



Application Guidelines

We are committed to supporting great charities doing important work. We'd like to make applying to us as easy and straightforward as possible as we respect your time. Knowing the time and effort that fundraising takes, we have created our guidelines to be simple, clear and efficient to help you make your best case to us. We have listened to the questions our applicants ask us the most and covered all of these in our guidelines.

Please read these guidelines carefully. Including all the information we need means we won't have to delay things by asking you for further details. Similarly, the clearer your application is, the quicker we are able to let you know if it is successful or not.

Our guidelines cover the following:

- What we fund – the types of organisation and the work we do, or do not, fund
- Grant types
- Application format
- What to include in your application
- Major Grant guidance
- Application process

What we fund

Types of organisations we fund

We fund organisations working in the following areas:

- Arts
- Community
- Education
- Environment
- Faith
- Health
- Museums and Heritage
- Welfare
- Youth

Don't worry if your organisation works in more than one of these areas. We don't earmark funds for specific areas of work or geographic regions. Any eligible organisation that meets our funding criteria has a fair chance of being funded.

We support organisations that are one of the following:

- UK registered charities
- Charitable Incorporated Organisations
- exempt and excepted under Charity Commission guidance

To check if your organisation matches our funding, please take our simple online [eligibility quiz](#)

Types of organisations we don't fund

We follow the Charity Commission's guidance on organisations that are registered, excepted and exempt. This means that we can't fund the following:

- individuals
- Community Interest Companies (CICs)
- Community Benefit Societies
- social enterprises
- local authorities and councils

We support charities that have at least one year's worth of annual accounts. This means that to be eligible to apply, you will need to submit one of the following:

- your annual accounts, independently audited or examined
- a copy of your Charity Commission annual return

If you don't yet have accounts, please don't apply until you do as your finances are an important part of our decision making.

Work we don't fund

We are not able to fund the following activities or areas of work:

- one-off or annual events such as galas or festivals, even if they are for fundraising purposes
- short-term events that only run for a few weeks
- sponsorship
- feasibility studies
- generic or mass mailing fundraising appeals
- activity that takes place overseas, including overseas trips and emergency appeals
- rescue and emergency organisations and services e.g. mountain/sea rescue and air ambulances
- public works of art or monuments
- endowment appeals
- campaigning and lobbying if that is your organisation's main activity or purpose
- other grant-makers or organisations that make grants to individuals

- work that takes place outside of the UK (with the exception of the UK Overseas Territories, where projects can be supported)
- animal rescue organisations or animal shelters
- activities that have already taken place or projects that have already completed
- individual salaries for specific jobs*

*We don't fund the salaries of specific posts e.g. your Operations Manager. This is for the simple reason that, if we are not able to renew our support, we don't want to put a member of your staff at risk. We **do** make grants for operating/core costs which can be put towards your general running costs. We understand that your staff are vital in delivering your work and so you can use part of an operating/core cost grant towards your overall salary bill.

There are subtleties around the eligibility of the following types of organisations so please check the [FAQ](#) section of our website for our latest guidance on these:

- education institutions
- medical research charities
- hospices
- counselling charities

Our grants

The types of grant we make, no matter what size, tend to fall into one of three areas:

- operating/core costs
- capital projects
- projects/specific activities

We don't mind what you apply for but recommend you ask for what your organisation needs the most. In our experience, this tends to make a stronger application.

We encourage your organisation to have a good variety of income sources. This means that you are not too reliant on any one source or funder, which helps your organisation's financial sustainability. We are very happy to consider a grant towards your organisation or project costs but are unlikely to fund the majority of your costs.

Our Trustees are experienced grant-makers and manage the Foundation's money carefully. They will use their judgement to decide if they are able to fund your organisation and what size a grant may be. This also means that you don't have to ask for a specific amount although you are welcome to. In any event, please tell us how much money you still have left to raise.

Grant Types

Whatever type of grant you apply for, please read each section to understand what we look for and the likely scale of a grant.

Operating/core cost grants

What are they for?

These grants are made towards the general costs of running your organisation. This means they can be used to help pay your bills or rent and provide support towards your salaries.

We don't use the term 'unrestricted' as our operating/core cost grants can't be put towards endowments or building up your organisation's reserves. They are to help your organisation deliver its vital work. They are sometimes referred to as 'revenue grants' by other funders.

What do I need to consider?

If your organisation has an annual income of under £100,000 you may find it easiest to apply for a contribution to your core costs, rather than applying for a specific project. The majority of our grants are to small and vital charities so we are very open to applications for uncomplicated, core costs.

