make a contribution to the development of the charity.

3. SCOPE & SIGNIFICANCE
3.1 Where does your work mainly take place? Tick all areas that are applicable. You need to demonstrate that your work has significance beyond one local project. In the following questions, please explain the breadth and reach of what you do.

3.2 Please explain where your beneficiaries are located in the UK. Please give a brief description of the geographical areas of the UK that you currently operate in with the approximate number of beneficiaries in England, Wales, Scotland and/or Northern Ireland. Please describe the impact or influence of your work across England, Wales, Scotland and/or Northern Ireland with examples. If you are a local charity that operates within a limited geographical area in a town or county you will not be considered eligible for an appeal. Priority will be given to organisations that demonstrate that they deliver activities for beneficiaries located in one or more of the nations of the UK.

3.3 For international charities, please detail all of the countries or the regions within one country in which you work. Please give a brief description of the geographical areas of the country or regions within a country that you currently operate in and approximate numbers of beneficiaries in each area. Please describe the impact or influence of your work across the country with examples. Priority will be
given to organisations that deliver activities for beneficiaries located across several regions within a country of across countries.

3.4 Please detail the ways in which your work has national (for UK charities) and/or international significance (for charities working overseas) and provide examples.
Your charity may operate a model or approach which has influence or engagement in the wider sector beyond your own direct geographical reach. Perhaps you can demonstrate uptake of your approach into national or sector policy or practice, or that it has concretely contributed to substantial debate and advancement of knowledge in your professional discipline.

3.5 For international charities only, please state the percentage of your annual expenditure for the current financial year spent in each country / region.

4. AIMS OF THE APPEAL
You will be considered for a Radio 4 Appeal or a BBC One Lifeline Appeal. If successful the BBC Appeals Advisory Committee will determine whether your appeal is for broadcast on Radio 4 or BBC One.

4.1 Have you had an appeal broadcast in the last three years on any TV or radio channel in the UK?
Please answer yes or no and provide dates and details of any appeal that has been broadcast in the UK on television or radio such as the Community Channel or a local radio station.

4.2 Would you like your appeal for a specific time period? Please state the date or month if known or no preference.
For example, do you have a national /international campaign that is being launched in eight to 12 months time? Do you have a significant anniversary coming up? Please explain the significance of the proposed date.
A charity can only have an appeal on the BBC once every three years. If you have had an appeal before, you must check the transmission date of the application round to which you are applying i.e. when will your appeal be broadcast, is it three years since the last appeal? Charities which are unsuccessful in an application round must wait two years before resubmitting a new application.

4.3 Please state the core message of your intended appeal summarised in one sentence.
This is an important question that will help us to identify the charities that can communicate well about the work they do and who are more likely to engage the interest and support of radio / tv audiences.

4.4 How much money do you expect to raise from an appeal?
Please state a realistic figure that you would like to raise from an appeal. The amount of public donations received varies significantly and is difficult to predict. On average charities raise between £5,000 and £20,000. On occasion charities manage to raise £50,000 or attract attention from a major donor / funder but this is generally the result of the extra efforts exerted by the charity rather than a direct result of the broadcast appeal itself. Equally, some charities may raise less than £5,000.

4.5 What will the money raised from your appeal be used for? Explain who will benefit and where they are located.
It is up to you to decide whether you want to raise funds to contribute to your overall charitable activities, or for a specific project or development. In either case, you need to provide a persuasive statement about the purpose of your appeal and to be clear how you will use the money, including explaining who will benefit and where they are located. In an appeal, you can give examples of
activities that money raised will support. But if you appeal for a specific project, you will must treat any money you raise as restricted for that project.

4.6 With the money raised from your appeal how will you deliver the main objectives of your appeal? Will you be working in partnership with other organisations, if so please state the names of any partners and their roles.
If you will deliver activities supported by funds raised from an appeal in partnership with other agencies (public, private or third sector) in the UK or overseas please describe who they are, where they are located and what they will do. It is important that you are satisfied that all partners are financially stable and have appropriate policies and procedures in place.

