

2019/20

THE GUIDE TO

# MAJOR TRUSTS

16th edition

Ian Pembridge  
& Scott Mason



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## Foreword

The best form of fundraising is always a partnership. Whether we are seeking to persuade a member of the public to support our cause with a modest donation, or making a bespoke application to a grant-maker, the approach in each case differs but our aim should be the same – to inspire others to join us to make a difference in the world together.

An important factor in this inspiration is a clear sense of the impact potential supporters could have by joining forces with us. All too often, this can sadly get lost in the mechanics of fundraising, but it is absolutely vital that it sits at the heart of any request for support. This was reinforced to me recently at a ‘Meet the Funder’ conference session where the importance of demonstrating impact came through strongly as a key theme. Equally important is making sure you approach those most likely to want to partner with you – again this applies more generally but is one of the essentials in any approach to a grant-maker.

This is why I was delighted to be asked to introduce the latest edition of *The Guide to Major Trusts*. How very fortunate that in an ever-changing and increasingly

uncertain funding environment, we can continue to rely on the veritable mine of up-to-date information contained in this guide. I first came across it over twenty-five years ago and it is as valuable now as it was then – providing clear, comprehensive information to help you navigate through this complex world and find the partners that will be right for your charity.

The grant-makers in this guide give a combined annual total of £5.5 billion in grants, showing just how significant these sources of funding continue to be. Accessing available grants however remains a highly competitive process, requiring us to do our research carefully. Once we understand which potential partners are most likely to support our causes, and which aspect of our aims chime particularly with theirs, we increase our chances of success immeasurably. If we combine a targeted approach with a clear sense of the impact we could have together, our chances of success increase even further. With this in mind, I recommend this guide most highly to you and wish you every success in inspiring the partners that are right for your mission.

**Kath Abrahams**

**Director of Engagement and Fundraising, Diabetes UK**

## 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 in achieving 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, as well as offering bespoke research for the voluntary sector

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. Our subscription-based websites contain 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 and fairs, which take place throughout the year, also provide training on a wide range of topics and offer a welcome opportunity for networking.

For details of all our activities, and to order publications and book courses, go to [www.dsc.org.uk](http://www.dsc.org.uk), call 020 7697 4200 or email [cs@dsc.org.uk](mailto:cs@dsc.org.uk).

# Introduction

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Welcome to the sixteenth edition of *The Guide to Major Trusts*. The purpose of the guide is 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.

## Data collection

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This guide contains over 1,000 of the UK's largest grant-makers taken from DSC's database, which contains details of over 4,500 charitable funders.

Over the course of our research, we looked at Charity Commission records, annual reports and accounts, websites and occasionally directly contacted the grant-makers themselves. In this edition, the majority of the accounts we used were from 2016/17 (67%) and 2016 (23%). However, some charities' accounts were not available to view on the Charity Commission's website due to them having an income of less than £25,000. In these circumstances, grant totals were estimated based on the charity's total expenditure and previous patterns of giving. Where up-to-date accounts had not been submitted, the latest available accounts were used.

## Criteria for inclusion

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To be included in the guide, grant-makers should have the capacity to make at least £200,000 in grants in the UK per year. Those in the guide with grant totals under this threshold may have given over this amount in previous years or are likely to have the capacity to exceed this amount in the near future. In order to make the guide as useful as possible to fundraisers, certain grant-makers have been excluded. These are mainly:

- ▮ Grant-makers that predominantly give overseas
- ▮ Grant-makers that give to a small number of beneficiaries each year
- ▮ Grant-makers that give to the same beneficiaries each year
- ▮ Grant-makers that give to individuals only

We also exclude grant-makers that have ceased to exist or are being wound up with any remaining funds fully committed. Some of the larger grant-makers that are in the

process of winding up or have wound up since the last edition of this guide include:

- ▮ Tesco Charity Trust
- ▮ The HB Allen Charitable Trust
- ▮ The Audrey and Stanley Burton 1960 Charitable Trust
- ▮ The Connie and Albert Taylor Charitable Trust

In this edition, we have included over 200 grant-makers that have not been included in previous editions of the guide. These are a mixture of grant-makers that have increased their grant-making capacity, newly registered grant-makers and grant-makers not previously known to us.