Operating/core cost grants can be made for one year, or over two or three years – we call these multi-year grants. We are more likely to make a multi-year grant if we have funded your organisation before and understood the impact of your work.

What size are operating/core cost grants?

We are not able to fund all your operating costs and the size of grant will vary depending on the size of your organisation. Please bear in mind that we are unlikely to fund more than 10% of your total annual budget.

If your organisation wants to apply for £100,000 or over (including a multi-year grant that is cumulatively £100,000 or more), we expect your annual income or project costs to be over £1 million. Please refer to our [Major Grant guidance](#).

Capital project grants

What are they for?

'Capital' means building works or repairs, or equipment that is necessary for your organisation's work.

What do I need to consider?

If you are applying for building works or repairs please take the following into consideration.

- Any relevant planning permissions should be secured before you apply to us. If you are applying for work to a religious building, we expect that faculty permissions or similar will also be in place.
- If you don't own your building, we are unlikely to make a grant unless you have at least 20 years on your lease.
- Please tell us what your organisation is doing to improve your building's environmental efficiency. If you are working towards specific energy or environmental certification (e.g. BREEAM), tell us.
- Tell us how your capital project will affect the ongoing operating costs of your organisation. For example, will a larger building cost you more to operate? If so, tell us how you will meet these increased costs. If your capital project may lead to cost savings, tell us about that!

- Please tell us who will manage your capital project and about their relevant experience.
- We expect quotes for capital projects to be up to date and no more than three months old, where possible.
- We recommend that you have around half of the total project costs raised before applying to us.
- We expect to see an appropriate contingency in your project budget which will help should your project costs rise or the project is delayed.
- Please include at least one exterior and one interior photo of the building you're applying for within your proposal. It helps to bring your project to life for us!

What size are capital project grants?

Normally, our capital grants are no more than 10% of a total project cost. However, for local community projects (e.g. village halls, community centres, places of worship, etc.), grants are likely to be no greater than £30,000 regardless of the project size. In our experience, evidence of local fundraising activity shows how much your local community values your organisation. So please tell us what you are doing to raise funds locally – it's the activity not necessarily the amounts we're interested in.

If your organisation wants to apply for £100,000 or over, we expect your annual income or project costs to be over £1 million. Please refer to our [Major Grant guidance](#).

Project/specific activity grants

What are they for?

These grants are for a specific project or area of your work. It will have a defined scope of work and timetable, for example:

- a theatre's outreach project with marginalised communities over a nine month period
- a health organisation's advice and information service over two years

What do I need to consider?

- We are unlikely to be the only funder of a project and so please tell us what other funding sources you are building into in your fundraising plan.
- We want to understand all the costs involved in delivering your project, including materials and a reasonable contribution to your organisation's core costs or overheads (up to 15%).
- We recommend you have around half the project's funding secured before applying to us.

What size are project grants?

Grants vary depending on the total cost and scope of the project however our grants tend to be 10–20% of your total project cost.

If your organisation wants to apply for £100,000 or over (including a multi-year grant that is cumulatively £100,000 or more), we expect your annual income or project costs to be over £1 million. Please refer to our [Major Grant guidance](#).

Application format

We aim to make things as simple and relevant to your organisation as possible. We're excited to hear about your work in your own words rather than asking you to fill in a long, complicated form. We ask that:

- your application is a typed document of a maximum of 10 sides of A4, in font size no smaller than 11 points. If you can tell us everything we need in fewer pages then please do although we tend to find applications with fewer than six pages don't contain enough information.
- you include all the information in this document – we cannot accept appendices
- you save the application as a PDF or Word document

Please see *Application process* for information on how to submit your application and what else you need to send us when you apply.

What to include in your application

Please read this section carefully so you know exactly what we need to know about your organisation. This means that we will be able to review your application promptly and let you know if you are successful. If we have to ask lots of questions because information is missing, it will slow your application down, something that we all want to avoid!

- Executive summary
- Your work
- Your people
- Your finances
- Your request

Executive summary

In one or two paragraphs, please summarise:

- what your organisation does
- the need it is addressing
- where you work
- the number of your organisation's beneficiaries i.e. the people you work with
- the difference it makes
- what you are asking us for

Your work

You don't have to use these specific headings, but please ensure you cover the following points:

Need

- What need is your organisation addressing? Why is it important?
- How does your work address this need: what do you do, what services do you deliver?

