

*United Utilities Trust Fund*

# Organisational Grants Programme

Grant Application Form



[UUTF.ORG.UK](http://UUTF.ORG.UK)

# Applicant Information

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**Organisation Name:**

**Organisation status (Charity, CIC etc) and registered charity number (if applicable):**

**Organisation Address:**

**Website or Social media:**

**What does your organisation do? Please include current services and experience (Max 100 Words)**

**What Quality Mark(s) does your organisation hold?**

**Do you as the LEAD organisation have permission from the Financial Conduct Authority to provide free non-commercial debt counselling/debt adjustment/credit information services? If yes, please provide number and name in which it appears on the register and list all permissions granted. If FCA permissions not required please tell us why? (Max 50 Words)**

**What was your organisation's total income in the most recent financial year?**

**As part of this application you are requested to submit full details of your proposed income and expenditure for 2026/27. If you are reporting an expected deficit please provide an in-depth explanation of your strategy to address this:**

As the LEAD organisation please state your opening reserves figure for your current financial year, (e.g. reserves carried forward from the end of your last financial year)?:

Restricted (£):

Unrestricted (£):

With your application, please provide us with a copy of your monthly income and expenditure accounts for your current financial year to include:

- Opening reserves (ideally split between restricted and unrestricted funds)
- Year to date actuals and forecast to the current financial year-end on a monthly basis

Taking into account your opening reserves figure as provided above and your forecast year-end balance, please state your forecast year-end reserves:

Restricted (£):

Unrestricted (£):

If a deficit is forecast, or you can not provide this information, please provide a full explanation of your strategy to address this:

**Please give the contact information for two independent referees who may be asked to give their opinions about your idea and your organisation.** Referees must not be involved with your organisation but be aware of how you work. e.g. Another funder, Local authority or independent examiner

**Reference 1: Name**

**Reference 2: Name**

**Organisation**

**Organisation**

**Position**

**Position**

**Address**

**Address**

**Postcode**

**Postcode**

**Telephone**

**Telephone**

**Email**

**Email**

**Relationship to your organisation**

**Relationship to your organisation**

# Leadership, staffing & organisational capacity

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**Please describe your organisation's leadership and staffing structure. Include how many paid staff are employed and how many volunteers. (Max 100 Words)**

**How many staff deliver debt/money advice/financial capability? (Max 50 Words)**

**Who will have overall responsibility for delivering this programme and what do they bring to the role? (Max 50 Words)**

**Please outline any key partners involved in delivery (if applicable). Include summary of current services and experience and status are they a registered charity, voluntary organisation, not for profit or Public Benefit Entity etc. (Max 250 Words)**

**Please raise any known or perceived conflicts of interest that could relate to this grant application, whether internally within your organisation, or in respect of UUTF's decision-making process. (Max 100 Words)**

**Provide an explanation to demonstrate the robustness of the Infrastructure within your organisation and how current funding is sustained. (Max 250 Words)**

# Governance & safeguarding

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**Does your organisation have an independent governing body, e.g. trustees or directors, with at least three unrelated members where possible? If no, please explain your governance structure. (Max 100 Words)**

**Does your organisation have up-to-date safeguarding policies for children and/or adults at risk? (Tick as appropriate)**

Yes

No

**Do you have basic financial controls in place? (Tick as appropriate)**

Yes

No

In Development

**If 'yes' or 'in development', please tick all that apply:**

A bank account in the organisation's name

At least two authorised signatories on the bank account

Separation of duties (e.g. different people authorising and recording spending)

Regular review of income and expenditure by trustees/directors

Written financial procedures or policies

**If you have ticked 'No' or 'In development', please briefly explain what controls are in place and what you are working towards. (max 100 Words)**

**Do you have appropriate data protection arrangements in place? (Tick as appropriate)**

Yes

No

In Development

**If 'yes' or 'in development', please tick all that apply:**

A data protection or privacy policy

Secure storage of personal data (e.g. password-protected systems, locked files)

