



Unity Impact Grant Application Guidance



Contents

Introduction	3
1. Grants available	3
2. Eligibility criteria	3
3. What the grant can be used for	4
Project funding / direct funding	4
Restricted operational and overheads / indirect funding	4
Restricted capital expenditure / capital funding	4
4. Impact criteria and assessment	5
Clear definition of beneficiary group / customers:	5
Evidence of need:	5
Evidence of impact:	5
Sustainable practices:	5
5. How to access the grant application form	6
6. Application form guidance	8

Introduction

The Unity Impact Grants programme launches in September 2024 as part of our pledge to provide £40,000 of donations and grants to celebrate Unity's 40th anniversary. Three grants of £5,000 each (a total of £15,000) will be awarded to exceptional customers to enable them to maximise the impact they create in their local communities.

The programme is open to customers of Unity Trust Bank who have banked with us for at least one year. The grants can be used for projects, operational or capital spend. The grant must be used to enable the awardee to continue delivering positive social, environment or economic impact in their local communities.

You can access the Unity Impact Grant application form from 2nd September 2024, either via your Online Banking account or by [clicking here](#). Applications will close at midnight on Monday 30th September. This guide provides details of:

1. Grants available
2. Eligibility criteria
3. What the grant can be used for
4. Impact criteria and assessment
5. Accessing the application form
6. Application form guidance

Thank you for your interest in the Unity Impact Grants programme, please continue with this guidance to understand if you are eligible.

1. Grants available

In 2024, Unity established a total funding pot of £15,000 for our Unity Impact Grants (UIG). There are **3 grants of £5,000 each** which can be used for projects, operational or capital spend but not unrestricted funding. The grant must be used to enable the awardee to maximise the impact they are creating in their local communities.

2. Eligibility criteria

- You must have been a Unity customer for at least **one year prior to 1st September 2024**.
- You can be a lending customer, banking customer or deposits customer but you must have an **'active'** account with Unity.
- Your organisational incorporation should be within the recognised VCSE (Volunteer, Community, Social Enterprise) sector and should be **one of the following**:
 - **A Charity incorporated with the Charity Commission** or nationally relevant equivalent
 - **A Community Interest Company (CIC)** incorporation can be by shares or guarantee if

Access the **Unity Impact Grant application form** in your Online Banking account or click [here](#)

the organisation is on the CIC register

- **Registered with the FCA Mutuels list as a co-operative or mutual** with clear social, environmental or community purpose.
- **Part of a registered Trade Union**
- The £5,000 grant must be no more than 30% of your organisation's previous year's income.
- The organisation must be based in the UK and must deliver impact in the UK. For clarity, the organisation must be **registered and operating** in England, Northern Ireland, Scotland or Wales.
- Unity will not fund **pre-dated matched funding requirements**.
- Your organisation should be the direct delivery agent of the social, economic, environmental, or community good that the application is for. The Unity Impact Grant will fund (for example but not limited to):
 - A charity responsible for the maintenance and / or providing access to green spaces to protect biodiversity and promote wellbeing.
 - A CIC specialising in mental health support services directly to young people.
 - A housing association delivering employment and therapeutic services to vulnerable tenants.
- The Unity Impact Grants programme will not fund (for example, but not limited to):
 - Charities providing grants to other organisations delivering services.
 - A CIC which subcontracts its service provision to a third party to deliver services to vulnerable groups.

3. What the grant can be used for

Unity aims for our grants to be as flexible as possible and that the money will provide the greatest possible benefit to the successful applicants and their communities... Unity will fund spend in the following categories:

- **Project funding / direct funding:** UIG funding can contribute to delivery costs of projects, services or products delivered by the organisation.
- **Restricted operational and overheads / indirect funding:** UIG funding can contribute to indirect / operational costs associated with but not directly contributing to services. This could include (but is not limited to) back-office functions, communications, business development, office costs and refurbishments. The use of funds must be specifically defined.
- **Restricted capital expenditure / capital funding:** UIG funding can be used to contribute towards the cost of purchasing, maintaining or improving capital assets. The fund usage must be specifically defined with clear justification for how the capital expenditure supports the impact delivered by the organisation.

Please note, Unity will not fund **pre-dated matched funding requirements** and applications will be limited to **one per organisation**.

For any questions about the Unity Impact Grant or the application process, please email us@unity.co.uk with 'Unity Impact Grant' as the subject.



4. Impact criteria and assessment

Unity is a 'double bottom line' bank. This means that we aim to support organisations delivering a benefit to society as well as achieving commercial success.

