



# Guidance notes

To help you to apply and then work on behalf of the Permaculture Association and use its charitable status.

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## Why use the Permaculture Association's charitable status?

If your project has looked at applying for public and private funding to get it going or to develop a new activity, you will have found that some funders will only provide financial assistance to UK registered charities.

To help our members in this respect, the Permaculture Association has been running this scheme since 1992 to support groups and projects to find the funding they need, so they can set up local projects, provide education or conduct research.

The process is intended to:

- provide small and new groups with support in the early stages, when registering as a

charity is not really an option;

- help you get started, try out new ideas, and build up your activities to the point where you have your own legal status, or have reached the end of the project;
- or, in the case where you are already constituted as a cooperative or have other forms of non-charitable legal status, to gain support from a funder that would otherwise not be able to support you.

There is a clear process to go through to gain approval that has been designed to comply with our legal duties as a charity. By using our charitable status, you will be working as a part of the Permaculture Association for the 'approved' project. We can't give our charitable status to others, but you can work as part of the Association to deliver the work.

Read these Guidance Notes, and check the Terms and Conditions, to help you decide if this is right for your project. We highly recommend that you get in touch to discuss it before making an application.

Some of the projects we have supported have been 'one-off' and are no longer in existence. Some have now become charities in their own right. Often projects have found that working on behalf of the Permaculture Association has benefits of adding credibility to their work, and has helped them to be taken seriously by other organisations. Some have found that appearing to be a branch of a national organisation has been a drawback, so you need to be sensitive to this and use the process sensitively.

Many funders will often provide money to groups that are not registered charities, and in that case, you do not need to use the Association's charity status in the funding bid. You may just need to set up as a simple [unincorporated group](#). The charity status should only be used when applying to funders that require it.

Any funds you receive by being an Approved Member Project will be processed through the Permaculture Association's bank account. However, your primary contract remains with the funder, and you need to be able to fully satisfy their demands for evaluation, reports, monitoring, and end of year accounts.

The Board of Trustees are responsible to the Charity Commissioners for all projects using charitable status. It is therefore important that you read these guidance notes carefully, so that you understand what is required to make the relationship between your project and the Permaculture Association work smoothly. Please make sure that everyone involved in the running and planning of your project has read them through too, so that you all have a shared understanding of what is required. Contact the office if there is anything that is not clear to you, or that you feel needs more clarification.

We have put these guidance notes together after negotiations some years ago with the Charity Commission. We have tried to keep paperwork to a minimum, and ensure that the relationship between your project and the Association is as beneficial as possible.

## **Requirements and eligibility**

- You need to be a group member of the Association. In some cases we can agree to take the membership fee from your first successful grant application.
- You should be, or have the involvement of, a graduate of the Permaculture Design Course.
- Your project must have the endorsement of two members of the Association that are either graduates of a Permaculture Design Course or holders of the Permaculture

Diploma (or working towards it).

- You must be willing to be visited or contacted by Trustees or their representatives.
- If you raise funds using the Charitable Status, you must provide end of year accounts, for inclusion with the main Association accounts and our annual submission to the Charities Commission.
- You must be willing to provide a project report each year that the project lasts.
- Your bank account must have two signatories. In some cases we may be able to process payments for you if you do not have a bank account.
- You need to complete the application form, sign the declaration and agree to the Terms and Conditions.
- You must be willing to accept an administration fee on any monies raised.
- The project must be within the remit of the Permaculture Association, and be consistent with our charitable objects (as set out in the Memorandum and Articles of Association 2006), which are:

**3** The Charity's objects (the Objects) are:

**3(1)**

**(a)** to advance the education of the public in the theory and practice of permaculture, the conservation of the environment, and related subjects.

**(b)** to carry out research into permaculture and related subjects and to publish and disseminate the results of such research with or without charge.

**3(2)** In the furtherance of these objects :

**(a)** to research and to collect, coordinate and disseminate information about permaculture;

**(b)** to produce, publish and develop, or cause to be produced, published and developed, information on permaculture, whether in printed, electronic, or other forms such as films and broadcasts, and whether gratuitous or for sale.

**(c)** to promote, manage or arrange courses, hands-on training, lectures, seminars, conferences, demonstrations, exhibitions, and other means and resources so as to provide and facilitate the education of the public in the theory and practice of permaculture;

## **Abbreviations used**

AMPS – Approved Member Project Status

AMPPS – Approval of Member Project & Proposals Subcommittee (a subcommittee of the Board of Trustees)

## **How to apply**

- Review these Guidance Notes, look at the Application Form and Terms and Conditions and discuss it with your group.
- We recommend that you contact us to discuss your application before filling in the form.
- Once you have decided to go ahead with the application, send it to us by email, and the AMPPS committee will make a decision, usually within 2-3 weeks.