Limited access to personal data on a need-to-know basis

Processes for safely sharing data with partners where required

Awareness of GDPR responsibilities relevant to your work

**If you have ticked 'No' or 'In development', please briefly explain what arrangements are in place and what you are working towards. (max 100 Words)**

**Has anyone in your organisation or connected with your proposed project been accused of or convicted of corruption, bribery, fraud, modern slavery, money laundering or terrorist financing?  
(Tick as appropriate)**

**Yes**

**No**

**If you have ticked 'yes' please provide a detailed explanation of the incident, the steps your organisation has taken to mitigate its impact, and how you have changed your practices as a result.  
(max 100 Words)**

# Programme Information

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**This section asks for an overview of the programme you are seeking funding for**

**Grant amount requested (£):**

**Project timeline (e.g. Sept 2026  
- Sept 2027):**

**Primary Contact Name:**

**Position:**

**Email Address:**

**Phone Number:**

**How does your project support United Utilities customers unable to meet cost of charges for their water supply in the area?**

We cannot fund your project if it does not do the above. (Max 250 Words)

**If you have made applications to anyone else to fund this project please tell us:**

- a) Who you have applied to
- b) When you expect to know the outcome
- c) If you do not get this funding how will this affect your project?

**(max 100 Words)**

**What work do you want to do? Please include (Max 1000 words):**

- Name of Project/Programme
- How customers of United Utilities who are unable to meet cost of charges for water supply will be identified and referred to this project
- The overall vision, purpose aims of the programme
- The activities/services you will deliver over the defined period
- How you will promote the service to target these customers
- How this work builds on your current services or represents a new approach
- How will the project complement or correspond with local activities, plans policies or strategies
- How the work will evolve over the duration of the programme
- Why this programme is a strong fit for UUTF organisational funding objectives
- How will the project help customers of United Utilities to resolve their water debt or associated water issues? For example, what 'help' schemes/skills programmes/grants may you assist them to access etc?
- What type of worker will be recruited (e.g. specialist adviser/Generalist adviser) how many hours per week will they work to deliver the project - what activities will they deliver
- How might volunteers support the project and how many hours per week they will work to deliver the project?
- Provide separate Gantt Chart with application outlining key milestones and phases

**Why do you want to do this work (please focus on rationale rather than delivery detail)?**

**You may wish to consider (Max 250 words):**

- Why this programme is important for your organisation and the area
- Evidence or data showing the need for this approach
- Any insight from service users, communities, or frontline staff
- Your experience delivering similar work and what you have learned

**Who will you support and what will the impact be? You may wish to consider:**

- Who you will reach, including groups experiencing financial hardship or structural disadvantage
- How you will ensure inclusive, equitable access across communities
- The environmental impact of your proposed project
- Barriers to access and how you will reduce them
- Any partnerships or referral routes that support reach
- How many people do you expect to support each year

**(Max 250 words)**

**What outcomes will this programme achieve? You may wish to consider (Max 500 words):**

- The short, medium and long-term outcomes you expect
- How these outcomes will improve financial wellbeing or resilience
- The impact these will have
- Specific activities to achieve the above
- Indicators or KPIs you will use to measure progress
- A simple logic model or theory of change (optional)
- The potential to scale up your programme

**How will you measure, evaluate and learn from the programme? You may wish to consider (Max 250 words):**

- How you will collect data and track progress
- How you will gather feedback from participants
- How will you use learning to adapt and improve delivery IF during the term proposed outputs/ outcomes are not fulfilled

**Please complete the list below showing outputs/activities by which you intend that the project should be measured during its first year of operation. Outputs should demonstrate that the project will fulfil the aims of United Utilities Trust Fund. If the standard outputs described below are not applicable to your project or you have additional outputs you must complete the free-format output sheet on the next page.**

<b>Output</b>	<b>Q1</b>	<b>Q2</b>	<b>Q3</b>	<b>Q4</b>
How many new (unique) clients will the paid worker advise?				
If volunteers are supporting the project how many new (unique) clients will they advise? We expect a high proportion of clients to be customers of United Utilities Water. <b>Please indicate the percentage: For example 100% or less if applicable</b>				
How many advice sessions will you hold?				
How many payment plans will you set up with United Utilities on behalf of clients?				
How many applications will be made to WaterSure scheme?				
How many applications will be made to other help schemes operated by United Utilities such as Back-on-Track?				
How many clients will you identify and assist to apply for Priority Service Registration?				
How many clients will receive a benefit check?				
How many clients will be assisted in having debts re-negotiated?				
How many volunteers will be trained to assist with the project?				

