

2017/18

THE GUIDE TO

MAJOR TRUSTS

15th edition

Jennifer Reynolds
& Jodie Huyton



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Additional research by:
Rachel Cain, Anne Cutress, Carly Hobson,
Denise Lillya and Ian Pembridge



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Head office: Resource for London, 352 Holloway Rd, London N7 6PA

Northern office: Suite 103, 1 Old Hall Street, Liverpool L3 9HG

Tel: 08450 77 77 07

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Foreword

These are interesting times for charity fundraising in the UK. With unprecedented media and political scrutiny interrogating the integrity, purpose and practice of fundraising for the last year and more, we fundraisers have been collectively searching our souls to clarify who we are, why we exist and the job we're here to do.

For me, the answers to these questions are actually quite simple. We are the great storytellers. We inspire people to join with us to help deliver on the ambitions of our cause – and ultimately make the world a better place. We're about more than just raising funds – great fundraising empowers people to bring about great social change. To support the most vulnerable, to tackle society's most intractable problems, to connect and transform. Fundraisers bring the vision of their charity to life and mobilise the resources necessary to achieve it.

It is incumbent upon fundraisers to reach out and connect with those who most share the same ambitions, purpose, values and drive to tackle the issues for which their charity exists to solve. Very rarely will a charity already have access to all the resources it requires to deliver its mission. More typically, it will be necessary to build its capacity in terms of people, social capital, networks, ideas, influence, voice and funds. Fundraisers must build long-term relationships with a wide range of people to build this capacity – with wealthy philanthropists, businesses, the altruistic public and, of

course, with the mighty community of grant-making charities.

It is with this in mind that I'm delighted to welcome the latest edition of *The Guide to Major Trusts*. The grant-making charities you find in this volume share your vision of a better world. They exist for the same reason as fundraisers: to solve social problems through mobilising and focusing resources. Each and every one of them has been created to tackle a specific cause. The guide is here to help you connect with those prioritising the same issues as you do.

With all the latest detail on just over 1,000 of the major grant-making charities in the UK, you can use the guide to uncover new opportunities while also updating information on any relationships you already hold. For more than 30 years, this guide has evolved into a single volume of invaluable information that equips fundraisers in charities of all sizes, whether you're new to fundraising or have been inspiring change for over 30 years yourself.

It's never been a more important time to ensure we're getting our fundraising right. Fundraisers are crucial to social change. And this latest guide provides a crucial tool for every charity that is serious about achieving its vision. I wish you every success with your mission.

Joe Jenkins
Director of Fundraising & Supporter Engagement,
The Children's Society, and Trustee, Refugee Action

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 grant-

makers, 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 fifteenth edition of *The Guide to Major Trusts*.

Readers who are familiar with this publication may have already noticed this edition's new-look front cover – but it's not only the aesthetics that have changed. This publication brings together the largest grant-makers from volumes one and two of *The Guide to Major Trusts*, along with some that have never been featured before in any DSC publications. One thing that remains unchanged is the guide's purpose: to provide a comprehensive and practical funding resource that enables charity professionals, including trustees, chief executives, fundraisers and volunteers, to access the billions of pounds awarded in the UK by grant-makers each year.

About the funders in this guide

There are just over 1,000 funders detailed in this guide that gave a total of £5.62 billion in grants.

Although the vast majority of these funders are registered grant-making charities, there are also a number that are not, such as the Big Lottery Fund, the Heritage Lottery (giving £437.5 million in grants during the 2014/15 financial year) and the arts councils including Creative Scotland. Excluding the funding given by these bodies, funding from grant-making charities amounted to around £3.32 billion. All of the funders in this publication make grants to UK-registered charities and, as a general rule, have the capacity to give at least £185,000 in grants each year.

This guide includes a diverse range of grant-makers: from those supporting general charitable purposes (48.8% of the funders in this guide) and charities working in areas such as social welfare (56.4%), health (49.4%) or education (51.9%), to those specifically concentrating on so-called less popular causes such as charities helping people that suffer from substance abuse, domestic violence victims and LGBT groups.

In this edition, we've also included newly registered grant-makers. Examples of these include:

- ▶ The Virgin Money Foundation: registered with the Charity Commission in 2015, it assumed the mantle of the Northern Rock Foundation; the Northern Rock

Foundation is currently winding up following the takeover by Virgin Money in 2012

- ▶ The Masonic Charitable Foundation: also registered in 2015, this foundation takes over the work of the four central Masonic charities

Furthermore, this guide includes grant-makers never before featured in this publication, more than 20 of which are new to DSC's database.

