

## 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 four 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.
  - Care of and services for people suffering from **cancer**, and their families; and
  - **Conservation** of the countryside in Britain, including its flora and fauna.

For application deadlines see 'How to Apply'

### 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 2008/09, 44 grants were awarded from our normal programme totalling £491,000. No grants were awarded in this year from the exceptional grants programme.
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.

## 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  
Sunbury International Business Centre  
Brooklands Close  
Sunbury on Thames  
TW16 7DX

Tel: 01932 724148

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 ask for. 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 and Conservation*

- 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, telephone (01932 724148) or email the grants administrator on the following address: [admin@willcharitabletrust.org.uk](mailto:admin@willcharitabletrust.org.uk)

## 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 and conservation* grants.

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 01932 724148. 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 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 grant of £10,000 was awarded towards the £50,000 cost of installing specialist computer equipment into 6 residential care homes and of providing training to residents.

A charity that runs residential care homes and supported living schemes was given £13,000 towards the £26,000 cost of setting up a horticulture project/social enterprise at one of their day centres.

Large national charity was awarded £15,000 towards a £1.34m capital appeal to build another residential care home.

Charity was given £15,000 towards the recruitment and salary cost of a new specialist in the care of adults with learning disabilities who develop dementia.

Charity that provides long term permanent employment to adults with learning disabilities was given £7,500 towards the purchase cost of tools, computer equipment and kitchen refurbishment.

Charity that runs residential care homes was given £15,000 towards the £300,000 cost of refurbishing their day care centre.

Charity that provides residential care and runs supported living schemes was given £20,000 towards the £650,000 cost of relocating their day care centre.

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.