

2014/15

THE GUIDE TO

MAJOR TRUSTS VOLUME 1

FOURTEENTH EDITION

Tom Traynor, Jude Doherty,
Lucy Lernelius-Tonks,
Denise Lillya & Emma Weston

DSC

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DIRECTORY OF SOCIAL CHANGE

Published by the Directory of Social Change (Registered Charity
no. 800517 in England and Wales)
Head office: 24 Stephenson Way, London NW1 2DP
Northern office: Suite 103, 1 Old Hall Street, Liverpool L3 9HG
Tel: 08450 77 77 07

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authors or publisher.

First published 1986
Second edition 1989
Third edition 1991
Fourth edition 1993
Fifth edition 1995
Sixth edition 1997
Seventh edition 1999
Eighth edition 2001
Ninth edition 2003
Tenth edition 2005
Eleventh edition 2007
Twelfth edition 2010
Thirteenth edition 2012
Fourteenth edition 2014

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1995, 1997, 1999, 2001, 2003, 2005, 2007, 2010, 2012, 2014

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ISBN 978 1 906294 85 4

British Library Cataloguing in Publication Data

A catalogue record for this book is available from the British
Library

Cover and text design by Kate Bass
Typeset by Marlinzo Services, Frome
Printed and bound by Page Bros, Norwich



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Foreword

If there is anything akin to a Fundraiser's Bible then *The Guide to Major Trusts* is it, so I was delighted to be asked to write a foreword for the 2014/15 editions. I find it incredible that it is almost 30 years since the first edition was published in 1986. It is testament to these guides' enduring worth that they are still appearing in print version in this digital age.

Despite the economic downturn in recent years, the trust market is worth an estimated £2.8 billion per year and is a fundamental source of funding for charities both large and small. These DSC guides provide clear, concise summaries of each trust's policies and preferences, detailed information on how to apply and, in many ways most importantly, what a trust *won't* fund. They are essential resources for an organisation that is looking to develop its trust fundraising from scratch and one or both guides have a place on the desk of every trust fundraiser. They

represent exceptional value for money in terms of the amount of funding on offer within it!

Research is the basis of good fundraising. Without insight into our donors and prospects we cannot forget those mutually beneficial donor journeys that deliver such an impact across our communities. Once we have some understanding of our donor motivations we can cultivate strong long-term partnerships and move away from a transactional approach that is less satisfying for both parties. These DSC guides help to broker these relationships and provide a key link between funder and grantee.

I hope those new to fundraising and more experienced practitioners alike benefit from and enjoy these new editions.

Lynda Thomas
Director of Fundraising, Macmillan Cancer Support

About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. The activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to help these organisations and the people who support them to achieve their goals.

We do this by:

- ▶ providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics;
- ▶ acting as a 'concerned citizen' in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups;
- ▶ leading campaigns and stimulating debate on key policy issues that affect those groups;
- ▶ carrying out research and providing information to influence policymakers.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. We have a range of subscription-based websites containing a wealth of information on funding from trusts,

companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client's location. DSC conferences, many of which run on an annual basis, include the Charity Management Conference, the Charity Accountants' Conference and the Charity Law Conference. DSC's major annual event is Charityfair, which provides low-cost training on a wide variety of subjects.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 08450 777707 or email publications@dsc.org.uk.

Introduction

Welcome to the fourteenth edition of *The Guide to Major Trusts Volume 1*. The purpose of this book has always been to get inside the policies and practices of the largest trusts and foundations in the country, and to explain what they are doing with their money, open them up to public scrutiny, encourage transparency and provide information for charities that are seeking funding for their valuable work. In doing this, the book has had considerable success. As well as being a practical and useful resource for those seeking grants, it has also been an independent review of the work of the larger trusts and foundations. As such, it has enabled readers to compare and contrast grant-makers and how they operate.

In recent editions we have reported on the difficult economic conditions faced by grant-making trusts and foundations, the wider voluntary and community sector and society as a whole over the past six or seven years. In the twelfth edition in 2010, this book used data and financial information from the height of the worst recession for generations, and the situation looked bleak. Many trusts and foundations were hit hard, and collectively the value of the assets fell by around £4 billion on pre-recession levels. The thirteenth edition, published in 2012 using financial information from a time when the economy was slowly emerging from the recession, showed a picture of recovery, as asset value increased by £3.7 billion to around £36.5 billion.

