

# Applying to Charitable Trusts



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**0845 300 1818**

All grant making trusts are charities. Those based in England and Wales are registered with the Charity Commission, like other charities of their size. A grant making trust can make tax free donations, it doesn't pay tax on its income.

## Researching the appropriate Trusts

You need to know what a trust is looking for in order to fulfil its criteria. You should be clear about what you need to find out about the different Trusts. It is relatively easy to find out their addresses and a contact but there are other points you need to identify before you make an approach.

- What are the main areas a Trust is interested in i.e. youth work, welfare etc.
- What type of activity is the Trust willing to support? (construction, excursions etc.)
- What type of funding is the Trust willing to consider?
- Are there any restrictions/exclusions on funding?
- Is there a specific area the Trust focuses on?
- What is the size of grant the Trust is able to give?
- How long will the Trust support a project for?
- What are the Trust's policies relating to financial matters? (i.e. is there a limit on the amount of income or reserves of the charity applying?)

Once you have identified your Trust you need to make the right approach for funding:

## Making the case for funding

Pull your case together as a 'project' rather than having a wish list of everything that is needed.

You should include in your letter to the Trust:

- Introduction:- Context and Overview
- About your Organisation: - why are you doing the job and not someone else?
- The Project: - What you intend to do? Why do you want the money?
- Justification: - How does the project meet the need you have identified?
- Costs and Funding: - Work through the project budget and any other opportunities for funding you have identified.
- End of the Project: - What do you plan to do once the initial funding runs out? Have you considered other fundraising ideas?

## What is a Trust looking for?

Initially a Trust will look at a letter of application for the following points: -

- Does the Application fit the purpose of the Trust?
- Is the request generally within all policies and priorities of the Trust?
- Can the Trust afford the amount the charity is asking for?

## The Scout Information Centre

Gilwell Park Chingford London E4 7QW Tel + 44 (0)20 8433 7100 Fax + 44 (0)20 8433 7103 email [info.centre@scout.org.uk](mailto:info.centre@scout.org.uk) [www.scoutbase.org.uk](http://www.scoutbase.org.uk)

- How well does it fit the purposes of the Trust?
- Can the charity fulfil all its aims and objectives?
- Does the project fit into the funding priorities of the Trust?

Most applications should be made by letter, very few Trusts appreciate phone calls or issue application forms. You should find this out at the beginning of your research.

One of the most important things to show in your application is confidence. You should show a strong evidence of need for the project you are asking for the money for, thorough research into your own project and its aims and objectives should show this. You need to have well thought through plans including evidence that you have thought about what happens when funding runs out. The Trust will need to feel confident that the people involved in the project are capable and reliable. This could involve telling the Trust about past achievements, individuals and their abilities and commitments.

### **After the grant**

If you are successful in your approach and a grant is awarded the work will not stop there. You will probably be asked to produce regular reports that will enable the Trust to monitor your progress. Sometimes the Trust in question might phone you to complete their own report, they might even be double checking to ensure what you have told them previously is correct. Some Trusts conduct monitoring visits, again this might be because they are producing their own report or they are checking up on you. If you have to prepare a regular report you should agree the format and content with the Trust beforehand, then you can adapt and update it as needed. The danger with this can be that you want to impress the Trustees and therefore spend time making it unnecessarily long and it will include too much information that is not needed. This will make a simple task over complicated and stressful. It is extremely important to establish and maintain a good relationship with a Trust, you never know when

you may need to approach them again, and by maintaining and developing the relationship you are increasing the chance of further support.

### **Final points to remember**

- Always say 'Thank you' when you receive an offer of funding and when the money itself arrives, this will show the Trust how much you value their support therefore leaving a good impression.
- Never send circular appeals. Every letter of application should be unique to comply with the criteria of the Trust.
- If you want an acknowledgement of your application always send an S.A.E.
- Check deadlines for applications but make sure you make the best application possible even if it means delaying it
- Try and get someone unfamiliar with Scouting to read your letter of application.
- Make copies of applications for future reference.

### **Suggested Reading**

The Directory of Grant Making Trust - published by the Directory of Social Change. (Also available on CD-ROM)

A Guide to Major Trusts 3 Vols. - published by the Directory of Social Change

Funderfinder - available from CVS (Council for Voluntary Service)

### **Contacts**

Further information can be obtained from the Fundraising Department.

Tel: 0845 300 1818

Email: fundraising@scout.org.uk