## If you are successful

- You will be sent a letter confirming that you are authorised by us to use the Association's charitable status when making applications for funds.
- Once you have identified a funder, get in touch and we will confirm whether we are already in receipt of funds from them, or if an application is pending, if not, go ahead, if we are already working with them we will ask if they are willing to receive another application.
- Please remember that each application needs to be approved by the Association before you send it to your prospective funders.
- When you raise funds, you need to send us a copy of the grant letter from the funder.
- Once your project is up and running, we will supply you with a copy of our logo to use. Your project is working as part of a registered charity, and this must be made clear. On documentation, please use wording along the lines of:

<**NAME OF PROJECT**> is working in partnership with the Permaculture Association, Charity 1116699, Company 05908919

As well as our logo, if you can, please add the website too [www.permaculture.org.uk](http://www.permaculture.org.uk)

## Its urgent! What do I do?

Your application for charitable status needs to be approved by the Permaculture Association before you send any application for funding to your prospective funders. If you have an urgent or time limited need, for example local authority funding that is only available for short-term use, ring the office and speak with the Chief Executive, who will advise you further. We can't make any promises!

## How your application is processed

When we receive your application we:

1. Check that it has been fully completed. If it hasn't we will contact you and request further information or send the form back for completion.
2. Completed forms are sent to three of the Trustees that sit on the AMPPS Committee for consideration. In some situations, AMPPS may feel that the decision needs consideration by the whole Board, in which case the application will be taken to the next full quarterly meeting.
3. Within a week of the decision being made, we will let you know. If your application is successful, you will have approved Permaculture Association Member Project status (MPS) and you'll receive:
  - An acceptance letter from the Trustees.
  - A letter of endorsement to send to potential funding bodies.
  - An electronic copy of the Association's logo, to use in your communications.

Unsuccessful applications will receive a letter explaining why the project was rejected, and what needs to be done in order to re-apply. If we will not accept a further application we will tell you.

## The administration fee

The funds that you receive through being an Approved Member Project will be processed through the Permaculture Association's bank account. An administration fee is levied on all monies raised using this process. A fee of 5% is made on monies raised up to £10,000, and

1% thereafter. It applies to all projects, whether its a Nepali permaculture project, or a small group in the UK - everyone contributes equally - without exception.

For example, if you raise £40,000

5% of £10,000	= £500
1% of the remaining £30,000	= £300
<u>Total fee</u>	<u>= £800</u>

Please arrange for cheques to be made payable to the 'Permaculture Association (Britain)'. If funders wish to make a direct transfer to our account, please contact [finance@permaculture.org.uk](mailto:finance@permaculture.org.uk) for our account details.

We have made these fee arrangements after a great deal of consideration, and as far as we know, they are the lowest rates any charity charges. (Other charities that extend this arrangement to projects charge between 15-35%!) We use the money to cover the administration of this process and any surplus is set aside to support the Permaculture Association's work. The Trustees reserve the right to review the fees levied for this service. If this is done, all projects will be informed.

So that your project does not find itself short of money because of this fee, it is important that you include it in your budget. This can be done by either adding it as a direct heading, eg, 'Permaculture Association administration and management fee', or by just adding the fee to your overall management budget.

Remember that only money raised using charitable status needs to come through our account. It is always worth checking with the funder or supporter whether they need you to be a charity to agree funding. If they don't then you don't need to send applications forms for approval by AMPPS, or put the money through our account.

## **Gift Aid**

As a Permaculture Association Member Project, if a friend or donor wishes to make a donation to your work, and they are a UK taxpayer, it may be worth asking them to make this donation through the Permaculture Association. As a charity we can claim an additional 25% from the Government. We can provide a Gift Aid Form (available at the bottom of [this page](#)) for them to fill in. They need to make it clear that the donation is for your project. The same fees apply.

For example, a friend gives you a £1000 donation, via a Gift Aid donation to the Permaculture Association.

£1000 x 25% = £1250  
£1250 x 5% = £ 62.5 administration fee  
You receive = £1187.50 i.e. an additional £187.50

Please note that Gift Aid claims are made quarterly, and you would not receive the extra income until we have received a payment from Inland Revenue. Donations need to be over £100 to be worth processing, unless you are able to send 'batches' of smaller donations.

## **Notes to help you fill in the form**

The questions we ask on the form have been designed to give us the information we need so that Trustees can make good decisions - they have been written after consultation with, and advice from, the Charity Commission.

Please fill in the form electronically and email it to us. Electronic signatures are acceptable in law, so there is no need to send any physical paperwork. If you want to send any supplementary information, please also send this electronically to minimise costs and make it easy for us to send it to Trustees. Please keep additional material to a minimum.

#### Part 1: Organisation/group name and contact information

**Please** use the **overall name of your organisation or group wanting to use the Association's charitable status**, rather than the name of the particular project, programme or activity you are seeking funding for. The specific project details are required in Part 4, below.

**Main contact person:** the person responsible for liaising with the Association for this application.

#### Part 2: Promoting your work and the Data Protection Act

**Data Protection Act:** We need your permission to store your information. You must tick the first box, otherwise we cannot process your application.

