

SWIRE TRUSTS

Guidelines for applying for a grant – Swire Family Trusts

These guidelines are designed to assist charities requesting funding from one of the following Swire Family Trusts:

- Adrian Swire Charitable Trust
- John Swire 1989 Charitable Trust
- The SCS Trust
- Swire 2765

Please read them carefully before you begin your application. They are intended to help you when completing your application, in addition to any guidance provided by your contact at the Swire Trusts.

This guide does not apply to the Swire Charitable Trust. For information on how to apply to the Swire Charitable Trust, please visit <https://www.swirecharitabletrust.org.uk/>

Applications to one of the Swire Family Trusts are by invitation only. You should have already been in touch with a member of the Swire Trusts Team to discuss your organisation and received a link to the application form if you have been invited to apply. Please note that an invitation to apply is not a guarantee of funding being awarded.

General Guidance/Before you start

We have tried to make our application form as simple as possible. Here are some general tips to help you:

- Please complete all sections of the form, noting the character counts. All character counts include spaces.
- Write in plain English and avoid jargon where possible.
- Please keep your answers as succinct as possible.
- Spell out all acronyms and initials.
- Ensure that all key information is contained in the main application form, rather than supporting documents.
- Ask someone unfamiliar with the charity/project to read it and feedback their understanding to you.
- Please evidence any statements of need and demand.
- Provide references/sources for any statistics provided in your application.
- If you are applying for unrestricted funding, ensure your application covers all of your organisation's services and beneficiaries, not just a particular service or cohort.
- If you are applying for a project, be clear about how the project works in practice, the scope/scale and evidence of what makes or is likely to make the project/work successful.

Save and Resume

You can make changes and save your form at any time before submission. To save, please click on 'Save and Resume Later' and either choose the option to email yourself the link or cut and paste it somewhere safe. You will have 30 days to complete your application, after this period, the link will expire your work will be lost.

We cannot access draft applications, so please make sure you have the link saved before you close the page. We advise that you draft your answers in Word before placing them in the online form, to prevent any data loss.

Guidance for application questions

Contact information

If there are any changes to contact details after you have submitted your application, please contact us at info@scts.org.uk as soon as possible to let us know.

Please make sure your email address is correct as confirmation of your application will go directly to this address and we are unable to reissue correspondence that comes from the form confirmation.

Charity information

Brief summary of your organisation

Please give a short snapshot of your charity, to introduce us to your organisation. This should include an overview of the aim of your charity, who you are trying to help/issue you are addressing, and how/where you do your work.

Financial information

Please give details for your **latest published** accounts on the Charity Commission. If your organisation is below the threshold for publication, please use the latest completed accounts.

Funding request

Title of your funding request

Please complete this if you are applying for a project only.

Short summary of your funding request

This overview should summarise the main points of your request. If you are applying for unrestricted funding, you can use this section to highlight key developments you aim to achieve during the grant period and what you are likely to use the funding for.

If you are applying for a project, please use this section to succinctly give an overview of your project and your request.

Please select the type of funding sought

Unrestricted grants can be used for any charitable purpose required by the organisation. For unrestricted grants, we assess the organisation as a whole and award grants to those whose work is most closely aligned with our funding priorities.

Restricted grants can be awarded toward a specific project, role, or area of work. For restricted grants, we assess the project/area of work/role within the wider context of the organisation's aims and other services, against our funding priorities.

Amount requested

If you have not received a grant from any of the Swire Trusts in the past, you are eligible to apply for one year of funding only. If you have been a previous grantee, you are eligible to apply for up to 3 years of funding in this application. Please note that past success is no guarantee of future funding.

We tend not to award grants of more than 10% of a charity's income in total. For more guidance on the levels of funding we award please see our published annual report on the Charity Commission.

Total project budget

Please ensure that the figures given are correct. We will also ask for an Excel spreadsheet of the budget breakdown to be uploaded with your application. You should include all expenditure budgeted for the whole project, not just that covered by the grant request. It is also helpful to know how much has been raised towards the budget so far.

Please give an overview of the needs/issues that will be addressed by the work you are seeking funding for

Clearly outline the issue you are aiming to address, together with supporting evidence, ensuring that you include comparative information that puts statistics in context, e.g. "only 0.04% of Northern Ireland is ancient woodland, as opposed to 2.5% across the UK". If you are working in a particular geographic area, please provide specific supporting evidence where possible, not just national statistics.

Please explain how your charity plans to address these needs/issues

Be clear about the scale and scope of the service/project. It is also important to specifically include what will be delivered and how it will be carried out, such as frequency, depth and breadth of support. Include any referral pathways, transport links, charges and support for barriers to access.

If applicable, please detail how many direct beneficiaries will be supported by the charity/project

For all applications involving community or disadvantaged beneficiaries, this field must be completed. For unrestricted funding, please include all direct beneficiaries supported by the

charity. If you are applying for a project, please detail all direct beneficiaries supported by the whole project, not only those supported by the grant.