Research for this, the fourteenth, edition shows that the value of the assets for the trusts and foundations described here totalled over £38.3 billion. This is an increase of more than £1.8 billion in comparison to the last edition. Correspondingly, income has increased by £181 million since the previous edition. Excluding the Big Lottery Fund, total grants have also increased by almost £102.3 million. If we include the substantial increase in funding from the Big Lottery Fund, the total grants of the 400 organisations featured in this book increased by £507 million.¹

However, this overall trend towards a recovery of the finances of these larger trusts and foundations needs to be viewed in the wider context of severe cuts or 'efficiency savings' in practically every area of public expenditure, from welfare and the NHS to education and the environment, with the poorest and most

disadvantaged in society being hit hardest. It is also reported that at the start of 2014, just 40% of the government's cuts in funding for public services have been implemented so far, with a further 60% to come (Marszal 2014).

Figure 1: value of the total assets of the trusts and foundations featured in the *Guide to Major Trusts Volume 1*

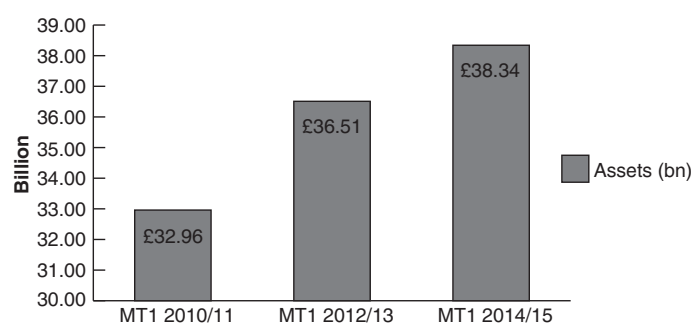
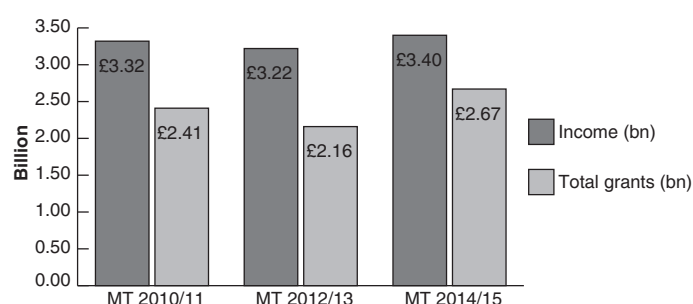


Figure 2: value of the total income and grants of the trusts and foundations featured in the *Guide to Major Trusts Volume 1*



Thousands of charities across the UK provide valuable support to the most disadvantaged and vulnerable and their services are more in demand than ever before. An often vital source of funding to help them deliver their services comes from grant-making trusts and foundations. As figure 2 shows, the organisations featured in this book provided grants totalling almost £2.67 billion to a wide range of charities, community groups, social enterprises and educational institutions during the latest year for which financial information was available: in most cases

¹ Funding from the Big Lottery Fund increased from £374 million (2010/11) in the previous edition to over £778 million (2012/13) described here. It should be noted, however, that the figure for 2010/11 would have been £200 million higher had this amount not slipped into the 2011/12 financial year.

Top 25 trusts (excluding Big Lottery Fund and Awards for All)

The Guide to Major Trusts Volume 1 – 2012/13

| | Total grants |
|--|----------------------|
| 1 The Wellcome Trust | £551.5 million |
| 2 Comic Relief | £58.2 million* |
| 3 The Leverhulme Trust | £53.4 million |
| 4 BBC Children in Need | £41.7 million |
| 5 The Football Foundation | £40.5 million |
| 6 The Garfield Weston Foundation | £34.2 million |
| 7 The Gatsby Charitable Foundation | £33.1 million |
| 8 The Monument Trust | £32 million |
| 9 The Wolfson Foundation | £28.2 million |
| 10 Esmée Fairbairn Foundation | £27.6 million |
| 11 The Henry Smith Charity | £24.9 million |
| 12 Lloyds TSB Foundation for England and Wales | £23.4 million |
| 13 The Sigrid Rausing Trust | £21.3 million |
| 14 The Tudor Trust | £19 million |
| 15 Paul Hamlyn Foundation | £18.7 million |
| 16 The City Bridge Trust | £16.8 million |
| 17 Age UK | £16 million |
| 18 Wales Council for Voluntary Action | £14.8 million |
| 19 The Northern Rock Foundation | £12.4 million |
| 20 The Coalfields Regeneration Trust | £12.1 million |
| 21 The Trust for London | £10.4 million |
| 22 The Shetland Charitable Trust | £10.3 million |
| 23 The Robertson Trust | £9.7 million |
| 24 J Paul Getty Jr Charitable Trust | £9.5 million |
| 25 Allchurches Trust Ltd | £8.3 million |
| Total | £1.13 billion |