Impact and achievements

- What is your organisation's impact, what difference do you make?
- Who benefits from your work and how?
- Approximately how many people do you work with (your beneficiaries)?
- How do you measure success?

Equity, Diversity and Inclusion

- What is your organisation's approach to EDI?
- How is this relevant to your work? This may be in relation to your location and/or beneficiaries.
- How does this inform your work? For example you may have special projects to reach underrepresented groups.

Partnerships

We appreciate that partnerships can lead to improved services and make things more efficient. If you collaborate or partner with other organisations, please tell us about it.

Case studies

Case studies and images can help bring your application to life and illustrate the impact of your organisation's work. Please feel free to include them, especially if your work has an emotional impact and brings joy to people. When you submit your application online, you can provide a link if you'd like us to see a YouTube or Vimeo clip that shows your organisation's work and yes, we really do watch them! We just ask that you don't embed a link within your written proposal.

Your people

The voluntary sector is full of highly experienced, passionate and competent people. We support organisations with talented people and inspirational leaders who are committed to making a difference. Please include a paragraph about your senior teams' experience and the skills that your Trustees bring to your organisation.

Your finances

This part of your application is extremely important. We need to understand:

- that you have a robust plan to fund your work
- where your funding comes from
- whether you are reliant on particular funding sources
- if your local community supports your work (where relevant)

Organisations with a variety of funding sources tend to have a better chance of being financially sustainable. If there is a reason why your current funding comes from a small number of sources, please tell us why and what you are planning to do to change this going forward.

Projected income and expenditure

Whatever type of grant you are applying for, we need to see your organisation's projected income and expenditure for your coming year. This can be your financial or calendar year, whichever you use for your planning purposes. If you are applying for a multi-year grant, we need to see your projected income and expenditure for each year your application refers to.

We suggest that you provide two tables – one for your projected income and one for your projected expenditure.

Projected income

We need to see where your organisation's income is likely to come from in the year/s relating to your application. Please provide a breakdown of confirmed and target income for each of your funding sources. This should make it clear how much funding has been secured already and what your shortfall is. Your table may look like this:

| Source of income | Anticipated/ target income | Confirmed income to date | Notes |
|---|-------------------------------|-----------------------------|---|
| Contracts/ statutory funding | £200,000 | £100,000 | Local council yet to confirm renewed funding |
| Other earned income | £20,000 | £5,000 | Sales from social enterprise ongoing |
| Trusts and Foundations | £150,000 | £75,000 | Secured £50,000 from named national Trust, five pledges of £5,000 from named local Trusts. Applications pending with six other Foundations (give names) |
| Corporate donations | £20,000 | £10,000 | Companies targeted include X, Y and Z |
| Individual giving | £15,000 | £5,000 | Trustees engaged to contact friends and colleagues |
| Community events | £20,000 | £10,000 | Car boot sale and other events planned |
| Contribution from reserves | £75,000 | £75,000 | If planned |
| Subtotal of anticipated/ target income | £500,000 | | |
| Subtotal of confirmed income | | £280,000 | |
| Shortfall | £220,000 | | |

Please make sure your tables have totals that add up! You'd be surprised how many organisations forget and it can delay your funding decision.

Projected expenditure

Please provide a breakdown of how much your organisation plans to spend for the year/s relating to your application. You may want to use the same headings that appear in your annual accounts. These may be:

- salaries
- training
- programme costs
- office costs
- repairs and maintenance
- rent/utilities
- legal and professional fees
- governance

Your table may look something like this:

| Expenditure item | Amount | Notes |
|-----------------------------|-----------------|-----------------------------------|
| Salaries | £325,000 | 3 full-time and 4 part-time staff |
| Training | £25,000 | |
| Programme costs | £80,000 | Inc. materials |
| Office costs | £20,000 | |
| Repairs and maintenance | £5,000 | |
| Rent/utilities | £35,000 | |
| Legal and professional fees | £5,000 | |
| Governance costs | £5,000 | |
| Total | £500,000 | |

If you are applying for a specific activity or capital project, we also need to know the projected income and expenditure for your project.

Income plan

In simple terms, tell us what your organisation is doing to fund its work. This should include the various funding sources you have included in your projected income table. For example, please tell us:

- which other trusts and foundations you are applying to
- how you raise funds from the local community (where relevant)
- how you plan to generate earned income (where relevant)

- whether you are planning to use any of your financial reserves
- whether you receive any contract income for delivering your services

Plan B

We understand that fundraising is hard, particularly in the current financial climate. We want to understand what will happen if you can't generate all the money you need.

