

# Application Guidance Notes

The Scottish Mountaineering Trust (SMT) is a charity which provides funds to projects and organisations that promote recreation for the public, knowledge and safe enjoyment in the mountains of Scotland or elsewhere. These notes are designed to help applicants by explaining the criteria that Trustees of the SMT use in the evaluation of requests for funds.

Trustees need to know:

- About the organisation and people applying for the funding.
- Does the project have a charitable aim supported by the SMT?
- Will the project be successful?
- How much money is required from the SMT?

## The Organisation and Applicant

The Trust will consider applications from charities, other voluntary bodies, commercial organisations, public bodies and private individuals.

The type of organisation is less critical to the Trust than the nature of the project for which the funds are required.

## Is the project's charitable aim supported by the SMT?

The Trust will consider projects which meet at least one of the seven charitable categories defined by OSCR (the Scottish Charity Regulator) which are in line with the SMT's own objectives. The seven categories are:

- The provision of recreational facilities, or the organisation of recreational activities, (again the emphasis is on helping a wide range of people make constructive and life-enhancing use of their leisure time)
- The advancement of public participation in sport (the key element is to enhance the range of participants in activities involving physical skill and exertion).
- The advancement of education (for example skills training or broader education or research).
- The saving of lives (both saving those in danger and safety of participants).
- The advancement of arts, heritage, culture or science (including history, traditions, academic disciplines, **exploration** and experimentation)
- The advancement of health (both physical and mental health)
- Any other purpose that may reasonably be regarded as analogous to any of the preceding purposes.

The applicant should also consider:-

- A key part of the concept of being charitable is that it is of public benefit, and so the benefits of the project must be available to a part or large part of the public.

- The SMT actively promotes initiatives which promote recreation and enjoyment of the mountains in an environmentally friendly way.
- While projects outwith Scotland are eligible, the SMT will normally expect a clear and relevant connection to Scotland.
- Applications for expedition funding need to show that they are exploratory, scientific or of public benefit in other ways (along with a commitment to publish its activities and findings).
- Mountain walking and climbing, or travelling to mountains, are not in themselves charitable activities. It is the act of promoting the activity with the public that is charitable.
- Private clubs can apply, but it must be clear that their projects will benefit the general public. For example, a club hut should be available to the general mountaineering public, or club activities should be available to non-members.

## Will it be successful?

It is important that the applicant demonstrates to the SMT that their project will be successful.

The SMT will look for:-

- Clear objectives and a credible plan that sets out what is going to happen.
- Clear and strong management.
- The applicants have access to the necessary funding, skills, experience and other resources to complete the project successfully.
- Realistic assessment of the risks.

The applicant should also note:-

- It is helpful for the SMT to see supporting documentation such as designs, or quotations from subcontractors who will be working on the project. Appendix 1 lists the information required for Building / Capital projects.
- For Expeditions the SMT expects to see information about the members of the expedition which will demonstrate that they have the skills and experience that match the scale of the objectives.
- Usually the SMT will look for a significant part of the funding to be provided by the Applicant, as a sign of commitment and engagement in the project.
- If the applicant does not have the all the funding in place the SMT may advance a small amount of money to fund the initiation phase. The need for this should be made clear in the application.

## How much money is required from the SMT?

The SMT need to know the full cost of your project, how much money you require from the SMT, when it is required, and how you plan to generate other money required.

The SMT can provide money as a grant, a loan or as a combination of both. Loans are often available for the purchase/renovation of huts.

Funds are not provided unduly in advance.

All grants will lapse if not taken up within a period of two years of the SMT Meeting awarding the grant.

Where a project is cancelled any monies advanced by the SMT must be refunded without undue delay.

## General points

The project must not vary from its outline in the application.

The SMT's data protection policy which governs when and why the SMT collects personal information, how it is kept secure, and how it is used, can be found in the SMT Privacy Notice (<https://thesmt.org.uk/smt-privacy-notice>).

Where a grant is made, the SMT requests acknowledgement of its support in any published material. The SMT reserves the right to attach such conditions to any grant as may be deemed appropriate.

All information provided to the SMT must be true and honest.

All decisions made by the SMT are final and not subject to appeal.

## Appendix 1 – Documents required for Building/ Civil Engineering Projects

1. Building and works plans/blueprints
2. Copy of the timeline and delivery plan with milestones and activities.
3. Cost estimates
4. The contractors names and quotations/contracts
5. Planning permission certificates ( if granted)
6. Building warrant (if granted)
7. Copy of deeds/security on the building ( i.e. is the building owned or long lease),
8. Copy of the organisation's constitution
9. Copies of the last three years accounts for the organisation.