The UIG is 'outcome area agnostic'; therefore, Unity is open to all outcomes that contribute to the UN Sustainable Development Goals. The following criteria will be applied as a key factor of the successful grant recipient:

- **Clear definition of beneficiary group / customers:** The successful applicant will have a clearly defined beneficiary group with a clear articulation of the disadvantage, vulnerability or exclusion faced and how their organisation supports this group.
- **Evidence of impact need:** Whether it is nature restoration in environmentally depleted areas, specialist care services to a particular user group, affordable housing or education for marginalised young people, the successful organisation will have a clear articulation of the environmental, economic or societal need for their organisation. This must align with one of the 17 the UN Sustainable Development Goals (SDGs).
- **Impact evidence:** Demonstration of quality monitoring & evaluation (M&E), impact management or customer quality assurance to ensure the work the organisation delivers contributes to meaningful and sustained change.
- **Sustainable practices:** Organisations that demonstrate sustainable practices, a commitment to reducing their environmental and carbon footprint and can evidence responsible environmental and employment practices will receive additional scoring.

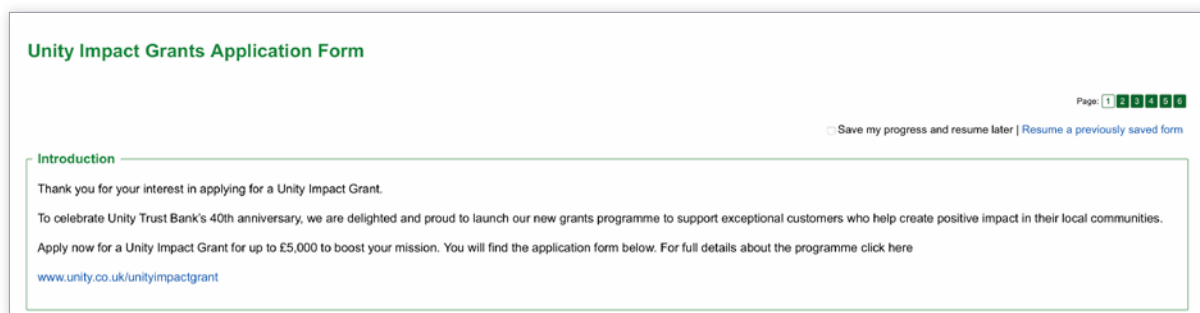
Unity expects this to be a highly subscribed programme, therefore we cannot provide feedback to all candidates. All applicants will be informed whether they have been successful or not by 29th November 2024.

Access the **Unity Impact Grant application form** in your Online Banking account or click [here](#)

5. How to access the grant application form

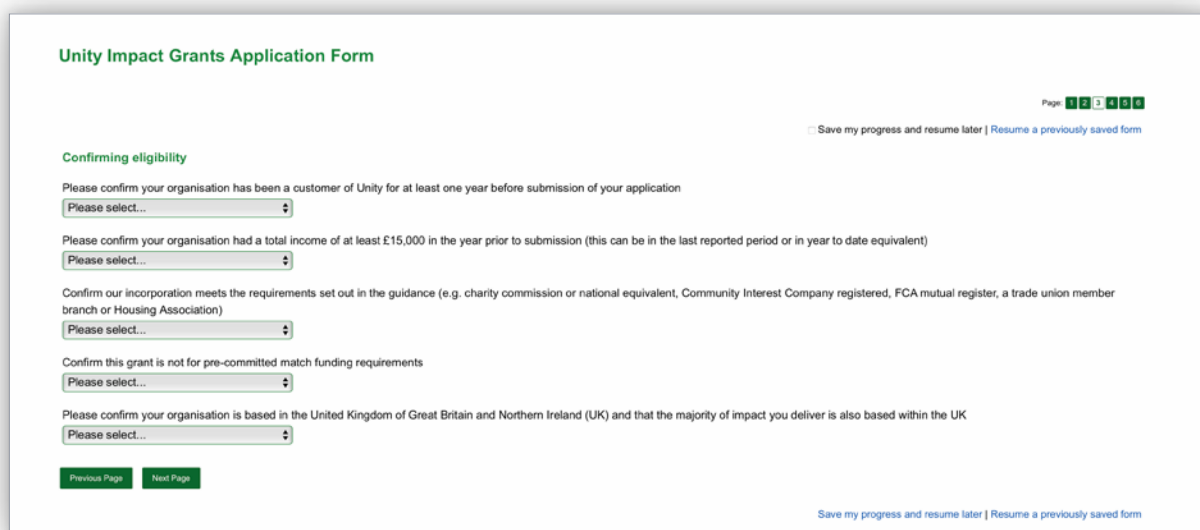
You can access the Impact Grant application form from 2nd September 2024, either via your Online Banking account or by [clicking here](#).

