

Trusthouse Charitable Foundation

GUIDELINES FOR APPLICANTS

About the Trusthouse Charitable Foundation

Trusthouse was formed in 1997, when the Council of Forte inherited shares in Granada. Grants are made from the total return on its investment portfolio. It is governed by a Board of Trustees.

Trusthouse currently awards around 350 grants a year totalling circa £2 million. The average grant is circa £6,000 though they can range from £1,000 to £30,000.

Trusthouse is administered on a day-to-day basis on behalf of the Trustees by the Henry Smith Charity. Each charity is entirely independent: applicants can apply to both charities at the same time.

About our Grants Programme

The Trustees completed a review of the grants criteria in 2008 and have decided on a new policy, which gives more focus to Trusthouse's grantmaking, concentrating grants on areas and charities where our grants can have the greatest impact.

There are currently two **overarching themes** to our grants:

Rural Issues: we accept applications from local and national charities or not-for-profit organisations which are addressing issues in needy rural areas. 'Rural' in this context means cities, towns, villages and areas with 10,000 or fewer inhabitants. We are interested in, for example, projects providing transport for the elderly, disabled or disadvantaged; contact networks for young disabled people; projects which encourage a sense of community such as community centres and village halls; employment training schemes especially those promoting local, traditional crafts; projects addressing issues such as drug/alcohol misuse or homelessness.

Urban Deprivation: we accept applications from local or national charities or not-for-profit organisations which are working with residents of urban areas (i.e. more than 10,000 inhabitants) which are classified in the latest government Indices of Multiple Deprivation as being in the lowest 20%. We are interested in, for example, youth clubs; training schemes to help people out of unemployment; drop in centres for the homeless.

Your application should clearly demonstrate how your project fits into one or other of these themes by telling us about the area in which the project takes place, its challenges and how your project addresses these issues.

The examples given above are only a small snapshot of the types of project in which we are interested. See also the greater explanation given under *What sort of projects will Trusthouse fund?* If you are unsure if your project fits, please call us for an informal discussion.

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What sort of projects will Trusthouse fund?

Within our overarching themes listed on the previous page, Trusthouse funds in three broad areas: Community Support; Disability & Healthcare; Arts, Education and Heritage.

Community Support	<p>Community: support of carers; projects in deprived communities including community centres offering (for example) employment advice, training, debt counselling; provision of sporting facilities or equipment in deprived areas;</p> <p>Drugs and Alcohol: rehabilitation of substance and alcohol mis-users</p> <p>Elderly: projects addressing isolation and loneliness (e.g. befriending schemes and luncheon clubs); domiciliary support (e.g. respite for carers), residential improvements/adaptations</p> <p>Ex-offenders: projects (including creative arts) working with prisoners and ex-offenders to improve their life skills and reduce re-offending;</p> <p>Young People: projects which build the confidence, life skills and employment skills of young people in need; holidays for deprived children and young people</p>
Disability and Healthcare	<p>Physical and Mental Disability: projects involving rehabilitation, (including related arts and sport programmes); projects for ex-service men and women (including former employees of the emergency services); projects for children (including holidays); and respite care</p> <p>Hospices & Palliative Care: the provision of domiciliary care; support for volunteers and carers; outreach services; the refurbishment of premises; the provision of equipment (<i>excluding in all cases services or costs which are normally funded from statutory sources</i>)</p> <p>Medicine: support services (e.g. specialist medical helplines) for those suffering from life limiting illnesses (medical research projects are not included).</p>
Arts, Education and Heritage	<p>Arts: projects which enable the disabled and people living in areas of need and poverty to participate in the performance arts and to experience artistic excellence in the performing arts; projects which encourage and give opportunities to young talented people whose circumstances might otherwise deny them;</p> <p>Education: projects which help children at risk of exclusion or with exceptionally challenging behaviour to realise their educational potential; projects which encourage and give opportunities to young talented people whose circumstances might otherwise deny them access to further/higher education;</p> <p>Heritage: smaller heritage projects, with a particular interest in industrial and maritime projects in areas of deprivation, which provide employment and/or volunteering opportunities for the local community and contribute to the regeneration of the area.</p>

Please also check the **list of projects we do not usually fund on Page 4**, and call us for an informal discussion if you are in any doubt.

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What types of grant are available?

Trusthouse has three grants schemes: Large Grants, Small Grants and Fast Track Grants.

Scheme	Grant Amount	Type of appeal	Timing
Large Grants Scheme	For applications between £10,000 and £30,000	This scheme is for capital appeals only (e.g. buildings including new build, renovations, extensions). The total amount of the project must not exceed £1 million. Organisations must normally have an annual income under £5 million (excluding hospices).	Decisions on Large Grants are made four times a year. Applicants will receive an initial acknowledgement, and a further letter within 4-6 weeks confirming whether or not the appeal will be considered at the next available grants meeting. Applicants should allow up to 4 months for a final decision.
Small Grants Scheme	For applications between £5,001 and £9,999	This scheme is for revenue and/or capital costs . Revenue costs include core costs and salaries. Organisations must have an annual income under £300,000.	As for Large Grants above.
Fast Track Scheme	For applications of £5,000 and below	Like the Small Grants Scheme, this scheme is for revenue and/or capital costs . Revenue costs include core costs and salaries. Organisations must have an annual income under £300,000.	Appeals under the Fast Track scheme will be given a final decision within 6-8 weeks from the date of application under normal circumstances.

