

## THE WILL CHARITABLE TRUST GRANTS POLICY

### Categories eligible for grant

1. The Trust provides financial assistance to UK registered or exempt charities whose activities fall within the following three categories, mainly within the United Kingdom:
  - Care of and services for **blind** people, and the prevention and/or cure of blindness;
  - **Long term** care of people with **learning disabilities** either: in a residential care or supported living environment in a way that provides a family environment and wide choice of activities and lifestyle; or, by providing **long term** day/employment activities; and
  - Care of and services for people suffering from **cancer** and their families.

For application deadlines see 'How to Apply'

**Please note that the trustees no longer support the conservation category.** A very large one-off grant to a conservation charity, followed by a much reduced spend in this field in recent years, led to the Trustees' decision in November 2012 to cease supporting this category completely.

### Other categories

2. A small proportion of the Trust's income may be allocated to assistance in other fields, but this is rare and reserved for causes that have come to the attention of individual Trustees. It is therefore only in very exceptional circumstances that the Trustees will respond favourably to requests from organisations whose activities fall outside the categories listed above.

### Research

3. It is unlikely that applications relating to academic research projects will be successful. The Trustees recognise the importance of research, but lack the resources and expertise required to judge its relevance and value.

### General

4. Grants are awarded only to UK registered or exempt charities which must have proven track records of successful work in their field of operation or, in the case of newer charities convincing evidence of ability. Grants will only be awarded in response to direct applications from the charity concerned.
5. The Trust will consider grants to charities of all sizes. Accordingly, grants vary in amount, but generally fall within the range of £5,000 to £20,000. The total amount awarded varies from year to year according to available funds. As a guide, in the year 2011/2012, 47 grants were awarded from our normal programme totalling £525,400.
6. In the current financial climate, commitments to make future payments are rarely given with grants normally being one-off annual grants. Charities which have received a grant are encouraged to apply in the next and subsequent years, but should note that only rarely will

grants be given to the same charity for four successive years. This does not however mean that a charity that has received three successive grants will not be eligible in future years, just that we would not generally award a grant in year four.

#### Exceptional grants

7. The Trustees may occasionally consider larger exceptional grants, but this is unusual and generally confined to charities that we know well and have supported for some time. There is no separate application process for this, and contenders will be identified from the normal grant round. In the year 2011/12, one grant of £50,000 was awarded from this programme.

**THE WILL CHARITABLE TRUST**  
**HOW TO APPLY**

1. Check that you are eligible

Please read our grants policy including the detailed guidance for the relevant field of activity. We welcome applications from those working in these fields, but please apply only if you are satisfied that your charity and the work you are asking us to support are eligible for a grant.

2. Apply in writing

We are sorry but we cannot accept emailed applications. Please apply in writing to:

The Grants Administrator  
The Will Charitable Trust  
Bridge House  
11 Creek Road  
East Molesey  
KT8 9BE

Tel: 020 8941 0450

Email: [admin@willcharitabletrust.org.uk](mailto:admin@willcharitabletrust.org.uk)

There is no application form but please read the guidance attached (see How to Present an Application) and make sure you include all the information we request. Failure to do so may mean we are unable to assess your application properly which will affect your chances of success.

3. Deadlines

*Blind People and Learning Disabilities*

- Applications should be submitted from November and by 31 JANUARY at the latest.
- Decisions are made in the following April and successful applicants will be notified by the end of the month.

*Cancer Care*

- Applications should be submitted from June and by 31 AUGUST at the latest
- Decisions are made in the following November and successful applicants will be notified by the end of the month.

PLEASE NOTE: **Do not** wait until the final deadlines to submit applications – large numbers of applications received at the last minute mean we have less time to give them our fullest consideration which may affect your chances of success.

#### 4. Further queries

If you have read all the guidance, but are still unsure about anything, try our FAQs on our website ([www.willcharitabletrust.org.uk](http://www.willcharitabletrust.org.uk)), and for further help, or to discuss your application, please telephone or email the grants administrator.

#### 5. Acknowledgement

Your application will normally be acknowledged within 3 weeks. Successful applicants will be notified before 30 April or 30 November as applicable (see deadlines above). If you have not heard by those dates, you should assume that your application has been unsuccessful. We are sorry that due to the volume of applications we are unable to notify unsuccessful applicants individually.