The application form will take you through a series of questions confirming your eligibility, the use of funds and proposed impact.



The screenshot shows the landing page of the 'Unity Impact Grants Application Form'. The title is 'Unity Impact Grants Application Form' in green. In the top right corner, it says 'Page 1' followed by five small squares, the first of which is green. Below this, there are two links: 'Save my progress and resume later' and 'Resume a previously saved form'. The main content area is titled 'Introduction' and contains the following text: 'Thank you for your interest in applying for a Unity Impact Grant. To celebrate Unity Trust Bank's 40th anniversary, we are delighted and proud to launch our new grants programme to support exceptional customers who help create positive impact in their local communities. Apply now for a Unity Impact Grant for up to £5,000 to boost your mission. You will find the application form below. For full details about the programme click here www.unity.co.uk/unityimpactgrant'.

Figure 1: Screenshot of landing page for Unity Impact Grant application



The screenshot shows the 'Confirming eligibility' section of the application form. The title is 'Unity Impact Grants Application Form' in green. In the top right corner, it says 'Page 2' followed by five small squares, the second of which is green. Below this, there are two links: 'Save my progress and resume later' and 'Resume a previously saved form'. The main content area is titled 'Confirming eligibility' and contains the following text and form elements: 'Please confirm your organisation has been a customer of Unity for at least one year before submission of your application' followed by a dropdown menu labeled 'Please select...'; 'Please confirm your organisation had a total income of at least £15,000 in the year prior to submission (this can be in the last reported period or in year to date equivalent)' followed by a dropdown menu labeled 'Please select...'; 'Confirm our incorporation meets the requirements set out in the guidance (e.g. charity commission or national equivalent, Community Interest Company registered, FCA mutual register, a trade union member branch or Housing Association)' followed by a dropdown menu labeled 'Please select...'; 'Confirm this grant is not for pre-committed match funding requirements' followed by a dropdown menu labeled 'Please select...'; and 'Please confirm your organisation is based in the United Kingdom of Great Britain and Northern Ireland (UK) and that the majority of impact you deliver is also based within the UK' followed by a dropdown menu labeled 'Please select...'. At the bottom left, there are two buttons: 'Previous Page' and 'Next Page'. At the bottom right, there are two links: 'Save my progress and resume later' and 'Resume a previously saved form'.

Figure 2: Confirming eligibility for the Unity Impact Grant

For any questions about the Unity Impact Grant or the application process, please email us@unity.co.uk with 'Unity Impact Grant' as the subject.

Following your confirmation of eligibility, you will proceed to your application for Unity to assess your suitability for a Unity Impact Grant. There is an opportunity to upload supporting materials for your application. Please note, clarity of grant budgeting and evidence of impact will be taken into consideration.

At any point during your application, you can save and resume later by clicking 'save my progress and resume later'. Set your own password and email address to use this function:

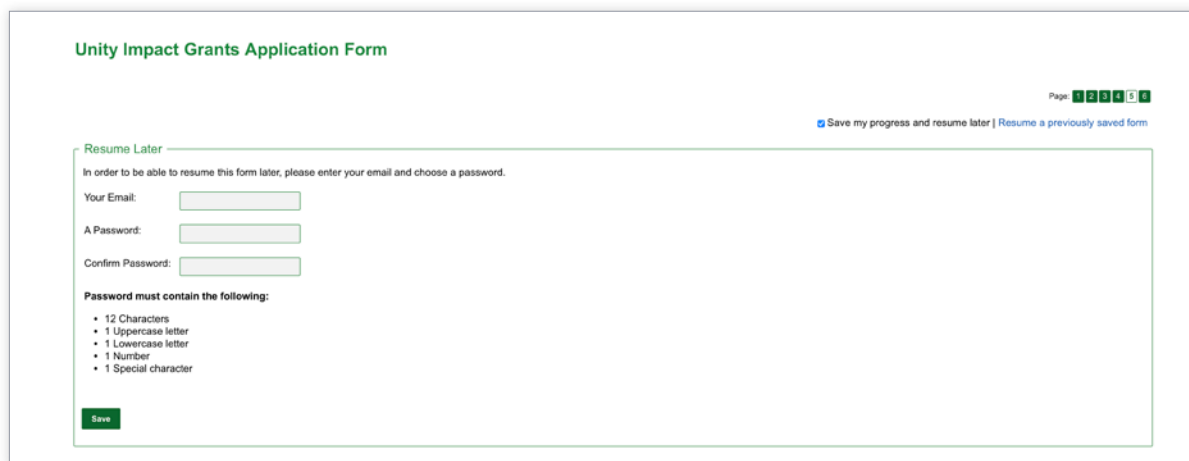
The screenshot shows the 'Resume Later' section of the 'Unity Impact Grants Application Form'. At the top right, it says 'Page: 1 2 3 4 5 6' with the first four pages highlighted in green. Below this are two links: 'Save my progress and resume later' (with a blue icon) and 'Resume a previously saved form'. The 'Resume Later' section is enclosed in a green border and contains the text: 'In order to be able to resume this form later, please enter your email and choose a password.' It has three input fields: 'Your Email:', 'A Password:', and 'Confirm Password:'. Below these fields, it states 'Password must contain the following:' followed by a bulleted list: '12 Characters', '1 Uppercase letter', '1 Lowercase letter', '1 Number', and '1 Special character'. At the bottom left of the section is a green 'Save' button.