## Findings

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The 1,004 grant-makers included in this guide awarded a combined total of £5.5 billion in grants. A further £75.5 million was distributed by the 46 UK community foundations listed in the table on page 483.


Although the vast majority of these funders are registered grant-making charities, there are also a number which are not. Some of the largest funders, such as the Big Lottery Fund, the Heritage Lottery (giving £432.6 million in grants during the 2016/17 financial year) and the arts councils (including Creative Scotland) are non-departmental public bodies. Excluding the funding given by these bodies, funding from grant-making charities amounted to £3.65 billion. If we look at the 697 grant-makers which appear in both this edition and the previous edition, there has been an overall increase in giving of £178.4 million, or 6.2%.


This guide includes a diverse range of grant-makers: from those supporting general charitable purposes (41.6% of the funders in this guide) and charities working in areas such as social welfare (59%), health (50.4%) or education (50.2%); to those specifically concentrating on so-called less popular causes, such as providing support for people suffering from substance abuse, victims of domestic violence and LGBT groups.

The top 25 funders gave a combined £1.86 billion, accounting for 33.9% of this edition's grant total. In the last edition, the contributions made by the top 25 amounted to £1.82 billion. However, The Wellcome Trust's grant total has increased by over £130 million from the last edition. The Wellcome Trust is the largest grant-maker in the guide (giving just over £930 million in 2016/17) and its annual giving can often have a significant

# A typical entry

## The Fictitious Charity

 Social welfare, education, health

 UK, with some preference for New Town

 £1.3 million (2016/17)

**CC number:** 123456

**Trustees:** Eva Appiah; Rita Khan; Lorraine Murphy.

**Correspondent:** Ann Freeman, Appeals Secretary, The Old Barn, Main Street, New Town ZC48 2QQ

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 2016/17 stated that 'specific projects are preferred to general running costs'.

### Financial information

In 2016/17 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:** Homelessness UK (£200,000); Shelter (£150,000); Charity Workers Benevolent Society (£80,000); Learning Foundation (£50,000); New Town Citizens Advice (£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

No grants are made to non-registered charities, individuals or religious organisations.

### 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

Annual report; accounts; Charity Commission record; further information provided by the funder.

• **Name of the charity**

• **Summary of main activities:** what the funder does in practice.

• **Geographical area of grant-making:** including where the funder can legally give and where it gives in practice.

• **Grant total:** total grants given for the most recent financial year available.

• **Trustees**

• **Correspondent and contact details:** including telephone and fax numbers, and email and website addresses, if available.

• **General information:** a summary of the funder's policies. The amount of information here varies from funder to funder – sometimes we use subheadings to make it easier to read. These also vary depending on the particular funder and the information that is available.

• **Financial information:** the assets, ordinary income and grant total. We also mention here if we have noticed anything interesting and unusual about the figures.

• **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.


• **Exclusions:** a list of any areas, subjects or types of grant the funder will not consider supporting.


• **Applications:** this includes how to apply and, where available, when to submit an application.

• **Sources of information:** where we have obtained the information in the entry from.

# Grant-makers in alphabetical order

## The 1989 Willan Charitable Trust

 General charitable purposes, community development, social welfare


 Tyne and Wear, Northumberland, County Durham and Teesside

 £477,000 to organisations (2015/16)

**CC number:** 802749

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

**Correspondent:** Community Foundation Tyne & 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; email: general@communityfoundation.org.uk)

 [www.communityfoundation.org.uk/funds/the-1989-willan-charitable-trust](http://www.communityfoundation.org.uk/funds/the-1989-willan-charitable-trust)

The trust was established in 1989 out of funds originating from a shipping business, for general charitable purposes, with a preference for benefitting organisations in the north east of England. The 2015/16 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 and 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 are given for core costs or projects, and awards typically range from £500 to £10,000, although there is no maximum or minimum grant. Projects where the trust represents a significant contribution to a project are prioritised. The trust can also provide in-kind support, in the form of premises for charitable organisations.

