

2021/22

THE GUIDE TO

NEW TRUSTS

10th edition

Abigail O'Loughlin
and Jessica Threlfall



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Published by the Directory of Social Change (Registered Charity
no. 800517 in England and Wales)

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

Tel: 020 4526 5995

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Print and digital editions first published 2011

Second editions 2013

Third editions 2014

Fourth editions 2015

Fifth editions 2016

Sixth editions 2017

Seventh editions 2018

Eighth editions 2019

Ninth editions 2020

Tenth editions 2021

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2016, 2017, 2018, 2019, 2020, 2021

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Print ISBN 978 1 78482 077 0

Digital ISBN 978 1 78482 078 7

British Library Cataloguing in Publication Data

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

Cover and text design by Kate Griffith

Typeset by Marlinzo Services, Frome

Printed and bound in the UK by Page Bros, Norwich

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Foreword

Welcome to the tenth edition of *The Guide to New Trusts*. I am honoured to be asked by the Directory of Social Change to write the foreword for this year's excellent publication, which remains an essential companion for fundraisers.

I launched the Steve Morgan Foundation (SMF) in 2001 to support charities that help people with physical or learning disabilities, the elderly and the socially disadvantaged in Merseyside, Cheshire and North Wales. These are the areas that have played a big part in my life and I wanted to give something back. SMF will turn 20 years old later this year, and since its inception I have personally gifted over £300 million to the foundation. This funding gives us an incredible base which is intended to secure our long-term future for decades to come.

Over our 20-year history we have supported thousands of charities, the largest of which is JDRF (Juvenile Diabetes Research Foundation). I am proud that SMF is the largest funder of type 1 diabetes research in JDRF's history, having donated a total of £7 million to date.

2020 was the biggest year in our history because of the COVID-19 pandemic, and I would like to think it was a case of 'cometh the hour, cometh the foundation'. In total we distributed a record-breaking £26 million – including £10 million from the Department for Digital, Culture, Media and Sport as part of the Community Match Challenge Fund – but it was the pace at which the money was distributed that was so crucial. We allocated £20 million to more than 125 charities in just 59 days. It made a massive

difference to some of the most vulnerable people in society when they needed the help most.

Regrettably, we can't approve every application. Last year alone we had requests for over £41 million in funding, and every bid is judged against a number of key criteria to determine if the applicant is a good fit: what type of organisation is applying; is it in our remit area and does it meet our criteria; are the applicant's accounts in order; does it have a good board of trustees; is the project well planned and needed; is it well presented; and so on.

COVID-19 has highlighted the importance of the voluntary sector in protecting some of the most vulnerable and isolated members of our community, yet it has never been harder for fundraisers to reach their goals as it is today. An impressive feature of charities' response to the pandemic has been how quickly some organisations have switched their services from a face-to-face model to an online-first format because of the restrictions around social distancing. That's commendable. Charities have to be equally agile in continuing to identify new sources of potential funding in these uncertain and uncharted times.

One important thing I've learned both in business and in life is that the marginal gains are often the difference between success and failure. In the competitive world of fundraising the latest research and intelligence compiled in *The Guide to New Trusts* can give you the edge.

Steve Morgan CBE

Businessman and philanthropist, Steve Morgan Foundation

Introduction

Welcome to the tenth edition of *The Guide to New Trusts*. In this book you will find 100 new grant-making charities which were registered with the Charity Commission for England and Wales (CCEW) and the Office of the Scottish Charity Regulator (OSCR) between April 2020 and March 2021. None of the charities have previously appeared in any of the funding guides published by the Directory of Social Change (DSC). In this edition, we continued our search for new grant-makers in Northern Ireland, but unfortunately none of the charities that had registered with the Charity Commission for Northern Ireland (CCNI) met the criteria set by this guide. We hope that future editions will include more Northern Irish charities as the CCNI continues to develop.

In order to make this guide as relevant as possible for our readers, the focus of our research was directed towards grant-makers with broad charitable purposes, that operate across a large geographical area. Consequently, many of the funders in this guide operate predominantly in Great Britain and are described as having ‘general charitable purposes’.

Attention was also given to charitable causes such as education, health and social welfare.

A small number of grant-makers listed in this guide focus on more specific purposes such as the arts, the environment, sport, and support for social inclusion and mobility. We have included these grant-makers in the guide because, although they concentrate on particular issues, these issues are beneficial to a sufficient proportion of the public to warrant inclusion. In theory, this increases the likelihood that readers will find their organisations to be eligible for funding from several of the listed grant-makers. Figure 1 outlines the distribution of causes to which these new funders contribute or will consider contributing to.

As figure 2 shows, even though the charities included in the guide cover a broad area of benefit, many of the head offices are based in Southern England, particularly in London. However, there are notably more head offices located in Northern England than in the previous edition.