* £19.7 million in the UK

** £32.3 million in the UK

The Guide to Major Trusts Volume 1 – 2014/15

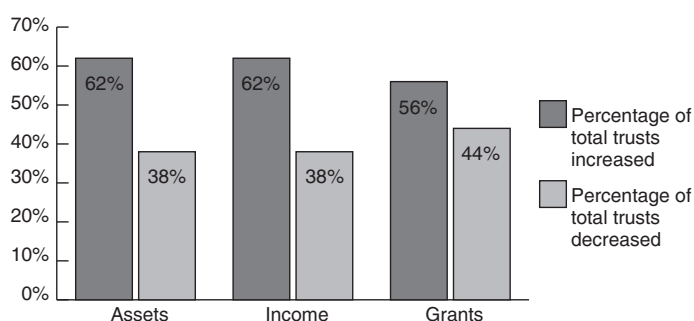
| | Total grants |
|--|----------------------|
| 1 (1) ^ The Wellcome Trust | £511.1 million |
| 2 (3) The Leverhulme Trust | £80.4 million |
| 3 (2) Comic Relief | £78 million** |
| 4 (9) The Wolfson Foundation | £49.7 million |
| 5 (6) The Garfield Weston Foundation | £46 million |
| 6 (8) The Monument Trust | £45 million |
| 7 (7) The Gatsby Charitable Foundation | £42.7 million |
| 8 (10) Esmée Fairbairn Foundation | £32.4 million |
| 9 (4) BBC Children in Need | £31.2 million |
| 10 (-) The Gosling Foundation Limited | £27.5 million |
| 11 (11) The Henry Smith Charity | £27 million |
| 12 (12) Lloyds Bank Foundation for England and Wales | £21 million |
| 13 (16) The City Bridge Trust | £19 million |
| 14 (15) Paul Hamlyn Foundation | £17.7 million |
| 15 (14) The Tudor Trust | £17.5 million |
| 16 (-) The Clore Duffield Foundation | £17 million |
| 17 (13) The Sigrid Rausing Trust | £17 million |
| 18 (5) The Football Foundation | £16.8 million |
| 19 (17) Age UK | £16 million |
| 20 (20) The Coalfields Regeneration Trust | £15.6 million |
| 21 (23) The Robertson Trust | £14.7 million |
| 22 (-) The Mercers' Charitable Foundation | £11.8 million |
| 23 (18) Wales Council for Voluntary Action | £11.5 million |
| 24 (21) The Trust for London | £11.4 million |
| 25 (22) The Shetland Charitable Trust | £10.6 million |
| Total | £1.19 billion |

^ figures in brackets show position in the previous edition

the 2011/12 financial year. This represents an overall increase of around 23%.²

But this overall increase in assets, income and total grants does not tell the whole story. Looking at the individual funders reveals that while there are those that have increased their funding, many have decreased their grant-making since last time. Figure 3 shows the percentage of the 400 trusts contained in this book and the variance in their assets, income and grants compared to the previous edition.

Figure 3: Percentage of trusts whose assets, income and grant total have increased and decreased



Significant reductions in grants came from funders, including:

- the Wellcome Trust, which again reduced its overall grant total, giving £511.1 million in 2011/12 compared to £551.5 million in 2009/10;
- the Football Foundation, which gave £16.8 million in 2011/12 compared to £40.5 million in 2009/10;
- BBC Children in Need, which gave £31.2 million in 2011/12 compared to £41.7 million in 2009/10.

As noted previously, however, decreases in funding are not necessarily due to a difficult economic climate. The Wellcome Trust, for example, again saw the value of its assets increase, this time by £498.5 million since the last edition, although conversely a relatively small decrease in income of £7.7 million. A decrease in grants of £40 million since the last edition simply reflects routine regular fluctuations from year to year, and with funding from this huge trust typically exceeding half a billion pounds each year, relatively small decreases of around 7% can distort the overall picture. In the case of BBC Children in Need, its financial year for this edition covered just nine months because the charity changed its year end to fit in with its major appeal, resulting in a lower grant expenditure. Also

² Excluding the Big Lottery Fund, total grants in this edition have risen by around 5.7%.