The Community Foundation Tyne and Wear and Northumberland provides administrative support to the trust's grant-making in the North East region, receiving and vetting applications for the trustees.

### Financial information

In 2015/16 the trust had assets of £18.6 million and an income of £590,000. During the year, 167 grants were made, totalling £477,000, which were broken down as follows:

### Sector

Taking part in community life	55	£238,500
Building our children's future	45	£141,000
Improving health	25	£78,000
Enjoying later life	5	£18,000
Caring for our environment	1	£1,000

### Region

Northumberland	31	£101,000
Newcastle	19	£64,500
Durham	11	£56,000
Out of area	20	£49,000
Gateshead	13	£39,500
Hartlepool	8	£35,000
Darlington	5	£32,000
Sunderland	7	£29,500
Stockton	4	£21,500

Middlesbrough	5	£18,800
South Tyneside	2	£15,000
North Tyneside	5	£13,000
Redcar	1	£2,500

### Size of grant

£1,001 to £5,000	92	£242,000
£5,001 to £10,000	27	£229,500
£1,000 or less	12	£5,400

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 each).

### Exclusions

The website gives the following information:

Please note that grants will not be available to fund:

- ▶ Statutory organisations including schools or activities eligible for public funding
- ▶ Trips abroad
- ▶ Projects focused on:
  - ▶ Heritage and the environment
  - ▶ Religion and the promotion of faith
  - ▶ Scientific and/or medical research

Unless these address deprivation and/or enrich local communities and improve local quality of life.

Applicants that do not provide feedback on previous awards from the 1989 Willan Charitable Trust within the required timescale will not generally be considered for further funding.

# Subject index

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The following subject index begins with a list of categories used. The categories are very wide-ranging, in order to keep the index as simple as possible. DSC's subscription website ([www.trustfunding.org.uk](http://www.trustfunding.org.uk)) has a much more detailed search facility for the categories. There may be considerable overlap between the categories – for example, children and education, or older people and social welfare.

The list of categories is followed by the index itself. Before using the index, please note the following.

## How the index was compiled

- 1) The index aims to reflect the most recent grant-making practice. It is therefore based on our interpretation of what each funder has given to, rather than what its policy statement says or what its charitable objects allow it to do in principle. For example, where a grant-maker states that it has general charitable purposes, but its grants list shows a strong preference for social welfare, we index it under social welfare.
- 2) The index has been compiled from the latest information available to us.

## Limitations

- 1) Policies may change – some more frequently than others.
- 2) Sometimes there will be a geographical restriction on a funder's grant-giving which is not shown in this index, or the grant-maker may not give for the specific purposes you require under that heading. It is important to read each entry carefully.

You will need to check whether:

- (a) The grant-maker gives in your geographical area of operation
- (b) The funder gives for the specific purposes you require
- (c) There is no other reason to prevent you from making an application to this grant-maker

**Under no circumstances should the index be used as a simple mailing list. Remember – each funder is different. Often the policies or interests of a particular grant-maker do not fit easily into the given categories. Each entry must be read individually before you make an application. Indiscriminate applications are usually unsuccessful. They waste time and money, as well as greatly annoying the funders.**

The categories are as follows.

## Arts, culture, sport and recreation *page 490*

A very diverse category including: performing, written and visual arts; crafts; theatres; museums and galleries; heritage; architecture; archaeology; and sports and recreation. As this is such a varied category, we have also included sections with more specific sub-headings.

### *Arts and culture page 490*

### *Heritage and the built environment page 492*

### *Humanities page 493*

### *Media and communications page 493*

### *Recreation and sport page 493*

## Children and young people *page 493*

Mainly for welfare and welfare-related activities.