We hope that the new format of this guide, combining two volumes in one as well as the new and first-time additions, will ensure that this resource is as inclusive and useful as it can be for all those fundraising at a time when our sector's resources are under more strain than ever.

What we've found

Over the course of researching this guide, the DSC Research Team gathered information from almost 1,000 annual reports, accounts and websites. As with all of our funding publications, we used the most recent financial information available at the time of writing which, for the majority of grant-makers, was the 2014 and 2014/15 financial years.

As noted in the Top 25 table, grant-making charities gave a combined total of £1.82 billion, accounting for 32.3% of this edition's grant total. In the last edition, the contributions made by the top 25 amounted to £1.19 billion. For this edition the cut-off figure for inclusion in the top 25 is a giving total of £19.8 million, compared with £10.6 million in the last edition.

As is our usual practice, we haven't included public bodies – the Big Lottery Fund, Awards for All, Heritage Lottery Fund, the Arts Council and Creative Scotland – in this table partly as it is an opportunity to celebrate grant-makers that are registered charities. The other reason for not including these organisations is that the large sums of money they distribute (a combined £2.3 billion in this edition) would warp our view of regular grant-making charities' giving.

The increased overall figure of grant-making from the top 25 funders includes the following particular examples of charities that awarded a higher amount in 2014/15:

- ▶ BBC Children in Need gave £54.8 million in 2014/15 compared with £31.2 million in the last edition (2011/12 financial year); however, the grant total from

A typical entry

The Fictitious Charity	Name of the charity
Social welfare, education, health	Summary of main activities: what the funder does in practice
£1.3 million (2014)	Grant total: total grants given for the most recent financial year available.
Beneficial area UK, with some preference for New Town.	Geographical area of grant-making: including where the funder can legally give and where it gives in practice.
Correspondent: Ann Freeman, Appeals Secretary, The Old Barn, Main Street, New Town ZC48 2QQ	Correspondent and contact details: including telephone and fax numbers, and email and website addresses, if available.
Trustees: Eva Appiah; Rita Khan; Lorraine Murphy.	Trustees
CC Number: 123456	General information: a summary of the funder's policies. The amount of information here varies from funder to funder and, sometimes, we use subheadings to make it easier to read. These also vary depending on the particular funder and the information that is available.
General information This charity makes grants to organisations working in the areas of social welfare (particularly homelessness), education and health. The trustees will support both capital and revenue projects; the annual report for 2014 stated that 'specific projects are preferred to general running costs'.	Financial information: the assets, ordinary income and grant total. We also mention here if we have noticed anything interesting and unusual about the figures.
Financial information In 2014 the charity 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: a list of typical beneficiaries which indicates where the main money is going. This is often the clearest indication of what a funder is prepared to fund.
Beneficiaries included: Homelessness UK (£200,000); Shelter (£150,000); Charity Workers Benevolent Society (£80,000); Learning Foundation (£50,000); New Town CAB (£10,000); Getwell Hospice 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: a list of any area, subjects or types of grant the funder will not consider supporting.
Exclusions No grants are made to non-registered charities, individuals or religious organisations.	Applications: this includes how to apply and, where available, when to submit an application.
Applications Apply in writing to the correspondent. The 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 an sae is provided.	Sources of information: where we have obtained the information in the entry from.
Sources of information Annual report; accounts; Charity Commission record; further information provided by the funder.	

The 1970 Trust

Disadvantaged minorities in the UK

Around £270,000 (2014/15)

Beneficial area
UK.

Correspondent: The Trustees of the 1970 Trust, 12 St Catherine Street, Cupar, Fife KY15 4HN (tel: 01334 653777; email: enquiries@pagan.co.uk)

OSCR number: SC008788

General information

The trust has previously stated that it supports small UK charities 'doing innovative, educational, or experimental work' in the following fields:

- ▶ Civil liberties (e.g. freedom of information; constitutional reform; humanising work; children's welfare)
- ▶ The public interest in the face of vested interest groups (such as the advertising, alcohol, road, war, pharmaceuticals and tobacco industries)
- ▶ Disadvantaged minorities, multiracial work, prison reform
- ▶ New economics ('as if people mattered' – Schumacher) and intermediate technology
- ▶ Public transport, pedestrians, bicycling, road crash prevention, traffic-calming, low-energy lifestyles
- ▶ Preventative health

Grants are usually of between £300 and £2,000 and for between one and three years, but they can sometimes cover longer periods.