- Will your work be able to go ahead but on a reduced level?
- Are you able to phase work?
- Will you need to cancel and re-think?

Your application will be stronger if we can see that your organisation has thought about its options, even if plan A is preferable!

Your accounts

All registered, exempt and excepted charities are required to produce financial accounts each year. To be eligible to apply, you will need to supply us with the latest financial accounts that you are required to provide to your Charity Commission. A quick reference guide is:

- Charities with an income under £25,000 have to submit an annual return to the Charity Commission, that reports their income and expenditure for their last financial year.
- All registered charities with an annual income over £25,000 must produce an annual report and accounts each year and must also arrange for an independent person or accountancy firm to carry out either an audit or an independent examination of their charity's accounts. These rules also apply to excepted charities.

Therefore, you will need to submit either of the following:

- your annual accounts, audited or examined independently
- a copy of your Charity Commission annual return

Please tell us if there is anything unusual in your accounts or return that needs explaining. For example, you may have received a one-off legacy gift or had an unexpected one-off expense, or your reserves have been built up for a specific reason.

Your request

We know that trying to 'size' your request can be challenging. You don't have to ask for a specific amount of money, although you are very welcome to! Please be clear about what your organisation's financial need is and what its shortfall is. Our Trustees are experienced grant-makers. They will use their judgement to decide if they are able to fund your organisation and what size grant may be appropriate. Please note that the Foundation is unlikely to fund the total costs of a project.

Major Grant guidance

Grants of £100,000 and above are what we call ‘Major Grants’ and are considered by our Trustees at one of their eight Board meetings per year.

To be eligible for a Major Grant, your organisation will need to have an annual income over £1 million, or the project you are raising funds for must have a budget of at least £1 million. If this is the case and you wish to enquire about a Major Grant, please send a summary (up to a maximum of 2 sides of A4) about your organisation, what you are raising funds for, timescale, any important requirements such as planning permission timescales, costs, fundraising target and shortfall to admin@garfieldweston.org and we will be in touch with bespoke guidance.

If you are invited to apply, we will let you know which of our Trustees’ Board meetings your application will be discussed at and what your application deadline is. If you are not invited to apply for a Major Grant but are eligible to apply to us for a smaller amount, you will be able to submit a Regular Grant application at any time via our website.

Application process

We believe in keeping things simple! Whether you’re looking for operating/core costs or funds for a project, you can apply either for a Regular Grant (under £100,000) or a Major Grant (£100,000 and over). The following sections tell you what the process is for each of these grant programmes.

Regular Grant – under £100,000

- We have a simple one step process.
- We are open to applications all year round and don’t have any deadlines for you to meet. You can apply when you wish.
- We will be in touch if we have any questions about your application. Otherwise we will be busy reviewing your application and won’t trouble you!
- Trustees decide on the outcome of every application and what size grant may be possible.
- It takes a maximum of four months from submitting your application to learning whether or not you’ve been successful.
- We will email you the outcome of your application so please make sure you let us know if the key contact details for your organisation change.
- If you are offered a grant, we will send you our [grant terms and conditions](#) and ask you to submit your organisation’s bank details via your online account.
- Your grant will be paid into your organisation’s bank account within 14 days. If you are offered a pledge, our email will be clear about any specific conditions that have to be met before you can ask for your pledge to be released.

Whether you are successful or not, you will not be able to make another application until at least 12 months have passed from the date of our email advising you of the outcome of your most recent application.

Major Grant – £100,000 and over

- Please send a two-page summary of your organisation and what you are raising funds for (including costs, timescale and fundraising plan) to admin@garfieldweston.org.
- We will be in touch to give bespoke guidance. This may be to advise you to apply for a smaller amount, or to discuss next steps in relation to a Major Grant application.
- If eligible, you will be invited to apply to one of our eight Trustee Board meetings a year. We will aim to arrange a meeting with you, our Director/Deputy Director and at least one Trustee before the Board meeting.
- You will be contacted by our Director/Deputy Director within 48 hours of the Board meeting to learn of the Trustees' decision.
- If you are offered a grant, we will send you our [grant terms and conditions](#) and ask you to submit your organisation's bank details via your online account.
- Your grant will be paid into your organisation's bank account within 14 days. If you are offered a pledge, our email will be clear about any specific conditions that have to be met before you can ask for your pledge to be released.

Whether you are successful or not, you will not be able to make another application until at least 12 months have passed from the date of our email advising you of the outcome of your most recent application.

Whatever you're applying for, we wish you every success. We look forward to reading your application soon.