

### About the Trust

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. The Trust has a budget of just over £330,000 for 2009, however a significant proportion of this is already committed.

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](http://www.wakefieldtrust.org.uk) or ring the office before submitting your proposal, to check for any changes to the funding priorities. 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 20-30 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 particularly welcomes applications for:

- A. Cross-cultural and intergenerational projects that help to bring people together, reduce barriers and support community cohesion**
- B. New initiatives that address emerging needs**
- C. New methods of tackling existing problems**

The Trust will prioritise:

- **Projects with local support and beneficiary involvement**
- **Projects that have a well-considered plan and demonstrate the difference that will be made**
- **Organisations with an annual turnover of less than £500,000**
- **Organisations with a relevant track record and experience**

These priorities will be subject to regular review. We are happy to consider requests to fund project costs, relevant core costs and associated training. However the Trust is unlikely to support equipment or capital costs. We usually make grants over one, two or three years, however, funding cannot continue indefinitely as we are keen to support a range of projects and organisations, including those which are new to us. Grants range from £500 to £45,000 over one year but **the average grant awarded in 2008 was £6,000.**

## 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

**The Trust has a 'fast track' procedure for grants under £1,500.** The same funding priorities apply to these grants but there are no deadlines and you will learn of the outcome of your application within one month from the day we receive it. Please contact the office if you are interested in a 'fast track' grant.

For all other grants we have a two-stage application process:

### **Stage One: Outline Proposal**

At Stage One we ask you to send in a brief proposal that covers the points listed below (no more than 3 pages). 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.

You may submit your proposal at any time. Trustees will meet quarterly to look at all of the proposals we have received and draw up a shortlist. All proposals that are not on the shortlist will be rejected.

### **Stage Two: Further Information**

If your proposal is successfully shortlisted, you move on to stage two of the process and may be asked to submit further information to support your request. You may also receive a visit from our Grant Officer. Not all shortlisted proposals will receive funding as the Trust considers more proposals than we are able to support. Trustees will make the final decision about funding for your project.

### **Deadlines for 2009**

- we will need to receive your outline proposal by 26<sup>th</sup> January 2009 for a final decision in March 2009
- we will need to receive your outline proposal by 5<sup>th</sup> May 2009 for a final decision in June 2009
- we will need to receive your outline proposal by 7<sup>th</sup> September 2009 for a final decision in October 2009
- we will need to receive your outline proposal by 9<sup>th</sup> November 2009 for a decision in December 2009

## **Points to cover in your proposal**

You will need to cover all the points listed below on no more than 3 sides of A4 (with a separate budget). Please use the following headings:

### **1. 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. Why are you best placed to deliver the project and do you have any relevant track record?

### **2. 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 and who will benefit?

### **3. The need for the project**

Why is the proposed project needed? Who have you consulted? Are beneficiaries involved?

### **4. Our priorities**

Which of the Trust's funding priorities (A-C) are relevant to your project? Briefly explain how these priorities are addressed.

### **5. 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 an e-mail address if you have one.

### **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;
- Applicants must provide their most recent signed annual accounts. 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.

## Non-priority areas

### **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
- 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)

### **We are unlikely to support:**

- Building restoration or conservation
- Uniformed youth groups
- Schools, supplementary schools or vocational training
- Environmental improvements

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:

**The Grant Officer  
Wakefield & Tetley Trust  
Attlee House  
28 Commercial Street  
London E1 6LR**

Our email address is:

**[elaine.crush@wakefieldtrust.org.uk](mailto:elaine.crush@wakefieldtrust.org.uk)**

Our website address is:

**[www.wakefieldtrust.org.uk](http://www.wakefieldtrust.org.uk)**