

The voice of the Voluntary Arts

Applying to Trust Funds

Charitable trusts in Britain give away something like 500 million a year. Grant-making trusts and foundations provide funding for charitable purposes from returns on investments made by trustees. Trusts need to convince the Inland Revenue that they use their income only for charitable purposes and so may only be able to help if your group is already a charity. The amount they give per grant varies so you need to match your application to the trust carefully.

The first thing to remember is that all trusts are different, it is not enough to write off a standard letter. Eight out of ten applications for funds from trusts fail because they are outside the guidelines so before you apply you need a copy of the trusts published guidelines for applicants. There are several trust directories which can provide you with addresses to write to for information, for example Guide to the Major Trusts, Volumes 1 and 2, published by the Directory of Social Change. You could also get hold of the trusts annual report and find out who they have previously funded. Remember all trusts have their own prejudices and pets so find out as much as you can about their habits before you apply. If you can, phone their office and ask if they respond to initial enquiry letters or would be prepared to discuss your proposal on the phone. If they agree then write down your ideas and put them in the post, the trust will often give you a view of whether you are likely to succeed and some pointers to improve your application.

How do I choose who to apply to?

If your request for funds meets the criteria of more than one trust then by all means apply in batches, but remember it is much better to compose five well targeted letters than to send a mailshot to 20 trusts which looks like a blanket application. If you are lucky enough to be offered funds by two trusts for the same project then you need to tell one of them what has happened. When you contact them you can ask to use the money for something else instead, they may agree and will certainly appreciate your frankness.

When do I apply?

Many trusts meet only once or twice a year and you need to get applications in well in advance of these meetings, most have set deadlines for applicants. If you have applied to a trust which meets regularly you may still have to wait six months for a reply, however, others let applicants know within a week or two. If a phone number is not given on the Trusts headed paper or application material then phone calls are probably not welcome. Many trusts do not have an office but are run by solicitors, accountants or the trustees themselves and are likely to react badly to applicants who contact them too often.

What are the basic things the trustees need to know?

The trustees will want to know how much money you want and what you want it for – but they also need some background information to work with. Your applications must include the full name of the organisation, its address and phone number and the details of someone who will be their contact point – this needs to be someone easy to get hold of, who knows about the project and is kept fully up to date on developments.

Tell the trust how the organisation works. Do you have paid staff, when do you hold meetings, do you have a constitution, what sort of funds do you manage? Include a copy of your accounts for the trustees to look over as well as a brief history of the group.

How do I impress the trust with my proposal?

The trustees will want to see:

- That you have a good idea, that yours is the sort of proposal they want to fund and you have something which is different from the other applications they have received that week. Read between the lines in their guidelines and see what they are implicitly looking for. For instance, The Carnegie UK Trust requests: Proposals which are innovative and developmental and have the potential to influence policy and practice more widely; and are undertaken in partnership with others. Trustees are aware that a poor application can hide a good idea but the better the presentation the better the chance of success.



- That your organisation is well managed. You need to show a solid record of achievements in the past and describe the ways in which you intend to manage your project. You also need to build into your proposal some regular feedback and to check on your own progress. It is a good idea to incorporate milestones into your planning, for example to get the research for the project done by the end of the first month. Most trusts would expect your project to have some kind of evaluation.
- That they are getting value for money. The Drama Association of Wales applied to Carnegie to fund a summer school for 29 students. They argued that the school was open to groups from all over the UK which made it more attractive to the trust. They also submitted an application which said that the students who attended would go back to their groups and each train 25 more people so that the subsidy instead of being 200 for each of 29 students was in fact 3 per head to train more than 700 students. This bit of creative thinking meant the trust saw the summer school as a far better investment.
- That others are investing in you or will do if you get the money. If you have had cash from other trusts or public bodies in the past then include this in your application, it makes you look like a sound investment! If getting money from the trust will mean you can lever funds from your arts council or local authority then make this plain too. Trusts are as happy to top up an organisations fund and to fund as a whole project themselves. Some trusts will provide partnership funding for lottery applications so check this out before applying.
- That you will disseminate the knowledge and information you gain. The more people you can help through your project, the happier the trust will be to fund it. If you can pass on knowledge through your publications, skills sharing, training or a conference then the project will have helped not only those directly involved but the wider voluntary arts sector.

Be clear and precise, do not use jargon. The most important thing to remember is **be enthusiastic**. Presentation can help but the idea is paramount.

Funders want to see common sense wrapped in love and if the people behind an application can show they are committed, innovative and sparky then their passionate approach will be an important, sometimes pivotal factor.

What about once you have got the money?

It may seem obvious but write and thank the trust when you receive the grant and keep in touch. Send the trustees press cuttings, annual reports and regular information about the projects they have funded. They will remember you much better next time you ask for help!

Further information & resources

Thanks to John Naylor of Carnegie UK Trust for the above information.

- Scottish Arts Council's factsheet '*Funding sources for the Arts in Scotland*' can be downloaded from their website at: www.scottisharts.org.uk/1/information/publications/1000663.aspx
- DSC Trust Fund guide website: www.trustfunding.org.uk
- '*The Arts Funding Guide*' published by the Directory of Social Change, ISBN 1 903991 10 2. 6th Edition 2002, £18.95
- '*Directory of Grant Making Trusts 2005-06*' New Edition, published by DSC in association with Charities Aid Foundation, ISBN 1 903991 58 7, £85
- '*A Guide to the Major Trusts Vols 1 and 2*' New Editions, published by DSC, ISBN 1 903991 55 2 & 1 903991 56 0, £29.95 each
- '*Finding Funds*' published by the National Council for Voluntary Organisations (T: 0171 713 6161) provides broad guidelines for fundraisers.
- '*Funding for Voluntary Action 2002*' published by the Community Foundation for Northern Ireland gives details of local trusts in Northern Ireland. E: info@communityfoundationni.org or visit www.communityfoundationni.org
- CREATE (formerly CAFÉ) publications/Clann Credo '*Irish Fundraising Handbook*' 5th edition 2003-04, visit their website at: www.communityartsireland.com/

Disclaimer: We have taken reasonable precautions to ensure that the information contained in this Briefing is accurate. However, the document is not intended to be legally comprehensive. We recommend you take legal advice before taking action on any of the matters covered herein.

Do you need this publication in a larger or alternative format? Contact Whitney T: 029 20 395 395 E: whitney@voluntaryarts.org



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