Figure 3: Save and resume function for applications

Once you have completed your application, please select 'Submit' on the final page to ensure your application is submitted for assessment.

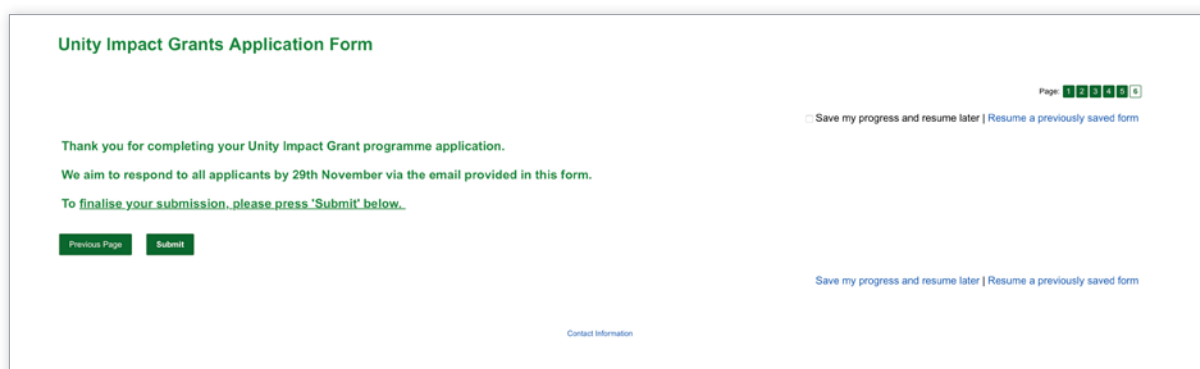
The screenshot shows the final page of the 'Unity Impact Grants Application Form'. At the top right, it says 'Page: 1 2 3 4 5 6' with the last page (6) highlighted in green. Below this are two links: 'Save my progress and resume later' (with a blue icon) and 'Resume a previously saved form'. The main content area contains the text: 'Thank you for completing your Unity Impact Grant programme application.', 'We aim to respond to all applicants by 29th November via the email provided in this form.', and 'To finalise your submission, please press "Submit" below.' At the bottom left are two green buttons: 'Previous Page' and 'Submit'. At the bottom right, there are two more links: 'Save my progress and resume later' (with a blue icon) and 'Resume a previously saved form'. At the very bottom center, there is a small link for 'Contact Information'.

Figure 4: Final page and ensure click 'submit'

Access the **Unity Impact Grant application form** in your Online Banking account or click [here](#)

6. Application form guidance


If you are ready to start your application please log into your Online Banking account where, from 2nd September, you will find the Unity Impact Grant banner and a link to the application form.

Introducing the new

Unity Impact Grant

To celebrate our 40th anniversary, Unity has pledged to donate **£40,000 to good causes in 2024**.

We're offering customers the chance to apply for a **£5,000 Unity Impact Grant** to help you deliver social impact in your community. Applications are subject to eligibility criteria.



If you're unable to access Online Banking but you'd like to apply, you can access the application form by [clicking here](#).

If you have any questions about the Unity Impact Grant, or the application process itself, please don't hesitate to get in touch, . Email the team at us@unity.co.uk with 'Unity Impact Grant' as the subject.

Please note, the donations team can only offer advice on the Unity Impact grant. If you have a general banking query please contact the Unity Customer Service team using the details at the foot of this page.

Contact us: ☎ Call us: 0345 140 1000 ✉ Email us: us@unity.co.uk 🌐 Visit us: www.unity.co.uk

*Our call centre opening hours are 9:00am to 5:00pm, Monday to Friday, excluding bank and public holidays in England or Scotland. Calls are charged at local rate. Unity Trust Bank plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Unity Trust Bank is entered in the Financial Services Register under number 204570. Registered Office: Unity Trust Bank, Four Brindleyplace, Birmingham, B1 2JB. Registered in England and Wales no. 1713124. Calls may be monitored and recorded for training, quality and security purposes. U928_1024