#### 6. Reporting requirements

We ask charities to whom we have awarded grants to submit a short update on their project by the application deadline the following year, ie:

- 31 January in fields *of care of blind people and care of people with learning disabilities*, and
- 31 August for *cancer care*.

No further updates are required unless specifically requested.

Please note that although the requirement to update us is not a formal grant condition, failure to do so will be taken into account when we consider future applications.

## GRANT APPLICATION GUIDELINES HOW TO PRESENT AN APPLICATION

We are not necessarily looking for glossy professional bids and understand that your application to us will vary according to the size of organisation you are, and the size of the proposed project. It can be a professionally prepared presentation pack, but can equally be a short letter with supporting information. Both will receive equal consideration.

Whatever the presentation, the following lists the areas that must be covered. Failure to do so will affect your chances of success.

- 1) **Organisation overview.** This paragraph/section must include a short background to the charity and a summary of activities. Please include relevant information on your clients/beneficiaries (this might include numbers helped, geographic location, age group etc) and numbers of employees and volunteers. Please give us this information every time you apply.
- 2) **Project description.** Tell us what you want a grant for/towards. Explain why it is necessary, what you hope to achieve, who will benefit and how.
- 3) **Costs.** Tell us the total cost of your project and give us a breakdown including at least the main items of expenditure. Tell us how you intend to fund it, and how much you have raised so far. If the project is part of a larger one, please explain the wider context.
- 4) **Contingency plan.** Explain what you intend to do if you fail to raise all the funds you need.
- 5) **Timetable.** Tell us your timescale for raising funds and when you aim to have the project up and running.
- 6) **Annual accounts.** Your latest audited accounts and Annual Review (if you have one) must be included.
- 7) **Other information.** Please include any other information which you feel will assist us in judging your application. This could include for example a copy of your Newsletter, or short promotional/advertising leaflets. Such publications often help give a flavour of an organisation.

If you wish to discuss your application, or have other queries, please contact the Grants Administrator, Christine Dix, either by email [admin@willcharitabletrust.org.uk](mailto:admin@willcharitabletrust.org.uk), or by telephone on 020 8941 0450. Please note if you telephone that the office is open part-time and you may need to leave a message.

## GRANT APPLICATION GUIDELINES LEARNING DISABILITIES

The Trust awards grants to UK registered or exempt charities whose work fulfils the criterion:

*Long term care of people with learning disabilities either: in a residential care or supported living environment in a way that provides a family environment and a wide choice of activities and lifestyle; or by providing long term day/employment activities.*

The Trust welcomes applications but receives far more than it can afford to support. In a typical year we are able to respond positively to around 1 in 6 applications. Around 12 charities are supported each year with grants varying from £5,000 to around £20,000. Charities which exist primarily to provide residential care are looked at most favourably, but the Trustees are happy to consider charities which provide other services for people with a learning disability, *provided that* those services are long term for the individuals concerned. The Trust does not support charities that provide shorter-term services such as schools, colleges, or training organisations, and neither do they support those that work in the field of mental illness.

The Trustees are unlikely to respond positively to requests for running costs of organisations unless there are exceptional reasons, preferring instead to support new or capital projects. The Trust supports charities of all sizes. Examples of recent successful applications are below.

A donation of £20,000 was made to a £1.0m capital appeal to build an additional care home for ageing residents with increasingly complex care needs.

A large national charity which provides lifelong residential care and day services, was awarded £15,000 towards the £1.94m cost of reconfiguring and extending one of its day care buildings.

A charity was awarded £12,000 to develop a volunteering programme to supplement its care package for residents by providing volunteer-led day activities.

A local charity which provides long term day care and employment for individuals until retirement, was awarded £10,000 to help fund the equipping and refurbishment of new premises.

A grant of £10,500 was given to fund the replacement of windows at a residential care home.

A charity was awarded £8,500 to fund the introduction of music therapy in one of its care homes for residents and day service users.

A donation of £20,000 was given to a charity towards a £2.0m capital appeal to build an extra residential care home on its village site.

If you wish to discuss a particular project before submitting an application, please email or telephone the Grants Administrator (contact details on page 3).

**Applications should be submitted from November and by 31<sup>st</sup> January at the latest**

Please try and get your application to us before the final deadline, as large numbers received on 31 January may mean that these applications do not get our fullest attention.