## Development, housing and employment *page 496*

## Disability *page 498*

## Disadvantaged people *page 500*

This includes people who are:

- ▮ Socially excluded
- ▮ Socially and economically disadvantaged
- ▮ Unemployed
- ▮ Homeless
- ▮ Offenders
- ▮ Educationally disadvantaged
- ▮ Victims of social/natural occurrences (including refugees and asylum seekers)

## Education and training *page 502*

## Environment and animals *page 505*

This includes:

- ▮ Agriculture and fishing
- ▮ Conservation
- ▮ Animal care
- ▮ Environment and education
- ▮ Transport
- ▮ Sustainable environment

As this is such a broad category, we have also included separate sections with sub-headings for 'Animals' and 'Environment'.

### *Animals page 506*

### *Environment page 506*

# Geographical index

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The following index aims to highlight when a grant-maker gives preference for, or has a special interest in, a particular geographical area. Before using the index, please note the following.

- 1) Before using this index please read the following information, as well as the introduction to the subject index on page 491. We must emphasise that this index:
  - (a) should not be used as a simple mailing list, and;
  - (b) is not a substitute for detailed research.
- 2) When you have used this index to identify relevant grant-makers, please read each entry carefully before making an application. Simply because a funder gives grants in your geographical area, it does not mean that they give to your type of work.
- 3) Most funders in this list are not restricted to one area – usually the geographical index indicates that the grant-maker gives some priority for the area(s) in question.

Each section is ordered alphabetically according to the name of the funder. The categories for indexes are as follows.

## **United Kingdom page 526**

### **England page 530**

We have divided England into the following ten categories:

North East *page 531*

North West *page 531*

Yorkshire and the Humber *page 531*

East Midlands *page 531*

West Midlands *page 531*

Eastern England *page 532*

South West *page 532*

South East *page 532*

Greater London *page 533*

Channel Islands *page 533*

Some grant-makers may be found in more than one category due to them providing grants in more than one area (for example, those with a preference for the north of England will appear under both North East and North West).

### **Wales page 533**

### **Scotland page 534**

### **Northern Ireland page 535**

### **Republic of Ireland page 535**

### **Europe page 535**

Overseas categories

### **Individual continents page 535**

### **Worldwide page 536**

The Middle East has been listed separately. Please note that most of the funders listed are primarily for the benefit of Jewish people and the advancement of the Jewish religion.

## THE GUIDE TO

# MAJOR TRUSTS

*The Guide to Major Trusts 2019/20* is the UK's definitive detailed guide to grant funding. It supplies information on over 1,000 of the largest UK funders which award a combined annual total of nearly £5.5 billion.

Now in its sixteenth edition, the directory continues to be practical and effective to use. Providing thorough background information on grant sources, it offers advice on how to apply and what funders are looking for.

The guide includes:

- Details of grant-makers' policies and practices
- Essential financial facts, including the annual total of grants awarded
- Clear descriptions of eligibility criteria for applicants
- Funders' contact details and how to make an application
- Social media accounts of each charity, where available

*The Guide to Major Trusts 2019/20* is not only a vital resource for all fundraisers and budget-holding staff, but a benchmarking tool for funders themselves.

*'The Guide to Major Trusts has become the cornerstone for our research and a great help in planning our approaches to new funders who might support our learning programmes.'*

**Edwina Roberts, Trusts and Foundations Manager, The Design Museum**

*'With over 9,000 trusts distributing charitable funding, identifying those sympathetic to our cause can be time consuming. The Guide to Major Trusts is well organised, easy to use and the comprehensive structure helps narrow down searches with confidence.'*

**Hannah Rudd, Trusts and Grants Fundraiser, Dorothy House Hospice Care**

*'Trust fundraising can be a bit of a minefield, especially working in a very small team with limited resources. This guide is a must-have tool, offering all the information you need in one place and saving valuable time.'*

**Alexandra Spurgeon, Supporter Relationship Manager, National Animal Welfare Trust**