

Guidance for completing the general application form

Introduction

Thank you for considering submitting an application to NHS Lothian Charity. Our hope is to make the application process as simple and successful as possible. This guide sets out the information we hope to see in response to the questions in the application form. Please read this fully before making a start on your application as this will maximise your likelihood of success.

However, remember this is not a test, if at any point you have questions or would like to ask for advice, please do so by emailing loth.charity@nhs.scot. We are here to help.

General notes

- You **cannot save the form** as you go so you may wish to prepare your responses to the questions in a word document and cut and paste them into the form. All of the questions are listed in this document to help you plan your responses.
- The Charity is unable to support the running costs of projects that have begun/are ongoing.
- In this document you will see certain questions have an asterisk (*) by them. These questions are mandatory, and you will not be able to progress or successfully submit your form until these are completed
- The Charity is unable to provide financial support to any core activity or item. Grants can only be awarded for enhancing activity, spaces, services or experience.
- Retrospective requests are not accepted so **please ensure you gain prior approval before making purchases**. Any spend without approval is done at your own risk.
- Accurate costs are required for the application so **please ensure you have obtained quotes** (please note that any purchases made using an NHS

Lothian Charity grant must comply with NHS Lothian's standard financial instructions and be purchased through the standard procurement routes)

- for electrical items people get a quote from estates via a minor works form
- for building works people get a quote from estates via a minor works form
- for IT equipment get a quote from e-Health by raising a helpdesk ticket
- for specialist equipment, e.g. scanner they get a quote from the supplier
- for services e.g. builders, trainers, etc have a discussion with procurement about known suppliers or the supplier you wish to use via a helpdesk ticket.

Form Details

Section 2: About you

In this section of the form, we ask you information about yourself. We need the information in this section to ensure we can contact you about the application and any subsequent grant.

2.1 Applicant's Name*

2.2 Applicant's Job Title*

2.3 Applicant's Department*

2.4 Applicant's Directorate*

The information about directorate helps us to match your application with possible funding sources. By 'directorate', we mean the functional division of NHS Lothian with in which your work is based, e.g. Women's & Children's Services, Edinburgh Cancer Centre,

2.5 Applicant's Site*

The information about site helps us to match your application to possible funding. If your project will support multiple sites, please provide the one you are based at but give details about the other sites supported later on in the form.

2.6 Applicant's Site Address

Please ensure that Street Address, City, Local Authority/County, Postcode and Country are completed or else the form will throw back an error when you try to progress.

2.7 Applicant's Work Email Address*

This is the route you will most commonly be contacted by

2.8 Applicant's Work Phone Number

2.9 Line Manager's Name*

2.10 Line Manager's Job Title

2.11 Confirmation of Line Manager's support

Please upload confirmation that your line manager is aware of and supportive of your application – Max. file size: 2 MB.

A brief email is sufficient, a formal letter is not required.

Please note only standard file types can be uploaded through the form. **.txt files are not supported**, so please ensure your documents are saved in an accepted format such as .doc, .docx, .pdf, or .xls before uploading.

Section 3: Project basics

In this section we will ask you to explain what the grant will be used for and how you need this is needed.

3.1 Project Name

Please provide a title for your project

3.2 What is your project?

Please outline your project in 250 words or less. Tell us who the project will support, what activities will take place, where activities will take place, how the grant will support this.

3.3 What need is your project addressing?

Please tell us about the issues or gaps your project will address and how you know they exist. E.g. what observations have you made, what feedback do you have, etc.

3.4 How do you know that this project is an impactful way of addressing this need?

Please tell us why you believe that the project will be successful in meeting the needs you have identified. Include any examples, research or any other evidence you are aware of.

Section 4: What difference your project will make

In this section we will ask you about the difference your project will make and to whom.

NHS Lothian Charity's mission is to have a positive impact on health in the Lothians. We do this through our priority objectives (listed below).

- Enhanced patient and carer experience
- Improved clinical outcomes for patients
- Reduced health inequality
- Improved community health
- Improved staff wellbeing and professional development.

An application does not need to address all of the priority objectives to be successful. However, as there is often an interconnection between these objectives, we ask that you consider how your project will impact on all of them when completing this question.

4.2 Please tell us which priority objective your project will impact on:*

Please tick all that apply

- Enhanced patient and carer experience
- Improved clinical outcomes for patients
- Reduced health inequality
- Improved community health
- Improved staff wellbeing and professional development

An application does not need to address all of the priority objectives to be successful. But please do consider the broader benefits your project may offer across all the objectives and select all that apply. We are interested in differences made in all areas even if it just a small one.

