



Photo: Nigel Pacey, Biggar RFC



## Club Sustainability Fund Revenue Fund – Season 2016/17

Guidance Notes and Application Form

## Introduction

The Revenue strand of the Club Sustainability Fund (CSF) provides funding for club sustainability projects. If an application is successful, projects will receive funding for 1 year, or for 2 years in the case of exceptional projects only.

Where Scottish Rugby considers that a club has a successful track record of developing rugby in their local community, that club may apply for funding to support specific new projects designed to increase club revenue by:

- increasing playing and non-playing membership;
- increasing efficiency, sponsorship, business partnerships and the involvement of local businesses in the club; or
- extending community usage of club facilities.

## Guidelines

### What kind of project is eligible to apply for funding?

The following examples illustrate the types of projects which are eligible for funding, however this is not an exhaustive list. Clubs must discuss their application with their Club Services Manager in order to ensure their project fits with the CSF's aims and eligibility criteria.

### Category 1

Projects/Posts to improve and increase club membership.

Examples could include projects/posts with the followings aims or effects:

- To develop regular communication systems for engaging with club members that better involve them in club activities and understand club matters;
- To manage, monitor and maximise membership subscription payments;
- To attract new members, retain current members and re-engage lapsed members;
- To increase family involvement and resultant spend at the club;
- To develop playing and non-playing membership; or
- To increase female involvement throughout the club.

### Category 2

Projects/Posts to improve and increase local business involvement at the club.

Examples could include projects/posts which:

- Attract and retain sponsorship through better business engagement, sponsor packages, and sponsor communications/management; or
- Ensure sponsorships/partnerships with business have tangible benefits to the club, and ensure that sponsor benefits are delivered to improve sponsor satisfaction/retention.

### Category 3

Projects or posts that increase member and wider community involvement with the club.

Examples could include projects/posts which:

- Increase usage of club facilities by community groups and businesses with resultant increased club revenue; or
- Run events and community activities which increase awareness, sponsorship, users and spend in the club.

All applications will be considered on merit but priority will be given to those that deliver the greatest impact against the aims and objectives set out in this document. Priority will be given to clubs out with the BT Premiership.

### **Ineligible Projects**

The following types of projects are ineligible for CSF Revenue strand funding:

- Capital projects for facilities improvements (clubs should apply for such funding through the CSF Capital strand)
- Projects/posts that are already underway
- Projects/posts which have already received or will receive funding through a different strand of Scottish Rugby's funding e.g. Schools of Rugby, Club Development Officers.
- Applications submitted by non-member or non-associate member clubs of Scottish Rugby.

### **What requirements will my application have to meet?**

Clubs must demonstrate all of the following in an application:

- A clear need and demand for what is proposed.
- A track record of rugby development e.g. increasing or sustaining participation at adult and youth levels, close links with local schools and a commitment to developing/ supporting coaches and volunteers.
- That the project/post is relevant to the club's current playing size, facility provision and priorities.
- That there is a potential membership and local business market to be explored/ utilised through the project/post.
- How the project/post will be managed or employed.
- How the project/post will increase club revenue.
- How the club plans to make the project/post financially sustainable after the end of Scottish rugby funding.
- How the project/post promotes equality and social inclusion in sport.

### **How much funding can I apply for?**

Up to 50% of the total project/post cost, to a maximum of £10,000 per annum for one year, or 2 years for exceptional projects only.

### **When is the submission deadline?**

7 November 2016

## Assessment process

Applications must be received by 7 November 2016.

The application process will normally take just over two months to the end of January 2017.

Scottish Rugby aims to turn around decisions on applications within the time scales noted above, however this is entirely dependent on applicants providing the information needed to fully consider the application. On occasions further investigation may be required which will require more time.

## What are the potential outcomes for my application:

- Approve an award, either in full, part or conditionally
- Defer taking a decision until further information is provided by the applicant
- Make no award

All applications will be objectively assessed and ranked by Scottish Rugby against the following three categories:

- Rugby Development – existing and proposed number of members, playing and non-playing
- Project Sustainability – demand and positive impact of project, potential membership and business markets, income generation and plans to sustain post after CSF support
- Project Viability - financial and operational management employment arrangements (if relevant)

If there is a high volume of applications only those applications ranked highest priority will receive an award.

