

Application Guidelines

We are committed to supporting great charities doing important work. Please read these guidelines carefully to help you put together your proposal to us. They cover the following:

- what we fund – the types of organisation and the work we do, or do not, fund
- our grants
- application process
- proposal format for Regular and Major Grants
- what happens next

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 (CIOs)
- 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 are unable to 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 wait until you do as your financial track record is an important part of our decision making.

Work we don't fund

We are unable 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 outside of the UK (with the exception of the UK Overseas Territories, where projects can be supported)
- rescue and emergency organisations and services, e.g. mountain/sea rescue and air ambulances
- international trips and emergency appeals
- 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
- animal rescue organisations or animal shelters
- activities that have already taken place or projects that have already completed
- individual salaries for specific posts*

*We are unable to fund the salaries of specific posts, e.g. your Operations Manager. This is because, if we are not able to make another grant, 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, including your overall salary costs.

There is further information related to the following types of organisations. If these apply to you, please check the [FAQ](#) section of our website.

- universities
- schools
- medical research charities
- hospices
- counselling charities

Our grants

The types of grant we make fall into one of three areas:

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

We recommend you ask for what your organisation needs the most. In our experience, this tends to make a stronger application.

Whatever type of grant you apply for, please read each section of these guidelines 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 running costs of 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.

What do I need to consider?

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 understand the impact of your work.

What size are operating/core cost grants?

If successful, we generally support around 10-20% of an organisation's total annual budget.

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 still to run on your lease.
- What is your organisation doing to improve your building’s environmental efficiency? If you are working towards specific energy or environmental certification (e.g. BREEAM), tell us.
- How will your capital project 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!
- Who will manage your capital project? Tell us about their relevant experience.
- We do not require copies of quotes for capital projects but do expect you to have up to date estimates/budgets. They should be no more than three months old, where possible.
- We expect to see an appropriate contingency in your project budget which will help should your project costs increase or the project is delayed.
- 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.
- We expect to see evidence of local fundraising activity to demonstrate your community’s commitment towards your project.

What size are capital project grants?

- We expect you to have secured around 50% of capital funding prior to coming to us. Our support tends to be approximately 10–20% of your capital costs.
- 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.

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 communities over a nine month period
- a health organisation’s advice and information service over two years

What do I need to consider?

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%).

What size are project grants?

We expect you to have secured around 50% of your project funding prior to coming to us. Our support tends to be approximately 10–20% of your costs.

Application process

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

If you are interested in applying for a Regular Grant, please complete our Eligibility Quiz on our website to check that your organisation is eligible. If your organisation is eligible, please complete our online application form and submit your proposal. Details of how to do this can be found [here](#).

- We are open to applications all year round and there are no deadlines for submission.
- We will be in touch if we have any questions about your application. It takes a maximum of four months from submitting your application to learning the outcome. We will contact you via email so please ensure we have an up-to-date contact for your organisation at all times.

Major Grant – £100,000 and over

Grants of £100,000 and over are part of our Major Grants and these are considered by our Trustees at one of eight Board meetings per year.

To be considered for a Major Grant, your organisation must either have an annual income of over £1 million, or your total project or capital costs must be over £1 million.

We have the following types of grants:

- Capital or project costs: the total cost of your project (capital or revenue) must be at least £1 million regardless of your organisation's annual income.
- Core costs: for this type of grant, your organisation's annual income must be at least £1 million. These grants should be used to support general running costs.

If you are interested in applying for a Major Grant, please complete our Eligibility Quiz on our website to check that your organisation is eligible. If your organisation is eligible, please complete our online Expression of Interest Form, where you will be asked a few questions about what your organisation does, what it is raising funds for, how much the project costs, what the shortfall is and any relevant timings. Details of how to do this can be found [here](#).

You can submit an Expression of Interest all year round and there are no deadlines for submission. All Expressions of Interest will be carefully reviewed on a rolling basis and we will

be in touch with next steps. If your Expression of Interest is taken forward, then you will be invited to submit a full proposal (see below for details) for consideration at one of our board meetings.

Proposal format for Regular and Major Grants

We want to hear about your work in your own words rather than ask you to fill in a long, complicated form. We ask that:

- your proposal is a typed document of a maximum of 10 pages of A4, in font size no smaller than 11 points – if you can tell us everything we need in fewer pages then please do so
- you include all the information in this document – we cannot accept appendices
- you save the proposal as a PDF or Word document

Please read this section carefully so you know what to include in your proposal.

Executive summary

In one or two paragraphs, please summarise your proposal by outlining:

- what your organisation does
- the need it is addressing
- where you work
- how many people your organisation or project supports
- 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?

Reach and impact

- What is your organisation's impact, what difference do you make and how do you measure it?
- Who benefits from your work and how?
- Approximately how many people do you support?

Equity, Diversity and Inclusion

- What is your organisation's approach to Equity, Diversity and Inclusion?
- How does this inform your work? This may be in relation to your location and/or people you support.

Partnerships

We appreciate that partnerships can lead to improved services and more people accessing the support they need. 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. When you submit your application online, you can provide a link to a video, e.g. YouTube, that shows your organisation's work.

Your people

The voluntary sector is full of highly experienced and passionate people. 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 proposal is extremely important. We need to understand:

- that you have a robust plan to fund your work
- where your funding comes from – including how much secured income you have

We encourage organisations to have a variety of income sources and not be reliant on any one source or funder.

Projected income and planned expenditure

Whatever type of grant you are applying for, we need to see your organisation's projected income and planned expenditure for your coming year. This can be your financial or calendar year, whichever you use for your planning purposes. There are additional requirements, depending on your application.

- If you are applying for a multi-year grant, we need to see your projected income and planned expenditure for each year your application refers to.
- If you are applying for a project or capital grant, we need to understand your total project costs and how much income you have secured to date.

We suggest that you provide two tables, one for your projected income and the other for your planned 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 target income and confirmed income for each of your funding sources. 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.
Corporate donations	£20,000	£10,000	Secured £10,000 from X Company
Individual giving	£15,000	£5,000	Trustees have pledged £5,000
Community events	£20,000	£10,000	Car boot sale income
Contribution from reserves	£75,000	£75,000	If planned
Totals	£500,000	£280,000	

Planned expenditure

Please provide a breakdown of how much your organisation plans to spend for the year(s) relating to your application. Headings may include:

- salaries
- training
- activity costs
- office costs
- building costs, refurbishment, roof repairs, materials (these apply to capital requests)
- 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	
Activity costs	£80,000	Inc. materials
Office costs	£20,000	
Building costs	£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 planned income and expenditure for your project.

Budget summary		Notes
Total planned expenditure	£500,000	
Total income secured	£280,000	
Total shortfall (expenditure – secured income)	£220,000	

Income plan

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. Please tell us:

- Which other trusts and foundations are you applying to?
- How do you raise funds from the local community? (where relevant)
- How do you plan to generate earned income? (where relevant)
- Are you planning to use any of your financial reserves?
- Do you receive any contract income for delivering your services?

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 your 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.

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 plan to.

- 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. 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 must 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 have 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.

What happens next

Key things to remember:

- We will contact you via email or phone so please ensure we have an up-to-date contact for your organisation at all times.
- If you are offered a grant, we will send you our 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 10 working 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.
- All decisions are made by our Trustees.
- After your proposal is considered by the Trustees, you will be unable to make another application until at least 12 months have passed from the date of the outcome email.

We wish you every success in your fundraising and all your good work. We look forward to reading your application soon.