

THE EQUITABLE CHARITABLE TRUST

Guidelines for Applicants

Grant Making Policy

The Equitable Charitable Trust is an education charity. It makes 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.

Its funds are highly oversubscribed and the Trustees have therefore identified three specific priorities for the types of projects they wish to support:

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

You should tell us in your application how your project addresses our priorities. Your project need only be relevant to one.

For overseas projects, Trustees 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 which support students by paying their school fees or purchasing school uniforms, are unlikely to be funded.

Types of Grant

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

Area of Benefit

The majority of projects funded by the Trust 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.

Please note that grants for overseas projects are only made through UK registered charities.

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

Length of Grants

The length of funding can range from one to three years. Grants of more than one year are paid in annual instalments, with instalments beyond the first year dependent on receipt of progress reports that are satisfactory to the Trustees.

Size of Grants

The size of grants ranges from £2,500 to £30,000. Most are for sums between £5,000 and £20,000. It is rare for a multi-year grant to exceed £10,000 p.a. and most multi-year grants will be for sums between £5,000 and £7,500 p.a.

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)
- Informal education projects and those that are only loosely educational
- projects felt to be more akin to social work than education
- therapeutic treatments
- Supplementary Schooling and Homework Clubs
- Mother Tongue Language Classes
- State maintained or voluntary aided schools, colleges or universities, either directly or via another charity (e.g. Friends, PTAs)
- Local Authorities
- Public Schools or Independent Schools that are not specifically for children and young people with disabilities or Special Educational Needs
- Sports education, facilities or activities (e.g. playing fields, sports clubs, or projects that are delivered through the medium of sport)
- Projects or work related to the Olympic Games or Cultural Olympiad
- Salaries for posts that are not directly related to service delivery (we would not make a grant towards the salary of a fundraiser or book-keeper, for instance)
- Minibuses
- Pre-School education projects (unless these are solely for the benefit of children with disabilities or special needs)
- Individuals
- Bursary schemes
- Projects that promote religious belief or practice
- Holidays, recreational activities or overseas trips
- 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).

How to apply

Applications can be submitted at any time and are considered monthly by the Trustees.

The Trust does not have an application form, but recommends that organisations follow the guidelines outlined below when applying for a grant:

- Applications should be no longer than four A4 sides, in font size no smaller than 11 point and should begin with a short (half page) summary. Your budget and accounts are additional to this.
- 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. If young people are involved in the development or monitoring of the project please provide details.
 - explain which of our priorities your project addresses and how it meets the priority.
 - say what the aims of the project are 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 that you are able to demonstrate the effectiveness of the work and what the outcomes have been to date.
 - describe how the aims, progress and outcomes of the project will be monitored and evaluated 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 for a salary, please include a copy of the job description for the post.
 - ask for a specific amount.
 - enclose a detailed budget for the full duration of the project (i.e. if it is a three year project don't just send us a one year budget!), together with a full copy of your organisation's most recent audited or independently inspected accounts. It is important that if the accounts show a significant surplus or deficit of income, you explain the reason for this.
 - state what funds have already been raised for the project and list any other funding you have applied for.
 - explain where on-going funding (if required) will be obtained when the Trust's 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.

Applications should be addressed to Brian McGeough and Peter Goddard, the Joint Managing Trustees.

The Trust receives a large number of applications each year and application numbers have increased significantly in the past year. Regrettably, this means we have to decline many good applications.

A list of the grants paid by the Trust in 2009 is available on request and can also be downloaded from our website. Please note, however, that some of these grants were made 2-3 years ago, when different guidelines were in force.

The Trust is normally able to provide a decision within eight weeks of receipt of an application.

In some cases an in-principle decision is made by Trustees pending receipt of references, further information or a visit being arranged.

Applicants who are unsuccessful will be notified in writing and cannot re-apply for at least six months from the date of notification.

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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