4.7 What impact do you expect the appeal will have on your charity and how will this be measured?
Describe the specific changes that funds raised from an appeal will have on your charity. This could be enabling capacity building, raising the profile of your services, recruiting more members or donors. Explain how you will monitor the impact of and evaluate any lessons learned from the appeal.

4.8 What impact do you expect the money raised will have in terms of making a positive difference on the communities / lives of individuals and how will this be measured?
Describe the impact that funds raised will have on your beneficiaries. This could be about expanding an existing activity, delivering a new services or reaching more service users. Explain how you will monitor the impact and evaluate any lessons learned.

4.9 Describe the skills and capacity that you have to support an appeal within your existing staff, trustees and volunteers.
It is important that you consider if your organisation can allocate sufficient time and resources to a BBC appeal before you apply. Charities should have the staff / volunteer time and resources available to support a broadcast. Radio 4 appeals are 2 minutes 50 seconds or approximately 420 words long. For a radio appeal you will need to work with us to find a presenter and write a script. The presenter could be a celebrity or someone with a high public profile that is an existing patron or supporter or it could be someone that you have not worked with before. The Radio 4 Appeal Producer will provide help and guidance regarding the script and the presenter.

TV appeals are 9 minutes long. Charities will be required to dedicate more time and resources to a Lifeline TV appeal where you will need to allocate time to source contributors who will talk about the charity on screen, assist with setting up filming at your charity if required and possibly attend parts of the four day shoot. The Lifeline Director will write the television script and you will be able to check it for factual accuracy prior to filming. Once filming and editing starts, the production team takes full responsibility for the film. The BBC has final editorial responsibility for all appeals.

You should also consider that you have sufficient time and staff resources to complete the feedback form as part of post appeal monitoring.

4.9.1 Briefly describe the type of case studies that could be used and any issues of suitability, access or consent.
Case studies are important to a Radio 4 appeal and at the heart of a TV appeal. Your organisation must be prepared to contact a range of individuals to assess their suitability and willingness to take part. This area can present real challenges and requires careful consideration of issues such as consent, suitability and access.

4.10 How do you currently use social media? Please explain how online, digital, social media, general publicity and your supporter base will be used to maximise the impact of the appeal.
Please explain how you will make the most of your BBC Appeal including how you will promote the appeal across your networks of members, supporters or donors in order to make sure you reach the most people possible. The evidence of past appeals suggests that the more capacity, proactive effort and creative initiative that a charity is able to invest both before and after the appeal the greater the ‘multiplier’ effect on the fundraising outcome. This may include alerting regular supporters to the appeal, passing the word on social media, asking the applicant to use their own social media to promote the appeal and thinking about how to follow-up the appeal.

5. GRANTS

5.1 Please list all grants received from any of the following: BBC Children in Need, Comic Relief or other BBC Broadcast Appeals, including local radio, within the last three financial years. Add in extra lines as necessary.

5.2 Please list all BBC grants already approved or expected for the next two financial years. Add in extra lines as necessary. Please tick the box to confirm that you have not received any grants other than the ones listed. Receipt of other grants will not prevent you from receiving an appeal, but it is helpful for us to know about them.

6. FINANCIAL INFORMATION

You are asked to provide detailed financial information on current, previous and future financial years in order for the Appeals Advisory Committee to assess your financial sustainability. The BBC will not broadcast an appeal for a charity which is considered to have insufficient resources such that it may threaten the operational viability of the charity. For example, if your financial year runs from April to March and you are applying to the BBC in January 2015 the information required in 6.1 is for the period 2013/14, information required in 6.2 will be for 2014/15 and information required in 6.3 is for 2015/16 and beyond.

Please state the month and year of your accounting period.

