

The Wakefield & Tetley Trust

Guidelines for Applicants

July 2011

We are an independent Charitable Trust supporting charitable and voluntary activity in the London boroughs of **Tower Hamlets, Southwark and the City of London Authority**. Trustees are keen to support good quality applications for projects that will improve the lives of people and communities who face disadvantage.

Please read these Guidelines carefully, including the section on what we are unlikely to support, before submitting your application. We also recommend that you visit our website, www.wakefieldtrust.org.uk or ring the office before submitting your proposal, to check for any changes to the funding priorities or deadlines. The Grant Officer can also advise you on the best time to submit an application and give you information on the types of project that the Trust is keen to support.

How applications will be prioritised

There are nearly 3,000 charities and voluntary organisations operating in our area of benefit and the Trust is only likely to support 15-25 projects each year.

The Trust is likely to receive many more proposals than we are able to fund so the following funding priorities have been agreed:

The Trust aims to support projects that will:

Make a positive difference to the lives of people who face significant disadvantage and have limited choices and opportunities, for example because they lack skills, have difficulty in accessing resources or face discrimination. Some examples of people that have been supported in the past include women facing domestic violence, sex workers, victims of race crime, isolated older people and people with moderate to severe learning difficulties.

The Trust will only fund organisations:

- **with an annual turnover of less than £500,000;**
- **that have a relevant track record and experience.**

The Trust will prioritise projects and activities:

- **That are clearly targeted and where there is evidence of the disadvantage faced by their clients;**
- **That will reduce barriers and encourage social inclusion;**
- **That have a clear plan and demonstrate the difference that will be made;**
- **With clear local support and beneficiary involvement;**
- **That complement and enhance statutory provision.**

These priorities will be subject to regular review. We are happy to consider requests to fund core costs, project costs and associated training. These may include revenue costs such as staff salaries

and overheads, however the Trust is unlikely to support equipment or capital costs. The Trust will only award grants for a maximum period of one year and grants of over £10,000 would be exceptional; **the average grant awarded in recent years was £6,500.**

We will not support:

- Grants to individuals
- Work that has already taken place
- Applicants who have been rejected by the Trust within the last six months (unless this was for a Bridging Grant).
- Organisations with significant unrestricted reserves
- Organisations in serious financial deficit
- The promotion of religion
- Animal charities
- Statutory bodies and work that is primarily the responsibility of central or local government
- Health trusts, health authorities and hospices (or any sort of medical equipment or medical research)
- Building restoration or conservation and environmental improvements.

The Trust is unlikely to support:

- Uniformed youth groups
- Schools or projects working with schools, supplementary schools or vocational training

Who can apply

You will need to demonstrate that your organisation:

- Benefits people resident or working in Tower Hamlets and/or Southwark and/or the City of London;
- Undertakes charitable work (however you do not have to be a registered charity);
- Has a constitution or a set of rules which governs its activities;
- Has its own bank or building society account where two or more named people (including one trustee or management committee member) have to sign all the cheques;
- Can provide annual accounts for the previous year (If your organisation is new, copies of your most recent bank or building society statements will suffice).

How to apply

There is no application form. We ask you to send in a brief proposal that covers the points listed below (on no more than 4 sides of A4). We also ask for certain additional documents (also listed below). When we receive your proposal we will send you an acknowledgement, and may ask you for further clarification. The Grant Officer may also arrange a visit to discuss your plans in more detail.

Deadlines for 2011/12

- we will need to receive your initial proposal by **30th August 2011** for a decision in October 2011
- we will need to receive your initial proposal by **9th November 2011** for a decision in December 2011
- we will need to receive your initial proposal by **1st February 2012** for a decision at the end of March 2012.

Points to cover in your proposal

You will need to cover all the points listed below on no more than 4 sides of A4 (with a separate budget). Please use the following headings:

1. Contact details

Provide the name of the lead person working on this proposal, their position in the organisation, a contact address and telephone number, together with and e-mail address if you have one.

2. A description of your organisation

This should include your aims, when and why your organisation was established, your legal status (for example, a voluntary organisation, a registered charity, company limited by guarantee), your current activities and your geographical area of operation.

3. Details of what you are applying for

What are you going to do and where? Over what period? When are you proposing to start? What difference will the work make? Who will benefit?

4. The need for the project

Can you provide any details or evidence of the disadvantage faced by clients and explain why your project/activities are needed; Who have you consulted? Why are you best placed to deliver the project and what is your track record?

5. Our priorities

A. How will your proposal make a positive difference to the lives of people who face significant disadvantage and have limited choices and opportunities? What difference do you expect to see by the end of the project?

B. Tell us how your proposal will reduce barriers and encourage social inclusion

C. How will you proposal complement and enhance statutory provision?

6. Financial costs

Please provide a separate budget for the work. Include an itemised breakdown for each year. Indicate any income you have already secured. How much you are applying for from the Trust? Who else are you applying to?

Additional documents you must send:

- If your organisation is not a registered charity, please provide a copy of your governing document;
- Your most recent signed annual accounts (if they are not available on the Charity Commission website). If you are a newly established organisation you will need to provide copies of your bank or building society statements for the previous three months.
- A list of management committee members, with the names and addresses of the Chair, Secretary and Treasurer.

The Grant Officer will be pleased to advise you about any proposal you wish to submit. Please speak to Elaine Crush on 020 7377 6614.

Our postal address is:

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Our website address is:

www.wakefieldtrust.org.uk