#### Part 3: General information about your organisation

This section is asking you about your overall organisation, not just a specific project you may be seeking funding for. We need all of this information for charity purposes.

#### Part 4: A description of the project for which you are seeking funding.

The specific project details for which you propose to seek funding are required here. Give its title, the contact name and details and then an outline of the project. If there is more than one, complete this part of the form for each. In the future, you might only need to complete this part for Member Project status to be extended, provided everything within it is acceptable, your reports have been satisfactory, and there have been no significant changes to your organisation (subject to confirmation by AMPPS).

#### Parts 4.2 and 4.3 - Meeting the criteria of Education and Research

Fill in either **part 4.2** or **part 4.3**, although you can fill in both parts if relevant

To work on behalf of the Association, it is necessary that your project has either an educational or a research benefit associated with permaculture. Education includes training, action learning - learning through doing (such as if people involved in the project are trained whilst working on your project then it may qualify) - and producing educational materials such as books, posters, and exhibitions. Demonstration projects designed to advance public education through visits and on-site activities would also qualify.

Research projects need to have clear aims and a suitable methodology. What are you trying to find out, and how will you do this? Thought needs to be given as to how research will be made available to the wider permaculture network and beyond.

We have received guidance from the Charity Commission as to what research would qualify as charitable (and therefore fundable by us):

- Research has to be carried out with the aim of having a public benefit.
- It should be well managed and cost effective.
- It must be of a good quality.
- Because we are an educational charity, research must be disseminated.
- It must fall within the scope of activity the Permaculture Association can undertake.

Please describe the particular project that you will be applying for funds for. In this section, we want to know as much as possible about the particular project for which you want to use charitable status.

#### Part 5: Skills, management, funding, benefits, planning

**Skills and qualifications:** we need to be sure that the project will be of a good quality. It is not important that everyone has a degree or lots of letters behind their name. But it is important that you have the necessary skills and experience. If you will be going on training courses as part of the project, please tell us about them.

**Managing the project:** what structures do you have in place to ensure that the project will be well coordinated, run to schedule, and that any difficulties are picked up and dealt with? Who is responsible for budgets and ensuring health and safety measures are in place? You may be a small project with an informal structure, or you may be a voluntary organisation with a coordinator and set management structure. The size or complexity of the structure isn't important, but it must be sufficient to manage the project.

**Funding the project:** for a project to be successful, it is important that the proposed budget is appropriate to what you are trying to achieve. Ideally we would like to see the budget you have created. If this has not yet been done, then an indication of the total should be included.

**The permaculture connection:** how does your project relate to permaculture? It is important that there is a connection otherwise the project will be outside the permitted activities of the Association.

**Public benefit:** again, there has to be one to qualify for support from the Association. This is because our objects state that our work will *advance public education*. Research projects must also have a public benefit and be disseminated so as to advance public education.

**Association benefit:** all activities carried out by the Association must benefit the Association in some way, and help to deliver the charitable objects. Since the project will effectively be working as part of the Association, it must also help to deliver some clear benefit for the Association. In most instances, the answers will essentially be the same as those given under 'public benefit'. For example a training project may have public benefit of delivering sustainable design courses for socially excluded people. The Association benefits by being able to deliver more training, raising its public profile, and improving the way it delivers its charitable objects

#### Part 6: Demonstrating member support for your project

- Because the trustees cannot visit every project that applies to use charitable status, we ask that you find two 'supporters' that have taken the full Permaculture Design course - and preferably have the Permaculture Diploma or be working towards it - to support your application.
- They should be current members of the Association, but should not be involved in your project.
- They need to read and sign the form themselves. They need to have visited the project, so

- that you can explain to them what you are trying to achieve, and how you will achieve it.
- Gaining the endorsement of two supporters is an opportunity to build support for your project, get new input, design guidance and extend your network of project allies.
  - If you find it difficult to locate members in your area, contact the office for lists of local members.
  - We may be able to visit, or ask a Trustee to make a trip out to see you, if you cannot find people locally.

#### Part 7: Project declaration - to be signed by project leaders

- This must be signed by the main contact person.
- You must have read the terms and conditions before signing this section.

#### How we can help

- We can provide standard text about the Permaculture Association and any specific details about us that you need from us to fill in funding applications.
- We can help promote your work through our regular communications channels - website, newsletter, e-bulletins and social media. The emphasis is on you to provide the content, and then we can share it. Contact <Communicate@permaculture.org.uk> with your news and updates.
- We may also be able to suggest a funder or funders, and in some cases enable you to use our funding subscription service (Funding Central - free to use if you have an income of less than £100,000).
- We can give modest advice about your project.
- But we can't do the applications for you. You need to be able to design and run your own project and do the application writing.

#### **Any questions?**

If you are unsure about filling in the form, or whether your project would qualify, or any other matter, contact the Association's office. We encourage you to contact us before starting this process. Usually you will need to speak to the Chief Executive, who has responsibility for this area of work. If there are particular questions we don't know the answers to, or are unsure about, then we can contact the Charity Commission or others for advice.

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