All grants are for 1 year only.

Where does Trusthouse fund?

We consider applications from charities or not-for-profit organisations based anywhere in the UK.

We also grant aid a small number of projects in developing countries which are funded and run by charities or not-for-profit organisations based anywhere in the UK. Please contact the office for an initial discussion.

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What will Trusthouse not fund?

- Animal welfare
- Applications for revenue funding for more than one year
- Capital appeals for places of worship
- Grant making organisations or umbrella groups
- Grants for individuals (including bursaries through a third party organisation)
- Feasibility studies and evaluations
- Local Authorities
- Local Education Authority schools, privately funded schools or their Parent Teachers Associations, except if those schools are solely for students with Special Needs
- Medical research projects
- Office IT equipment
- Organisations that have received a grant for three consecutive years from the Foundation
- Projects involving the start-up or piloting of new services including new charities/ organisations
- Projects where the primary objective is environmental or conservation
- Projects where the primary objective is the promotion of a particular religion
- Renovation or alteration projects to make a building compliant with the Disability & Discrimination Act
- Retrospective funding for capital projects which have already started or completed
- Revenue funding for organisations with an income of over £300,000 per annum
- Services operated by the NHS; medical or other equipment for NHS hospitals
- Social research
- Training of professionals within the UK
- Universities

Under normal circumstances, Trusthouse is not currently funding projects which are for:

- the purchase of computers or other electronic equipment
- PR or other awareness raising campaigns, including the publication of leaflets, newsletters or events calendars
- organisations which have been in existence for less than 12 months

What else should we be aware of?

You should also note that Trusthouse is not usually a sole funder or starting funder: applicants should have applied to local sources of funding and have a reasonable proportion of the funding needed in place (or have a plan for raising the funds) before making an appeal.

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How to make an application

All applicants must complete an application form (which can be downloaded from Trusthouse's website or sent by post/email on request to the office) which summarises their appeal. All sections of the form must be completed fully: it is not sufficient to refer to "see attached documents". Applicants are also required to provide supporting information on approximately two sides of A4 in accordance with the following guidelines:

Applicants should:

- a. State clearly **who they are, what they do and whom they seek to help.**
- b. Give the applicant's **status**, e.g. registered charity.
- c. **Describe clearly the project** for which the grant is sought answering the following questions:
 - What is the aim of the project and why is it needed?
 - What practical results will it produce?
 - How many people will benefit?
 - How the project fits within the Rural Issues and/or Urban Deprivation themes by describing the area in which the project will take place and how the project addresses the challenges/problems of the area
- d. State what **funds have already been raised and from whom** for the project, and name any **other sources of funding being applied for.**
- e. Include a **detailed budget** for the project (this may be given on a separate sheet)
- f. Ask for a **specific amount.**
- g. Explain how the project will be **monitored and evaluated.**
- h. Explain where **on-going funding** (if required) will be obtained when the Foundation's grant has been used.
- i. Include the organisation's **most recent accounts** agreed by an Auditor or Independent Examiner. If these accounts show a significant surplus or deficit, please explain.

Please keep the application as simple as possible and avoid the use of technical terms, acronyms and jargon. Please do not send DVDs or CDs or refer to websites for additional information.

We aim to notify applicants by letter that their appeal is being considered within 2 weeks of receipt. If you do not receive a letter by this time, please contact the office.

If you have any queries about completing the form or the additional information you should supply, please contact the office.

Your completed application should be sent by surface post to:-

**Miss Judith Leigh
Grants Manager
The Trusthouse Charitable Foundation
6th Floor, 65 Leadenhall Street
London EC3A 2AD**

Tel: 020 7264 4990

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Other Information

- Grants Committee meetings are held four times a year. Please contact the office or refer to the website for the deadlines for submitting applications which is generally 2 months before the date of a meeting.
- Applicants who are unsuccessful are required to wait a minimum of six months from the date of notification before reapplying.
- Applicants who receive a grant are not eligible to apply again until 12 months after the date of the grant award. Please note, however, that the Trustees usually prefer not to fund year on year.
- Applicants whose appeals are outside the Foundation's objects or current grants policy criteria will be notified within four weeks of receipt.
- The Foundation reserves the right to share the details of grant applications with other grant makers, unless the applicant expressly indicates otherwise when applying.
- Successful applicants will be paid on award of the grant (for revenue appeals) or on production of copies of invoices/architect's certificates (for capital appeals).
- Successful applicants are required to submit a progress report six months after the date of payment of a grant.
- Large Grants applicants will be visited or interviewed by telephone prior to their appeal being submitted to the Grants Committee so that an assessment report can be prepared.
- Trusthouse reserves the right to request a visit to any grant applicant either before or after the award of a grant to monitor the progress of a project and measure the impact of its grantmaking.