A typical trust entry

| | |
|--|--|
| The Fictitious Trust | |
| Welfare | |
| £1.3 million (2013) | |
| Beneficial area | |
| UK. | |
| Correspondent: Ann Freeman, Appeals Secretary, The Old Barn, Main Street, New Town ZC48 2QQ | |
| Trustees: Eva Appiah; Rita Khan; Lorraine Murphy. | |
| CC Number: 123456 | |
| The trust supports welfare charities in general, with an emphasis on homelessness. The trustees will support both capital and revenue projects. 'Specific projects are preferred to general running costs.' | |
| In 2013 the trust had assets of £20.3 million and an income of £1.5 million. Over 200 grants were given totalling £1.3 million. Grants ranged from £5,000 to £200,000, with about half given in New Town. Beneficiaries included: Homelessness UK (£200,000); Shelter (£150,000); Charity Workers Benevolent Society (£80,000); Children Without Families (£50,000); New Town CAB (£10,000); and Ex-Offenders UK (£5,000). | |
| Smaller grants were given to a variety of local charities, local branches of national charities and a few UK welfare charities. | |
| Exclusions | |
| No grants to non-registered charities, individuals or religious organisations. | |
| Applications | |
| In writing to the correspondent. Trustees meet in March and September each year. Applications should be received by the end of January and the end of July respectively. | |
| Applications should include a brief description of the project and audited accounts. Unsuccessful applicants will not be informed unless a stamped, addressed envelope is provided. | |
| Percentage of awards given to new applicants: between 10% and 20%. | |
| Common applicant mistakes | |
| 'They don't read our guidelines.' | |
| Information gathered from: | |
| Accounts; Charity Commission record; further information provided by the funder. | |

Name of the charity

Summary of main activities – what the trust will do in practice rather than what its trust deed allows it to do.

Grant total – total grants given for the most recent year available.

Geographical area of grantgiving – including where the trust can legally give and where it gives in practice.

Correspondent and contact details – including telephone and fax numbers, and email and website addresses, if available.

Trustees

Background/summary of activities – a quick indicator of the trust's policies to show whether it is worth reading the rest of the entry.

Financial information – noting the assets, ordinary income and grant total, and comment on unusual figures.

Typical grants range – indicates what a successful applicant can expect to receive.

Beneficiaries included – a list of typical beneficiaries which indicates where the main money is going. This is often the clearest indication of trust priorities. Where possible, we include the purpose of the grant. We also indicate whether the trust gives one-off or recurrent grants.

Exclusions – a list of any area, subjects or types of grant the trust will not consider.

Applications – this includes how to apply and when to submit an application.

Percentage of awards given to new applicants – the grant-maker's response to DSC's 2013 survey.

Common applicant mistakes – the grant-maker's response to DSC's 2013 survey.

Information gathered from – our researchers' sources of information.

The Sylvia Adams Charitable Trust

Disability, welfare, poverty, children and young people, social disadvantage

£1.2 million (2011/12)

Beneficial area

Hertfordshire; work in the UK which has a national impact; and Kenya, Tanzania and Uganda.

Correspondent: Jane Young, Director, Sylvia Adams House, 24 The Common, Hatfield, Hertfordshire AL10 0NB (tel: 01707 259259; fax: 01707 259268; email: info@sylvia-adams.org.uk; website: www.sylvia-adams.org.uk)

Trustees: Richard J. Golland; Mark Heasman; Timothy Lawler.

CC Number: 1050678

This trust was set up using the income from the sale of works of art, following Sylvia Adams' death. The trust's aim is to improve the quality of life of those who are disadvantaged, through the alleviation of disease, sickness and poverty.

Grants generally range from £5,000 to a maximum of £30,000, though occasionally a grant may be made for £50,000. Most grants will be for one or two years, although grants can be made for three.

Grants are made in the following categories:

- ▶ Children and young people
- ▶ People with a disability
- ▶ People living in poverty or who are disadvantaged

The trust is particularly interested in helping people to become self-supporting and self-help projects. UK focus is on enabling people to participate fully in society. Worldwide, the focus is on primary healthcare and health education, access to education, appropriate technology and community enterprise schemes. Both UK causes providing a national benefit and causes local to Hertfordshire are supported, as well as UK charities working overseas. The trust funds specific projects but will also consider core funding.

The trust reviews its priorities each year within its overall guidelines and up to date information is available on its website. Interests in Hertfordshire and the UK currently include:

Hertfordshire and the UK

Children and young people

We are looking to support organisations that are working with socially disadvantaged and excluded children and young people, and which are giving them opportunities to develop in ways that will

enable them to become resilient and capable adults. We are particularly interested in:

- ▶ Work which addresses the needs of children at risk of neglect and who are affected by lack of appropriate parenting
- ▶ Work with young people that will give them the chance to acquire essential life skills such as communication, self discipline, motivation and empathy. This includes projects that focus on challenging activities, sport, the arts and access to the natural environment.