Financial information

In 2014/15 the trust had an income of £14,800, and a total expenditure of £279,000. Accounts were not available online; we estimate that the amount of grants totalled around £270,000.

Previous beneficiaries have included:

Scarman Trust; Roadpeace; Public Interest Research Centre; Earth Resources; Parents for Children; Parent to Parent; Slower Speeds Trust; Prisoners' Wives; Pesticides; Blackcare; and Shelter Winter Night.

Exclusions

No support is given for larger charities, those with religious connections, or individuals (except in rare cases and then only through registered charities or educational bodies). No support is provided to central or local government agencies.

Applications

Apply in writing to the correspondent. Proposals should be summarised on one page with one or two more pages of supporting information. The trust states that it regrettably only has time to reply

to the very few applications it is able to fund.

Sources of information

OSCR record.

The 1989 Willan Charitable Trust

General charitable purposes. In practice mainly organisations supporting: children, older people, people with mental and physical disabilities, and medical research

£492,000 to organisations (2014/15)

Beneficial area

Worldwide, in practice mainly the north east of England.

Correspondent: Community Foundation Tyne and Wear and Northumberland, The 1989 Willan Charitable Trust, c/o Community Foundation, Philanthropy House, Woodbine Road, Gosforth, Newcastle Upon Tyne NE3 1DD (tel: 0191 222 0945; fax: 0191 230 0689; email: general@communityfoundation.org.uk; website: www.communityfoundation.org.uk/funds/the-1989-willan-charitable-trust)

Trustees: Francis A. Chapman; Alex Ohlsson; Willan Trustee Ltd.

CC number: 802749

General information

The trust was established in 1989 out of funds originating from a shipping business. It was set up for general charitable purposes, with a preference for benefitting organisations in the north east of England.

The 2014/15 annual report notes the following:

In recognition of the origins of the trust fund and the economic impact that the decline of shipbuilding has had on the region, the trustees tend to concentrate their support towards causes which are active in Tyne & Wear and its immediate surrounds. The trustees favour causes which aim to ease social deprivation and/or enrich the fabric of the local community and the quality of life of individuals within that community. They may also support education where that is aimed at improving the economy in areas of deprivation.

In considering which local causes to support and the level of support given, the trustees will also have regard to an applicant's ability to raise funds elsewhere. Consequently, the trustees tend to weight their support towards local charitable institutions rather than national or international ones on the basis that the

larger institutions enjoy higher profiles and will typically have wider access to funds.

In cases of great need such as major natural disasters, conflicts or accidents, causes may be supported outside the trustees' normal parameters stated above.

Grant awards typically range from £1,000 to £10,000.

Financial information

In 2014/15 the trust had assets of £16.7 million and an income of £547,000. There were 167 grants made totalling £498,500, of which 154 grants were for organisations totalling £492,000 and the rest went to individuals totalling £6,500. The trust's accounts give the following breakdown of how the money was distributed by sector, region and size of grant:

Sector

Building our children's future	61	£193,500
Taking part in community life	56	£173,500
Improving health	39	£101,500
Enjoying later life	9	£24,500
Stimulating growth and employment	1	£3,500
Caring for our environment	1	£1,600

Region

Newcastle	46	£134,000
Durham	26	£103,000
Sunderland	20	£67,500
Northumberland	27	£54,500
Stockton	7	£31,500
Middlesbrough	7	£23,500
Darlington	5	£19,000
South Tyneside	6	£14,000
North Tyneside	6	£13,500
Gateshead	5	£13,400
Redcar	3	£11,300
'Out of area'	7	£7,000
Hartlepool	2	£6,500

Size of grant

More than £10,000	1	£20,000
£5,001 – £10,000	12	£99,500
£1,001 – £5,000	136	£369,000
£1,000 or less	18	£10,000

A list of beneficiaries was not included in the accounts. **Previous beneficiaries have included:** SAFC Foundation and Cancer Connexions (£10,000 each); Amble Multi Agency Crime Prevention Initiative (£6,000); Durham City Centre Youth Project, The Children's Society and the Calvert Trust (£5,000 each); Chester le Street Youth Centre (£4,000); Different Strokes North East, Northern Roots and People and Drugs (£3,000 each); Leukaemia Research and Coast Video Club (£2,000 each); Northumberland Mountain Rescue and the Association of British Poles (£1,000 each); Healthwise and Newcastle Gang Show (£500).