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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 do not apply to the Trust's discretionary fund or any of 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.

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

## 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. Eligible funding requests are welcomed via our online application form.

### 1. Opportunity Programme

#### Improving life chances, realising potential

We support charities that are directly addressing the challenges faced by the most marginalised and disadvantaged, supporting them to make the most of their talents and boost long-term outcomes.

We specifically focus on organisations working with:

- Ex-service men and women
  - Victims of slavery and trafficking
  - Children and young people:
    - In the care of their local authority
    - Involved with the criminal justice system
    - From the most economically disadvantaged backgrounds
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### 2. Environment Programme

#### Involve - Connecting people to the environment

We fund charities that inspire and motivate individuals and communities to enhance our natural and built environment and help guide those who wish to live more sustainably.

#### Protect and regenerate - Supporting the UK's biodiversity

We fund activities that actively improve the health and resilience of the UK's eco-systems, habitats and native species.

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### 3. Heritage Programme

#### Regeneration through restoration

We are keen to fund projects that have legitimacy from a heritage perspective as well as the potential to deliver meaningful social and economic benefits to deprived communities or disadvantaged people.

We favour grass-roots organisations that strongly engage with their local communities.

#### Safeguarding endangered skills

We also fund charities that are working hard to protect and cultivate the skills and knowledge underpinning the UK's heritage sector.

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

## Overarching themes

We prioritise charities that:

- Operate in some of the most economically disadvantaged parts of the UK and work with people 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

## Our Exclusions

We cannot fund:

- Applications received by post or email, i.e. not submitted via our online funding request form
- Organisations that are not UK registered charities
- Activities taking place outside England, Scotland, Wales or Northern Ireland
- Individual applicants or proposals that will benefit only one person
- Requests from charities that have applied to us in the last 12 months
- 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)
- 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, Relate, Citizens Advice Bureau, Age UK etc)
- Medical-related activities – such as those offering treatment, care, advice, research or equipment
- Scholarships or bursaries

## Our funding

### Types of funding

Grants from our core programmes will aim to meet the needs identified in your application. We fund individual projects that are aligned with our funding priorities, though we also recognise that charities are often best placed to allocate resources within their organisations. We therefore award many grants on an unrestricted basis and 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 will 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.

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### 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 be detailed in our grant award email.

For grants of £25,000 or more and for multi-year grants, we 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 that 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 you to get in touch if you wish to highlight the Trust in any other way.

## How to apply for funding

We have tried to make our application process as simple and transparent as possible. There is just one stage, with a single online application form for all three programmes and all types of grant.

Please remember that we can no longer accept applications by post or email. If you apply via these channels, we will ask you to reapply through our website.

We encourage all 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 the online funding request form, a link to which can be found on the *Apply for Funding* page of our website. The following steps need to be completed:

### 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 be taken on to our online application form. 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 all 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.

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 grants team can see 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 assigned to the next appropriate meeting.

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 closes two to three weeks before each meeting. If your application has been shortlisted, it is likely that we will ask to speak or meet with you before taking your request to our Trustees.

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. Regrettably, 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 Trustees' decision. Applicants will be asked to send us their bank account details by completing our online Bank Detail Form, uploading a copy of a recent bank statement (or paying in slip), as well as confirming that they have accepted our standard Terms and Conditions. Our aim is to send payments within two weeks of receipt of bank details.

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### Grant Monitoring

We ask recipients of large and multiyear grants to keep us informed and they are asked to comply with our monitoring requirements.

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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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