Please detail how this figure has been calculated

If applicable, please also add how many beneficiaries will be supported by the grant and any secondary (indirect) beneficiaries.

Please highlight up to 3 key outcomes that you aim to achieve and how you plan to monitor and evaluate these

For larger and multi-year awards, we will ask you to report on these annually, therefore outcomes should be measurable where possible. Please outline how these will be monitored, both qualitatively and quantitatively.

Please explain why your organisation is well placed & qualified to deliver this work?

Include any evidence of the past impact of your work, or any pilot projects that support your project/service. Please also include any training or qualifications of staff needed to run the project/service, local networks, links or unique reasons why your organisation is best placed to provide the project/service.

Please give details of your fundraising to date for this work

Please include any secured funding, prospective applications and any alternatives should these applications not be successful. For capital works, land purchase and other large projects, please let us to know which other funders or donors will be involved and if you are considering naming rights.

Is there anything else you would like to share with us at this stage?

This can include a summary of your most recent financial situation, or any reasons for unusual surpluses/deficits/reserves levels.

You can also use this section to detail any key developments of the charity not included in the above questions.

Attachments

You must attach the following documents:

- Latest published audited/independently examined accounts
- A project or organisational budget (preferably in Excel)

You may also attach up to 3 additional documents to support your application. If applying for a salary cost, please attach a job description for the role. If applying for a capital project, please attach any relevant plans or designs.

Please ensure that any key information is included in the main body of your application. You should not rely on important information in supporting documents being considered.

Acknowledgement

On receipt of a completed request, you will receive an email acknowledgement, with a copy of the application attached. After that, you may not hear from us again until you receive a decision.

All correspondence is sent to the email address on the application form, so please double check that you have inputted this correctly and let us know straight away if you need to make any changes by emailing info@scts.org.uk.

Assessment

We run a rolling programme with regular grantmaking meetings throughout the year, so there are no deadlines. Once you have submitted your application it will be assigned to the next available meeting.

We sometimes request a short, informal video call with charities as part of the assessment process. There is no need to prepare a presentation for these meetings. We ask that a maximum of two people attend from the charity, in the interests of time.

Outcome

We will notify you by email with the outcome of your application. Sometimes this email is diverted to spam. If you are expecting an outcome, please check your spam filter before contacting us.

Successful applications

If your charity is awarded a grant, you will be sent our online Grant Acceptance form to complete, which will also request payment details.

To accept the grant, please ask a senior leadership member of staff to accept our standard terms and conditions on behalf of your organisation.

We will ask you to complete your charity's bank account information. You will need to upload a copy of a recent bank statement or paying in slip (not more than 6 months old) as proof of account for audit purposes.

Grant Monitoring

Your grant offer email will advise you of any reporting requirements. We ask recipients of larger and multi-year grants to report on the progress of the organisation/project on an annual basis, through our online monitoring form. A unique link to the form will be sent by email around 6-8 weeks before the next grant payment or 13 months after the final grant payment.

If there are any significant changes to the project or you wish to vary the purpose/timeframe of your grant, please let us know as soon as possible by emailing us at info@scts.org.uk

It is particularly important to let us know if the main contact for a grant changes as soon as possible, to avoid delays in grant payment or communication.

Reapplying for a grant

If your application has not been successful, please wait at least one year from the date of application before reapplying.

If the charity has received multiple rejections from us in the past it is likely that it is not a good fit for our programmes and we would not encourage further applications.

If you are a previous grant holder considering applying for a level of funding that is significantly higher than a previous grant, please email your usual contact to discuss this first.

Common reasons why applications are unsuccessful

We aim to fund as many different organisations as possible. This means that, as we always receive more applications than we can fund, sometimes even strong applications are not successful.

Reasons why applications are unsuccessful include:

- We received a high number of applications and other organisations presented an even stronger case for support, or were more in need of additional funding.
- The scale and scope of the work was not clearly explained or quantified.
- Outcomes and evaluation measures needed to be more clearly articulated.
- More information was needed about the referral pathways, both for beneficiaries and volunteers.
- Demand for the service was not demonstrated sufficiently.
- The amount requested, or overall project cost, was disproportionate to the scale of the intervention, or its anticipated long-term impact.
- Important additional information was not attached with the application, such as budget information, most recent accounts, plans and designs for capital projects.
- Facts and statistics cited were confusing, did not relate to the work proposed, or were presented without context or comparative data.
- The activities involved in the work were not clearly explained, or the work itself was not defined.
- The organisation holds a high level of free reserves (above its reserves policy) without supplying a satisfactory explanation.
- Occasionally an issue arises through the due diligence process.
- The application was sent by email or as a hard copy.
- The application did not meet the eligibility criteria.