**If relevant to the project, please let us know:**

**Output**

**Q1**

**Q2**

**Q3**

**Q4**

How many new or additional money advice sessions will be held through this funding?

How many new or additional money advice outreach sessions will be held?

**Below are some examples of ALL other or additional outputs/benefits. Please use this section to add the additional outputs that will be delivered by your project and use a separate sheet if required. To support your application it is important that ALL project outputs are listed:**

**Other outputs or benefits**

**e.g. number of financial capability sessions delivered**

**Q1**

**Q2**

**Q3**

**Q4**

Example: Number of financial capability sessions delivered

Example: Number of individuals participating

**S.M.A.R.T objectives**

**Please ensure your outputs are specific, measurable, achievable, realistic and timely. The success of your project will be measured against the outputs you have listed and future payments may be suspended if achievements are unsatisfactory.**

# Budget

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**Please provide a detailed budget, including:**

- Year-on-year costs
- Staff costs -hours worked (FTE, salary, on-costs)
- Direct project costs
- Overheads (with explanation of allocation method)
- Inflation assumptions
- Any additional match funding or co-funders (secured or pending) and how they will provide additional value

**Please download a copy of the budget template and complete including enough of a narrative for us to understand what the sums are for and how they have been calculated. Attach the completed budget with your application response.**

[Download Budget Template](#)

# Programme Sustainability

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**You may wish to consider:**

- How the programme will be sustained after UUTF's funding ends
- Any future funding plans or income streams
- How learning will be embedded
- The long-term impact for the community

**Please note that we recognise that not all programmes can or should continue unchanged beyond the funding period.**

# Document Checklist

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**Please ensure all additional documents are provided as listed below with your application:**

Your Memorandum & Articles/Constitution/terms of reference

Your Safeguarding policy

Your Data Protection Policy and privacy notice

Your most recent Annual Report

Your most recent audited accounts

Your most recent management accounts

Job description/person specification of proposed new posts

Information and Security policy

Your Whistleblowing policy

Your Equal Opportunities policy

Proposed income/expenditure for each year of project term

Complete and attach Budget Template

Monthly income and expenditure accounts for your current financial year

Proof of bank account

Gantt Chart/Sheet with Timescales and Milestones Throughout Term of Funding

Most recent Public Liability Insurance Policy

# Declaration

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**If successful, are you confident your organisation has the capacity to manage a grant of this size and duration, including reporting requirements?**

**Yes**

**No**

**With some support**

I confirm the information provided is accurate at the date of submission and consent to UUTF storing and reviewing this application for assessment purposes. I will notify UUTF of any material changes to the information following its submission.

Signed for and on behalf of the Recipient Organisation. The person who signs the form must be the Chairperson or Treasurer of the organisation applying for a grant.

**If the form is submitted without being signed it will not be accepted.**

**Name:**

**Position:**

**Signature:**

**Date:**

Applications and questions about the process are to be submitted to the following address:  
[communitygrants@aurigaservices.co.uk](mailto:communitygrants@aurigaservices.co.uk).

The closing date for receipt of applications is: **Tuesday 16th June 2026 12 noon.**

We are sorry that we will be unable to accept submissions that are received after the closing date.

**IF YOU HAVE NOT RECEIVED ACKNOWLEDGEMENT OF YOUR APPLICATION WITHIN 7 WORKING DAYS PLEASE CONTACT US.**

Auriga Services Ltd, 18 Bennetts Hill, Birmingham B2 5QJ (Trustees have delegated the day-to-day management of the Trust Fund to Auriga).