4.3 Please explain how your project will enhance patient and/or carer experience

You will only be prompted to answer this question if you indicated in Q4.1 that the project will make a difference to the related priority objective.

4.4 Please explain how your project will improve clinical outcomes for patients

You will only be prompted to answer this question if you indicated in Q4.1 that the project will make a difference to the related priority objective.

4.5 Please explain how your project will reduce health inequalities

You will only be prompted to answer this question if you indicated in Q4.1 that the project will make a difference to the related priority objective.

4.6 Please explain how your project will improve community health

You will only be prompted to answer this question if you indicated in Q4.1 that the project will make a difference to the related priority objective.

4.7 How many patients will benefit from your project?

Please provide your best estimate if you do not know exact numbers. Please note that the Charity recognises the importance of supporting all groups of patients, and that sometimes intensive work with a smaller group is required so a large number is not necessarily required for a grant to be awarded.

4.8 Please provide an explanation of the number provided

Please tell us how you arrived at the number of patients benefiting e.g. there will be 25 staff using the staff room, 12 patients will attend the support group, 150 people using the waiting room a week.

4.9 Do any of those patients experience health inequalities

WHO defines health inequality as systematic differences in health status of different population groups. Health inequality affects people from disadvantaged or historically oppressed groups most severely.

- Yes
- No

4.10 How many patients experience health inequalities?

You will only be prompted to answer this question if you indicated in Q4.9 that the project will support patients experiencing health inequalities.

Please provide your best estimate if you do not know exact numbers.

4.11 Please explain how your project will improve staff wellbeing and/or professional development

You will only be prompted to answer this question and questions 4.15 – 4.20 if you indicated in Q4.1 that the project will make a difference to the related priority objective.

4.12 Is the project:

- An external education event e.g. a conference or course?
Please wait for confirmation that funding has been approved to attend the course or conference before making any arrangements to book travel or accommodation.
- An internal educational event?
- A wellbeing activity?
- A wellbeing enhancement e.g. staff room improvements?
- Other?

4.13 Are you applying for support with travel and accommodation costs to be booked through NHS Lothian's Travel Team?

NHS Lothian Charity follows NHS Lothian's standing financial instructions relating to the booking of travel. Booking via the Travel Team is highly recommended.

If your application is successful, we'll then send you a link to provide all the details about your travel and accommodation needs to be booked through NHS Lothian's Travel Team e.g. travel times, accommodation preference, passport numbers, etc.

- Yes
- No

4.15 How many staff will benefit?

We recognise that there may be a knock on/cascaded benefit to other staff, and we will ask you about this later on. In this question, please provide the number of individuals who will directly benefit from the project. Please provide your best estimate if you do not know exact numbers.

4.17 Tell us a little about those staff e.g. roles, bands, etc.

It is helpful for the Charity to understand which staff are being supported to try and facilitate equity. Please tell us about the job family and grades of the staff involved, it is also useful for us to understand the locations the staff work at, especially if they are not all at the same place.

4.18 How were those staff selected for the opportunity?

The Charity is keen to ensure that benefit is equally distributed and that there is equity in access. Please explain how the staff benefiting were selected. For example, will the whole team benefit, did the beneficiary(s) come up with the idea themselves, will the opportunity be advertised to everyone and then there is a selection process, if so what is the selection process, is it only relevant for some staff, etc.

4.19 How will learning be monitored/shared/cascaded?

You will only be asked this question if you selected external education event, internal educational event, in Q4.12. The Charity is keen to understand how those participating will share the learning facilitated by the Charity's grant so that there is maximum benefit to the team and greatest impact for patients e.g. will they

present at a team meeting, prepare slides to circulate via email, prepare a paper or poster, etc.

4.20 What impact will this have on the delivery of the service you provide?

The Charity is keen to support staff learning so that they feel valued and feel fulfilled in their work but ultimately it is hoped that any support for individual or groups of NHS Lothian staff will have an impact on the service. This could be improved staff retention or sickness absence or morale – in which case tell us about the current situation and what you hope it will be improved to. It could be that that new patient pathways could be offered, or improved experience for patients, if so please tell us about those. It could be that the service is recognised as an exemplar of excellence, etc.

4.21 Are there any other benefits/impacts/outcomes that you would anticipate from the project?

Alongside the planned impacts for patients, staff, or community health, many projects also have other impacts. For example, a staff garden to improve wellbeing may also improve biodiversity, a new piece of equipment may need less single use consumables reducing waste, dance sessions for patients might reduce medication prescribed saving NHS Lothian money. Please tell us about any other benefits you anticipate in your project, e.g. cost savings, service efficiencies, reduced waste, increased biodiversity, reduced emissions, etc.

