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## Guidelines for applying for a grant

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**Please note: these guidelines are designed to assist charities requesting funding from the Swire Charitable Trust's core funding programmes only. They are not applicable to those who wish to apply to the Trust's discretionary fund or the Swire family trusts.**

### Who we are

The Swire Charitable Trust is an independent UK grant making charity. Since 1975 the Trust has supported a wide range of charities that share its commitment to delivering positive and lasting change to UK society. The Trust receives its funding from John Swire & Sons Ltd, the parent company of the Swire Group.

### Who and what we fund

The Swire Charitable Trust awards grants via three funding programmes to UK registered charities working in England, Scotland, Wales and Northern Ireland. These grant-making programmes are currently open and welcoming eligible online funding requests.

- **Welfare**
- **Opportunity**
- **Heritage**

Sadly, demand for our grants far exceeds supply and we currently have to turn down over 85% of the applications we receive, including many that are closely aligned with our funding priorities.

### Our funding programmes

In early 2017, we launched the Trust's three grant-making programmes. Key aims underpin these, which are outlined here.

Applicants should be aware that only in very rare cases will we fund activities that deviate from these stated funding priorities.

### 1. Welfare

#### Improving life chances

We give grants to charities that can facilitate long-term positive change in the lives of vulnerable & disadvantaged people. Specifically, we fund charities working with:

- Care- experienced children and young people
- Ex-servicemen and women
- Victims of modern slavery and human trafficking
- Young offenders

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### 2. Opportunity

#### Nurturing potential

We fund organisations (working outside mainstream education) who help children and young people from marginalised or challenged backgrounds to fulfil their potential. In particular, we fund activities that can show to:

- Narrow the attainment gap for children from disadvantaged backgrounds
- Reengage children and young people with education, training, employment or volunteering

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### 3. Heritage

#### Regeneration through restoration

We fund projects that not only have legitimacy from a heritage perspective, but also have the potential to deliver substantial social and economic benefits to deprived communities or disadvantaged people.

We also make grants to charities that whose activities help to keep traditional and at-risk skills alive.

## Who do we support?

We will prioritise charities that:

- Operate in some of the most economically disadvantaged parts of the UK and work with those from the most challenged backgrounds
- Can clearly demonstrate the needs they are addressing
- Know what they are aiming to achieve and plan to monitor and evaluate outcomes
- Are well placed and qualified to deliver the work
- Can show a proven track record as well as solid ambitions
- Have the potential to change the way issues are tackled more widely
- Take an effective approach to using volunteers and mentors (where appropriate)
- Are seeking to make their income streams more sustainable
- Have strong and quality leadership
- Manage their finances prudently

## What can't we fund

- Applications received by post or email, i.e. not via our online funding request form
- Organisations that are not UK registered charities
- Requests from charities that have applied to us in the last 12 months
- Individual applicants or proposals that will benefit only one person
- Activities taking place outside England, Scotland, Wales or Northern Ireland
- Work that has already taken place
- Statutory bodies or work that is primarily the responsibility of statutory authorities (e.g. residential, respite and day care, housing and the provision of mainstream education in schools, nurseries and colleges)
- Activities of local organisations which are part of a wider network doing similar work (e.g. uniformed youth groups, YMCA, MIND, Mencap, Home-start, RDA, Wildlife Trusts, Relate, Citizens Advice Bureau, Age UK etc)
- Medical-related activities – such as those offering treatment, care, advice, research or equipment
- Animal welfare charities
- Academic research, scholarships or bursaries

## Types of funding

### Types of funding

Grants from our core programme will aim to meet the needs identified in your application. We will fund individual projects that are aligned with our funding priorities but we also recognise that charities themselves are often best placed to allocate resources within their organisations. Therefore our grants are sometimes awarded on an unrestricted basis and we are willing to support core costs, capital expenditure and salaries.

There is no maximum or minimum grant size and, although we base our grants on the amount requested and the size of organisation, we may award more or less than you applied for.

While most of our grants are for one year only, we appreciate that charities welcome security of funding. So, where a longer-term commitment can be clearly justified, we are willing to consider multi-year grants of up to three years.