All awards may be subject to additional terms and conditions imposed at the discretion of Scottish Rugby. The final amount of any award is at the discretion of Scottish Rugby and may be less than the amount requested.

## Payment of Awards

Payment of successful awards will be made in two installments, initially on the evidence of the project having started, first month's expenditure or salary costs and after six month's if the agreed outcomes have been met.

## Application Form

Scottish Rugby welcome applications to the Revenue strand of the CSF. Before completing this application please read the Application Form from start to finish, paying particular attention to the advice notes provided in the margin of each page. It is essential that applicants also read the guidelines at the start of this document.

### Contents

Section 1	Applicant details
Section 2	Project details & impact
Section 3	Financial Details
Section 4	Operational details
Section 5	Documentation
Section 6	Certification

## Completing the application form

This form has been created as a fillable PDF form. In order to complete this document electronically you will need Adobe Reader (version 8.1) or newer. This file must be downloaded and saved before being completed.

If you are not using the Adobe Reader, either on a Mac or a PC, please do so. The latest version can be downloaded from <http://get.adobe.com/uk/reader/>.

Mac users – please note: If you are using a Mac to complete the form, please ensure that you have opened the document in Adobe Reader (version 8.1) or newer and not the Mac default 'Preview' application.

If you have any problems with the form request a hard copy from Scottish Rugby. Please submit your application via email by saving it and sending it to [csf@sru.org.uk](mailto:csf@sru.org.uk) including scanned copies of your supporting documents. You may alternatively post the full application to the address noted below.

*Please note that if you print the application form, the hidden areas in the scrollable text boxes will not print out. Please print out the text separately and attached with the form.*

Domestic Rugby Support

BT Murrayfield

Edinburgh, EH12 5PJ

Tel: 0131 346 5000 | Fax: 0131 346 5001 | Email: [csf@sru.org.uk](mailto:csf@sru.org.uk)

### Data Protection

Scottish Rugby will use and process the information provided as part of this application in accordance with the requirements of the Data Protection Act 1998. The information you provide us with may be held on file, both paper and electronic. We will use this information to process applications and grants, to prepare statistics and to monitor and evaluate the effectiveness of investments. Please note that by signing the application form you are giving explicit consent for the data collected about you and/or your organisation to be recorded, processed and used for the purposes outlined above or for any other legitimate reason.

## 1. Applicant Details

### 1.1 The Club / Applicant

Name of Rugby Club

Number of years organisation  
been in existence

Contact Name

Position within Organisation

Address for correspondence

Postcode

Tel Number (Work)

Tel Number (Mobile)

Tel Number (Home)

Email address

Web Address

## 1.2 Advice Notes

Please attach a copy of your governing documents / constitution.

### 1.2 What is the status of your organisation?

Local voluntary or community sports club

Company limited by guarantee

Company limited by shares

Community Amateur Sports Club

Charity (Please provide Scottish Charity Number:)

Other (Please specify:)

## 1.3 Advice Notes

Player numbers should be consistent with the data on Scottish Rugby player registration system

### 1.3 Current & Proposed membership numbers

	Male	Female	Total
Playing members under 18			
Playing members over 18			
Non-playing members			
Total			

#### Year 1 Proposed

	Male	Female	Total
Playing members under 18			
Playing members over 18			
Non-playing members			
Total			

#### Year 2 Proposed

	Male	Female	Total
Playing members under 18			
Playing members over 18			
Non-playing members			
Total			

## 2. Project Details & Impact

### 2.1 Please provide a description of the project.

#### 2.1 Advice Notes

*Please provide a description of the project including title; what the project aims to achieve; how this will be achieved and annual targets for increased sponsorship / membership resulting in increased revenue.*

### 2.2 How will the project be financially sustainable once Scottish Rugby funding has ended?

#### 2.2 Advice Notes

*Please outline how the project will be funded once the Scottish Rugby funding has ended, giving details of any confirmed contributors and increased revenues upon which it will depend. Please include your plan outlining how these forecast revenues will be generated.*

### 2.3 Please detail your current commitments to developing rugby in your local community?

### 3.1 Advice Notes

Before applying we strongly recommend that you seek the advice of HMRC to determine the extent (if any) of VAT recovery.