4.22 How long after the project do you expect the project outcomes/benefits to last?

This question helps the Charity understand the sustainability of the impact facilitated by the grant. In response to the question, please provide a timeframe e.g. 10 years, six months, for example if a piece of equipment is purchased when will it need to be replaced? If the activity is provided for patients that supports rehabilitation how long will the benefit last a lifetime?

4.23 Are there any other indirect beneficiaries?

Indirect beneficiaries are those groups who will benefit as a secondary result of the project. Not all projects will have indirect beneficiaries, but many do so please consider all of the people impacted by the project. For example if a patient activity is provided for some of the patients on a ward will those not involved benefit from

a quieter ward, if three staff go on a course will the remaining staff benefit from their learning via a team meeting, is there less pressure on ED colleagues as the patient's health condition is now better managed, are family members less stressed as they understand the patient's condition better.

- Yes
- No

4.24 Please tell us about any indirect beneficiaries

Please provide information about any groups who will indirectly benefit from the grant e.g. other departments, non-participating patients, non-participating staff, family, friends, the general public, and give an estimation of how many. For example, the wider team of a further 6 staff will benefit from shared learning, on average 12 visitors a week will benefit from the quiet space

Section 5: Financial information

We require this information to match the application with a possible funding stream, as part of the assessment process and to enable efficient payment/purchases if the grant is successful.

Please also note that NHS Lothian Charity observes NHS Lothian's Standing Financial Instructions and procurement procedures.

5.1 How much money are you seeking from NHS Lothian Charity?

Please provide the total amount required including VAT. Please note that grants will not be increased without reassessment and that under the grant terms and conditions any unspent monies must be returned to the Charity.

5.2 Please explain how you reached this figure

Please tell us about any quotes gained or calculations carried out to achieve this figure.

5.3 Please provide a breakdown about how the money will be spent.

Provide a detailed breakdown of how the total will be spent e.g. £1,000 on room hire, £20,000 on staff salaries for a fixed term band 5 post, £500 on catering, £3,000 on the purchase of a vein finder.

5.4 If you will be purchasing anything for the project, please provide the email address of the person who will be placing orders.

Please note that there may already be someone in the department who is responsible for or has experience using PECOS.

5.5 In most cases, purchases will need to be made through PECOS. Does the person identified above have a Charity PECOS log in

If the person you have identified as placing orders does not have a Charity PECOS login, we will create one and may be in touch separately regarding this.

- Yes
- No

5.6 For some purchases or payments that are not possible through PECOS, we will transfer the money to your cost centre. Please provide the cost centre below:

If you are unsure of the cost centre speak to your budget holder or Management Accountant

5.7 If you have a quote or an image that you would like to include, please upload this below. (Max. file size is 2 MB.)

As noted previously, it is highly recommended that quotes are secured prior to the submission of the grant. If you have these please attach them. You may also wish to attach a photograph of a space you wish to refurbish, etc.

Section 6: Practicalities

In this section we will ask you about how you will move things forward if your application is successful. The information in this section helps the assessment panel understand that you have thought through the ideas fully, spoken to the relevant people to ensure that things move forward successfully and in a timely manner.

The amount of detail you provide in this section will depend on the nature and complexity of your project.

6.1 Please tell us how you will implement your project?

Please tell us what you are going to do to achieve the outcomes you have outlined earlier in the application form. Please provide details about key milestones, timelines, who will be involved to deliver the project, etc.

For example, when would you hope to begin recruiting patients to the activity, who is going to liaise with IT or estates, will there be a working group, when will the project be completed, etc.

6.3 What is the plan for when the money from this application has been fully spent?

Please tick all that apply

- Items will still be in use
- The project will be complete
- The project activities will be embedded in regular practice
- We will be seeking continuation funding from NHS Lothian
- We will be seeking continuation funding from NHS Lothian Charity
- We will be seeking continuation funding from another source
- Please provide more information on the answer given above

Section 7: How did you hear about us

Please tell us how you found out about the opportunity to access funding from NHS Lothian Charity. This helps us understand which communication channels are most effective, so we can improve how we share future funding opportunities and ensure they reach the right people.

Section 8: Terms and Conditions

By submitting the application you are agreeing to the grant terms and conditions if you are successful so before submitting your funding application, please read our [Terms and Conditions for Charitable Funding](#).