Our small team processes a large number of requests and grants each year. With such limited resources, we are unable to consider more complex funding arrangements, like loans, or offer other types of support such as advice, feedback or networking opportunities.

### Standard conditions of funding

We aim to provide funding with as few strings attached as possible, but our grants usually come with a set of simple conditions. Any additional requirements will appear in the grant letter. We generally make our payments by cheque, usually soon after a grant is awarded.

For grants of £25,000 or more and for all multi-year grants, we now ask grantees for a simple progress report, either at the end of the grant period or, for multi-year grants, one month before the next payment tranche is due.

If we are funding a specific project and it is subsequently found to be non-viable, grantees will need to seek our approval before reallocating our grant to another purpose.

We are happy to be named in charity donor lists, such as in annual reviews, but we ask grantees to get in touch if they wish to highlight the Trust in any other way.

## How to apply for funding

We have tried to make our funding application process as simple and transparent as possible. To apply, please complete our online funding request form, outlining succinctly why your work is needed and effective.

There is one stage to our application process, with a single online form for all three programmes and types of grant. There are no deadlines or closing dates – we welcome applications all year around. Requests are allocated to the next appropriate meeting, depending on the size of the request.

We can no longer accept applications by post or email and any charities applying via these channels will be asked to reapply through our website.

We encourage applicants to read these guidelines, review the application form questions and consult our FAQs before they embark on an application.

## Applying for funding

Funding requests can be submitted via our website by completing the following steps:

### Step 1: Pass an eligibility test

Please answer all the questions and submit your responses. If your answers indicate that you are eligible to apply for funding, you will move automatically to the next step. If they don't, unfortunately you won't be able to proceed.

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### Step 2: Complete the online funding request form

Please complete every field and try to demonstrate why your charity's work is needed and effective. Most of the questions have character limits but please don't think that you need to use these up. Concise answers are often the most compelling. A PDF of the questions on our funding request form can be found on our website. This is for guidance only and funding applications must be submitted via the online funding request form.

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### Step 3: Add attachments and submit your request

At the end of the form, we ask applicants to upload a copy of their charity's latest inspected or audited accounts. If your charity is too new to have these, a copy of a bank statement will be fine. You may also upload budgets and also any other materials that will add weight to your request.

You can make changes and save your form at any time before submission. To do this please click on 'Save and Resume Later'. You will then have 30 days to complete your application. After this period, the link will expire, and unfortunately it will not be possible for you to access your draft submission. We any information you may have inputted.

Once you have completed all of the fields on the form, and uploaded any attachments, please click 'Submit Application'. It is only at this point that our assessors can access the information you have inputted.

Our application guidelines and FAQs are there to help you complete your application. But if you need any extra help, please email [info@scts.org.uk](mailto:info@scts.org.uk).

## What happens after we receive your funding request?

### Acknowledgement

On receipt of a completed request the applicant is sent two emails: one acknowledging receipt; and a second attaching a copy of your submission. After that, you may not hear from us again until the outcome of your application has been determined.

### Assessment

After an initial assessment by our grants team, eligible requests aligned with the Trust's current funding priorities are passed to trustees.

Request for up to £25,000 are considered at Monthly Grants Committee Meetings, with larger requests reviewed at Quarterly Trustees Meetings (usually held in January, April, July and October). The application window normally closing two to three weeks before each meeting.

Decisions are usually made within one to four months, but occasionally it can take slightly longer.

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### Outcome

We will notify you by email if your funding request has not been successful. Regretfully, due to the small size of our team, we are unable to offer specific feedback to unsuccessful applicants.

Successful applicants will receive an email informing them of our Trustee's grant decision. We will then send a letter and grant cheque, along with our standard terms and conditions, which grantees are deemed to accept when they present the cheque for payment. We aim to send this within a fortnight of awarding a grant.

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### Reapplying for a grant

Whether or not a funding request has been successful, we ask applicants to wait at least one year from the date of application before reapplying for a grant.

## Contact

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