### 3.2 Advice Notes

Remember to include VAT charges if you cannot recover or avoid them. Please also attach a full breakdown of the project costs.

## 3. Finance

### 3.1 Is your organisation registered for VAT?

Yes

No

If yes, please provide your VAT registration number

### 3.2 Cost Breakdown

Please summarise the annual costs below in as much detail as you consider appropriate.

Category	Cost (£)	% of total cost
Staff		
Equipment		
Consumables e.g. stationery		
Other project elements		
<b>Total project cost</b>		
Professional fees and expenses		
Contingency		
VAT		
<b>Total project cost</b>		

### 3.3 How much funding (£) are you applying for from the Club Sustainability Fund – Revenue strand?



### 3.6 Advice Notes

Please provide figures relating to your organisation's financial position as shown in its most recent balance sheet.

Please provide a copy of your latest and previous two years Annual Accounts and a copy of a current bank statement(s).

### 3.7 Advice Notes

Please indicate the last two years and current income and expenditure position (where appropriate) as shown in your annual accounts, and summarise your forecasts for the first three years following implementation of this project. Please include loan repayments and interest but exclude all capital costs and funding.

### 3.6 Financial Position

- (a) Fixed Assets (£)
- (b) Current Assets (£)
- (c) Current Liabilities (£)
- (d) Net current assets / (liabilities) (b-c) (£)
- (e) Long term liabilities (£)
- (f) Net assets (a+d-e) total (£)

### 3.7 Operating income & expenditure

	Income(£)	Expenditure(£)	Net(£)
2 years ago			
Last year			
Current Position			
Year 1			
Year 2			
Year 3			

### 3.8 What assumptions have been made in preparing your forecast?

#### 4. Advice Notes

*Please include details of where this project/post will sit in your clubs organisational and governance structures.*

#### 4. Club Management & Staffing Structure

Please provide details of who will be accountable for this project/post including any management responsibility?

#### 5. Documentation

Please confirm that you are enclosing the following documents, where relevant, in support of this application.

Governing Documents

List of names & full contact details of office bearers

Latest and previous two years' annual accounts

Current bank statement(s)

Child protection policy

## 6. Advice Notes

*Please ensure that you have fully consulted your Club Services Manager before submitting your application.*

## 6. Certification

Your application must be endorsed and countersigned by an authorised representative of your organisation (e.g. President, Treasurer, Secretary) other than the main contact person referred to in Section 1.1, page 1, or the signatory to the applicant's statement on this page.

### 6.1 Endorsement

I endorse this application, confirm that it has been authorised by the organisation, and certify that to the best of my knowledge, the information provided is truthful and accurate.

Signature

Date

Name

Position

Tel Number

Email

### 6.2 Applicant's Statement

Please read and sign this statement. This is a legally binding declaration.

I confirm and certify on behalf of this applicant that:

I am completing this application on behalf of the organisation named in question 1.1 and have read the Guidelines, and have formally authorised this application to Scottish Rugby.

The project which is the subject of this application has not been commenced.

On completion of the project no-one will be denied the right to equal access to our facilities on the grounds of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation, political or other opinion. To the best of my knowledge all information provided in this application and its supporting documentation is truthful and accurate. I understand that any misleading statements given at any time will render this application invalid. I undertake to inform Scottish Rugby fully and immediately if any changes in circumstances require us to amend the application or the supporting material.

I certify that I have made full and complete disclosure of all relevant facts relating to the application, or its subject matter, whether supportive of the application or otherwise.

Signature

Date

Name

Position

Tel Number

Email