6.1 Last Financial Year

6.1.1 Please state the start and end date of your last financial year as dd/mm/yyyy.
6.1.2 Please choose one option from the menu on your total income in the last financial year.
6.1.3 Please list the amount of income received in the last financial year against the income sources and the percentage of each of your total income for that period. Please describe any other sources not listed.
6.1.4 Please provide financial information for the last financial year for income, expenditure and assets. Please make sure that you fill out all of the boxes, where a value is not relevant just add zero. If you are providing annual accounts for this period, please make sure that the figures that you provide in the application form match those in the accounts.
6.1.5 If you had an operating deficit in the last financial year, please explain why this occurred, if it was planned and how it was managed. Please explain if this was a one off or cumulative effect from previous financial years and the reasons why.

6.2 Current Financial Year

6.2.1 Please state the start and end date of your current financial year as dd/mm/yyyy.
6.2.2 Please state your expected income for your current financial year.
6.2.3 Please give details of any single grants and donations that represent more than 20% of your total projected income for the current financial year. Please state funder, amount, start and end date and if secured or expected. Add in extra lines if necessary.
6.2.4 If your levels of expenditure for the current financial year will vary significantly from those of your previous financial year please explain why. This could be due to restructuring of a team or a grant funded project ending part way through the financial year. A significant variation is anything over 10%.

6.2.5 Please state your expected surplus/deficit for the current financial year. If you expect a deficit, please explain the reasons and how this will be managed over the next 12 months.

6.2.6 Please give details of your reserves policy and the free reserves (including any designated funds) that you currently hold which can be drawn on. If any reserves are designated for a specific purpose, please state how much and what the intended purpose is.

6.3 Future financial years
This section should not include information for the current financial year given in 8.2 above.

6.3.1 Please provide details of any single significant grants of more than 10% of your total annual income for the next financial year. Please state funder, amount, start and end date, if confirmed or applied for. Add in extra lines as necessary.

6.3.2 If you are expecting a deficit and/or have significant grants or donations that will end within the next 18 months, please provide details about how the financial sustainability of your organisation will be managed. Please describe your fundraising strategy to cover any known loss of income. Please describe the impact that these financial losses will have, any expected changes such as service cutbacks, staff structure, redundancies, merger and how these will be managed.

7. DECLARATION
Organisational policies
7.1 Please provide information about your organisation’s policies on diversity, data protection and child protection and/or vulnerable adult policy, if relevant. Please complete the table with the date that the policy was first adopted, the date it was last reviewed and the frequency of review.

If you will deliver activities supported by funds raised from an appeal in partnership with other agencies it is important that you are satisfied that all partners have appropriate policies and procedures in place. Please only submit your organisation’s policies and not those of the organisations that you are working with.

7.1.1 – 7.1.3 Please describe how you implement your policies in practice across your organisation. If you do not have a specific policy in place, please detail what steps you are taking to develop one.

7.2 Programme and Organisational Effectiveness
Please list any external bodies to which you belong which help you to maintain programme and organisational effectiveness and standards. For example this may include People in Aid, Association of Medical Research Charities, Funding Standards Board, Investors in People, Charity Finance Group, Institute of Fundraising, Information Commissioner’s Office or others.

Code of Practice
Please ensure that you read the Code of Practice in the application form.

Confirmation
Pleases complete the confirmation section of the application form.
8. SUPPORTING DOCUMENTS
You must submit the following documents together with the completed application form:

- A copy of your most recent published Annual Report.
- A signed copy of your most recent published audited or independently examined accounts and balance sheet.
- A completed 18 month cash flow (template available here)
- Management accounts to cover the period from the last published accounts to within a three month period of the date of this application. This information should detail income, expenditure and any significant change in assets or reserves balance sheet and should also be signed by the Chair of Trustees or CEO.
- If you are a new charity, please provide audited accounts filed and accepted by the Charity Commission for two consecutive financial years.
- Evidence of charitable status: A copy of Certificate of Registration with the Charity Commission or print-out from the Charity Commission’s website.
- A copy of your diversity statement.
- A copy of your data protection policy.
- A copy of your child protection policy, if relevant.
- A copy of your vulnerable adult policy, if relevant.

If questions are left blank the form will be incomplete and your application will not be processed for assessment. If a question is not relevant please explain why.