

THE EQUITABLE CHARITABLE TRUST

Guidelines for Applicants

November 2013 – November 2014

Grant Making Policy and Priorities

The Equitable Charitable Trust is an education charity. We make grants totalling up to £1 million each year towards projects for children and young people under the age of 25 who are from disadvantaged backgrounds or disabled.

Demand for our funds is high. Trustees have therefore identified three specific priorities for the types of projects they wish to support. The priorities are set out below (in bullet points) under headings that describe the area of our grant making to which they refer:

Disabled children and young people in the UK

- **education projects and services that support the learning and development of disabled children and young people.**

This is the broadest of our priorities and a wide range of education projects can be supported (please refer to the List of Grants on our website for examples). Services that provide advice and support with formal education can be supported. However, services or projects that provide more general advice and guidance (e.g. a helpline providing advice about a particular disability) will not be funded.

Disadvantaged children and young people in the UK

- **formal education projects for disadvantaged children and young people that support delivery of the National Curriculum (i.e. curriculum enrichment projects) or that deliver accredited vocational learning that will increase employability.**

By “curriculum enrichment projects” we mean work that is directly linked to delivery of the National Curriculum (or the Curriculum of Excellence in Scotland). In practice this normally means that work will be taking place as part of the school day. A literacy support project that takes place in a youth or community setting during evenings or weekends, although relevant to the English curriculum, would not be considered a curriculum enrichment project. Under the second part of this priority (“accredited vocational learning”) precedence will be given to projects that deliver accredited employment-related training (e.g. trade training courses) and to accredited vocational projects that include support and can demonstrate success in moving young people on into employment, work experience or further training.

Disadvantaged and disabled children and young people in developing countries

- **education projects that will help increase participation in, or improve the quality of, education for disadvantaged or disabled children and young people in developing countries.**

We particularly wish to support projects with potential to deliver benefits over the medium to long term. Grassroots projects without a strategic element, such as those that support pupils by paying their school fees or purchasing school uniforms, are unlikely to be funded. Only UK registered charities are eligible to apply for overseas projects and they must have an Anti-Bribery Policy.

Please note that, under all the above priorities, PSHE and Citizenship related projects are a low priority and are very unlikely to be funded.

You should tell us in your application which priority your project addresses and how. Your project need only be relevant to one priority.

Types of Grant

Grants can be made for project costs, capital expenditure, equipment and/or the salary costs of a post.

A portion (pro-rata) of your organisation's core costs may be requested as part of an application towards a project or salary (e.g. using the principles of Full Cost Recovery). However, we do not make grants exclusively for core costs.

Area of Benefit

The majority of projects we fund take place in the UK at local or regional level, though national projects and those benefiting children or young people overseas (in developing countries only) are also supported.

Types of Organisations Funded

We support a broad range of organisations; from small and medium sized not-for-profit organisations to larger charities. However, priority is given to organisations and charities with annual incomes of under £5 million. Above this figure, the larger an organisation or charity, the less likely we are to make a grant.

You do not need to be a UK registered charity to apply, unless you are an independent special school or you are applying for a grant towards a project or work that will take place outside the UK.

Schools and colleges are not eligible to apply, unless they are an independent special school or college with registered charity status (see list of exclusions for more info).

All applicants must supply audited or independently inspected accounts. If your organisation or charity is new and does not yet have accounts, we will not be able to consider your application.

Length of Grants

We are in the process of spending out and are now only able to offer one year grants. Any work that is funded must be completed by the autumn of 2015.

This means that we are unlikely to offer grants to projects or large capital appeals where a significant amount of money still needs to be raised.

The final date we will be accepting applications is Friday 28th November 2014.

If you receive a grant you will need to submit your final report by the end of 2015.

Size of Grants

The size of grants ranges from £3,000 to £30,000. Most grants made will be for sums between £5,000 and £20,000.

What Cannot be Funded

The Trust **does not** make grants towards the following:

- General appeals or mail shot requests for donations (all applications should follow the guidelines set out below)
- projects felt to be more akin to social work or youth work than education
- Informal education projects and those that are only loosely educational (our definition of informal education includes projects in youth work settings such as money management, drug & alcohol awareness and healthy eating, whether or not the activities are accredited)
- therapeutic treatments (including music and play therapy)
- Supplementary Schooling, Homework Clubs or Mother Tongue Language Classes
- Pre-School education projects (unless these are solely for the benefit of children with disabilities or special needs)
- Project/salary costs that will benefit only a single child (we would not fund the cost of an additional worker to support a disabled child attending a mainstream or integrated nursery, for instance)
- Local Authorities
- The only schools and colleges eligible to apply are independent special schools/ colleges with registered charity status. State maintained or voluntary aided schools, academies, colleges, universities, public schools or independent schools not exclusively for disabled children or young people, are not eligible to apply, either directly or via a related charity (e.g. Friends, PTAs). We are also unable to fund groups of schools (e.g. set up as a partnership or registered charity) which are seeking funding for services that were previously provided by their local authorities
- Sports education, facilities or activities (e.g. playing fields, sports clubs) or projects that are delivered through the medium of sport
- Salaries for posts that are not directly related to service delivery (we would not fund the salary of a fundraiser or book-keeper, for instance)
- Projects in the UK that are primarily to deliver training to adults, staff or teachers (even if children or young people will be the ultimate beneficiaries of this work)
- The purchase of minibuses or vehicles
- Individuals
- Bursary or scholarship schemes
- Projects that promote religious belief or practice
- Holidays, recreational activities or overseas trips and travel
- Capital applications for equipment or facilities that will be only partly used for education or by under 25s from disadvantaged or disabled backgrounds (e.g. outdoor education centres that also deliver recreational activities, or that are not exclusively for the use of disadvantaged or disabled children and young people)
- Retrospective requests for work that has already taken place
- New organisations not yet able to supply audited or independently inspected accounts
- Sole traders or organisations such as companies limited by shares whose constitutions allow the distribution of profits (whether or not this happens in practice).

How to apply

Applications must be submitted by post (we do not accept emailed applications). We

operate a rolling programme and split our budget evenly across the year. Applications can be submitted at any time until Friday 28th November 2014.

Applications are considered monthly by the Trustees. You will normally receive a decision within eight weeks of submitting your application. In some cases in-principle decisions are made, subject references, further information or a visit being arranged.

If you apply and are unsuccessful, you cannot apply again for at least six months from the date on the letter we send to tell you about our decision.

We do not have an application form, but recommend that organisations follow the guidelines outlined below when applying for a grant:

- Applications should be a maximum of four or five sides of A4, in font size no smaller than 11 point and should begin with a short (half page) summary.
- The following documents must be included with your application:
 - a detailed budget
 - your organisation's latest full audited or independently inspected accounts
 - a job description (if your request is specifically towards the cost of a salary)
- Please do not send us CD-Roms, DVDs or glossy annual reviews.
- Applications should:-
 - describe your organisation, its background and track record, what it does and who it seeks to benefit or help.
 - provide details of your organisation's status (e.g. registered charity, company limited by guarantee) and its trustees.
 - state the name of the project you are asking us to fund, and clearly and succinctly describe it; explain what the structure of the project will be; why it is needed; the number of people who will benefit from it; their ages; how you will ensure it is cost effective; provide details of any partners (other organisations, statutory bodies etc), and say what stage the project has so far reached and when you need the funding to start (or, if the project is new, its likely start date). If young people are involved in the development or monitoring of the project please provide details.
 - explain which priority your project addresses and how it meets the priority.
 - describe the aims of the project and what outcomes (practical results, changes and/or improvements) it hopes to achieve. If you are seeking funding to continue an existing project or a pilot, it is important you are able to provide evidence of work's effectiveness and outcomes achieved to date.
 - describe how the aims and outcomes of the project will be monitored and evaluated, how you will know to what degree it has been successful or achieved its aims and, where appropriate, how you will disseminate good practice to others.
 - describe how the project will be managed and name the people who will be in charge of it and their relevant experience or qualifications. If the application is specifically for a salary, include a copy of the job description.
 - ask for a specific amount.

- ❑ enclose a detailed budget for the work you want us to fund and, if this forms part of a larger project please include the full budget for that project , together with a full copy of your organisation's most recent audited or independently inspected accounts. It is important, if the accounts show a significant surplus or deficit of income, that you explain the reason for this.
 - ❑ include a detailed fundraising strategy for your project, including details of funds already raised and what other funding you have or plan to apply for. This is important as we may not be able to offer the full amount you request.
 - ❑ explain where on-going funding (if required) will be obtained when our grant ends.
 - ❑ provide the names and addresses of two independent referees that know your organisation's work. Tell us who these individuals are and how they/their organisations are connected to yours. Trustees, current volunteers or beneficiaries are not suitable referees.
- Please keep your application as simple as possible and avoid the use of technical terms and jargon.

The success rate of eligible applications is around one in five. The volume of applications we receive means that, regrettably, we often have to turn down good applications.

A list of the grants we paid last year is available on request and can also be downloaded from our website. Please note, however, that many of these grants were made several years ago, and do not reflect our current grant policy.

Copies of our standard terms and conditions of grant and our guidance on our monitoring requirements can be found on the Info for Grantees page of our website.

If you have any queries on these guidelines, or are unsure whether your project meets our priorities, please contact us for advice.

These guidelines are available in large print or by email on request.

Please tell us which font size you would like to receive them in, and whether you would like them posted or emailed to you.

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