Disability

We are looking to support organisations that improve the lives of people with disabilities with a particular emphasis on:

- ▶ Innovations that have the potential to bring about significant improvements (excluding medical research)
- ▶ Sporting and cultural activities, and access to the natural environment
- ▶ Conditions that are less publicised or generally known and therefore attract less public support.

* We have an interest in employment issues but are not currently seeking new projects in this area

Poverty and Social Exclusion

We are interested in supporting organisations that work with people living in poverty or who are socially excluded, enabling them to access a better long-term future. This will include:

- ▶ Work which addresses homelessness
- ▶ Sporting and cultural activities, and access to the natural environment
- ▶ The particular problems facing some rural communities.

* We are prepared to consider local projects in England and Wales where there is the potential for impact on poverty and social exclusion within rural communities.

Overseas

For 2013/14 we will continue to support projects in Kenya, Tanzania and Uganda. We will not consider applications for work in other countries.

We will only consider applications from organisations with an average income over £50,000 a year.

We are interested in:

- ▶ Education
- ▶ Water and sanitation
- ▶ High impact health initiatives
- ▶ Initiatives to help small scale farmers

Check the trust's website for current priorities.

Grantmaking in 2011/12

In 2011/12 the trust had assets of £7.9 million and an income of £209,500. Grants were made totalling £1.2 million, and were summarised as follows:

| | |
|---------------------|----------|
| UK | £583,000 |
| Overseas | £314,000 |
| Hertfordshire | £185,000 |
| Grants under £5,000 | £97,000 |
| Trustee grants | £20,000 |

UK beneficiaries included: Down Syndrome Association (£50,000), for an employment project; Raleigh International (£30,000) towards its Youth Agency Partnership Programme; Jubilee Sailing Trust (£26,500), for the costs of an additional fundraiser; Stonewall (£20,000), for a youth programme; Volunteer Reading Project (£15,000), to fund reading support for an additional 90 children; Unique (£10,000), towards IT and fundraising costs; London Youth (£10,000), towards the renovation of Woodrow House (£10,000); Housing Justice (£6,000), towards project work; and Host (£5,000), core funding.

Beneficiaries in Hertfordshire included: YMCA Central Hertfordshire (£25,000), for the SPACE project in Hatfield; Groundwork Herts (£12,500), towards a summer holiday scheme; Letchworth Arts Centre (£7,500), for two arts interns; Greenside Studio (£5,000), towards the purchase of a vehicle; and React (£2,500), towards equipment.

Exclusions

The trust does not give grants to:

- ▶ Individuals
- ▶ Projects in the Middle East or Eastern Europe or the countries of the ex-Soviet Union
- ▶ Work that solely benefits elderly people
- ▶ Organisations helping animals, medical research or environmental causes

Applications

There is a two stage application process: Stage 1 can **only** be made through the trust's website; applicants who successfully get through this stage will be asked to submit a fuller Stage 2 application.

Telephone queries about the guidelines and application process are welcome in advance of applications being made.

Percentage of awards given to new applicants: between 40% and 50%.

Common applicant mistakes

'Not applying through the right medium; not reading application instructions on the trust's website in their entirety.'

Information gathered from:

Accounts; annual report; Charity Commission record; further information provided by the funder; funder's website.

THE GUIDE TO MAJOR TRUSTS VOLUME 1

2014/15

The new edition of the companion directory to *The Guide to Major Trusts Volume 2*.

These bestselling guides are essential aids for all those seeking to raise money for charity from grant-making trusts and foundations.

This fourteenth edition:

- Covers the top 400 UK trusts, making annual awards totalling almost £2.67 billion
- Lists the grant-giving of each trust, ranging from £300,000 to £551.1 million a year
- Details 28 trusts new to this volume
- Provides clear descriptions of trusts' grant-making policies and practices, as well as examples of the donations made
- Includes contact details and advice to applicants
- Features coverage of the impact of the recession on grant-making trusts and their beneficiaries
- Includes full regional and subject indexes
- Provides advice direct from trusts on common applicant mistakes to help you make better funding applications

New to this edition:

Information from trusts on the percentage of awards made to new applicants.

'These guides save considerable time and effort in identifying the right trusts to approach for particular fundraising projects. Concise and well-presented information, as well as clear categorisation, make them user-friendly and, like old friends, wonderfully dependable.'

Peter Wallace, Development Officer (Research & Trusts)
University of Hull

'A grant fundraiser's lifeline to simplify their research and determine their eligibility for grants.'

Bal Kainth, Fundraising Assistant
Little Hearts Matter

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DSC is the leading voluntary sector publisher and provider of charity training, conferences and grant-finding websites.

ISBN 978-1-906294-85-4



9 781906 294854

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