Unfortunately, many of the issues we have encountered when preparing previous editions of this guide have

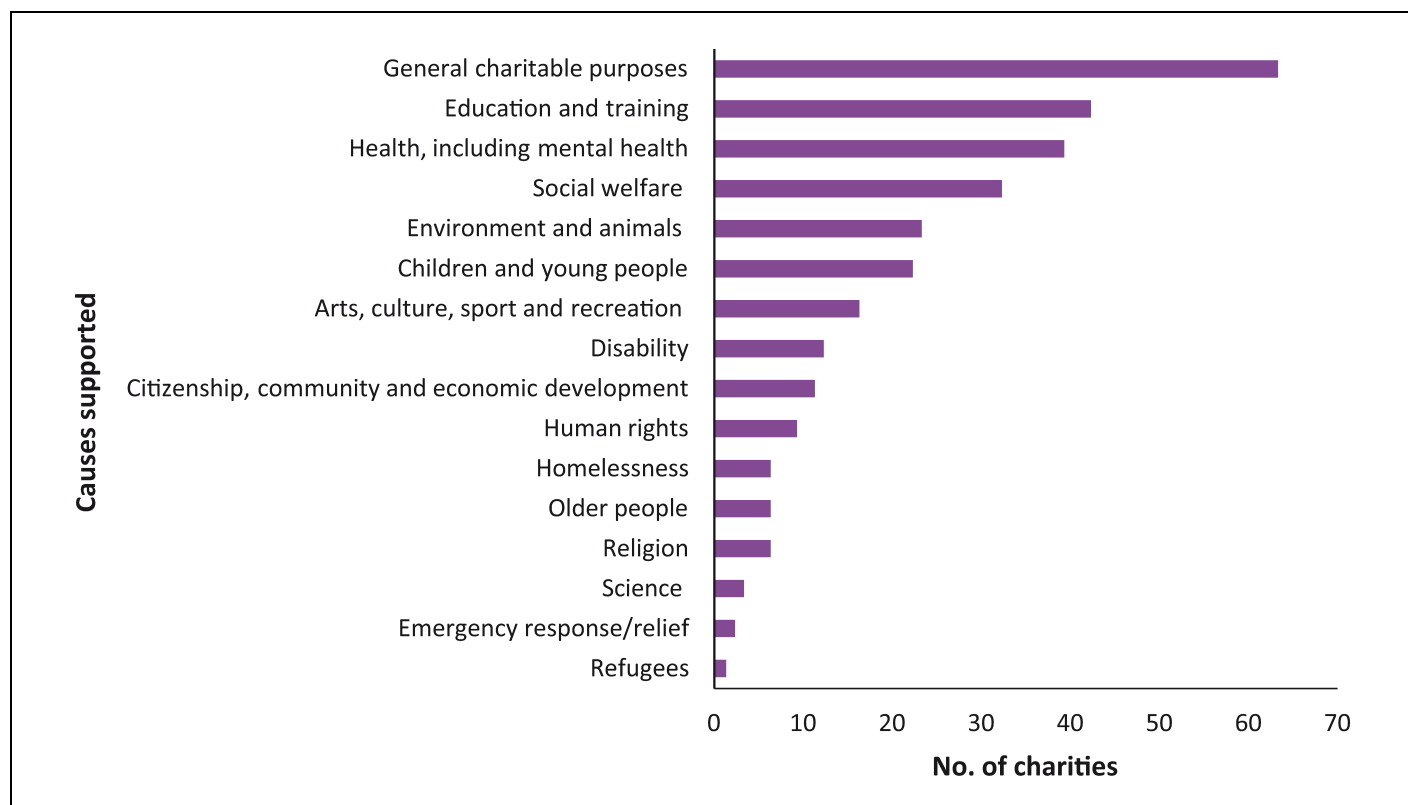


Figure 1: The causes supported by the funders in this guide. Note that many of these charities will consider supporting more than one cause.

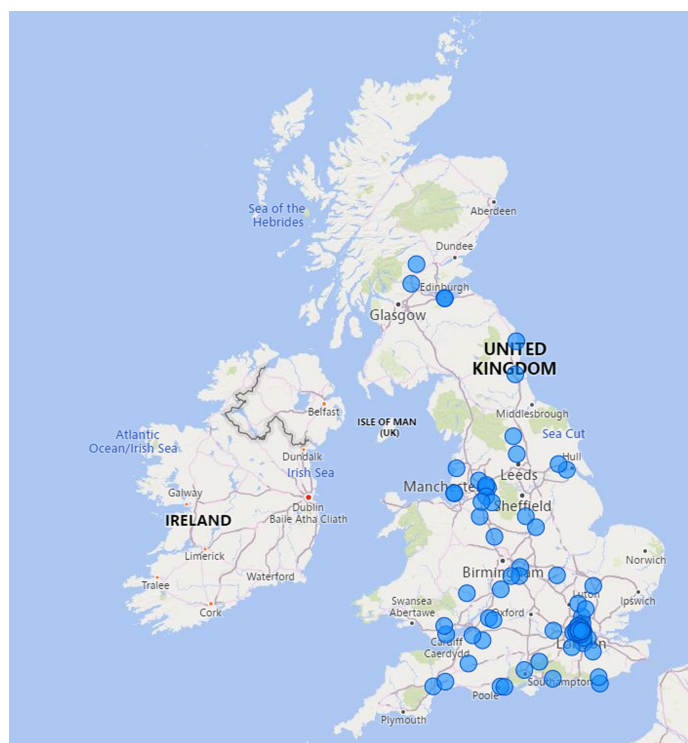


Figure 2: The locations of the charities featured in this guide.

continued to be present. The most notable of these is the lack of detailed information available for newly registered charities in general. Although the online registers of CCEW and OSCR are helpful in providing a platform from which we are able to launch deeper investigations elsewhere, we often found that this was in fact the final and only source of information. Where we were able to discover more information, we found that practices deviated somewhat from those activities listed on the regulators' registers. This may be because trustees have intentions of carrying out certain objectives or activities in the future, and so the registers' details are broader than those which are being undertaken at the present time.

In previous editions – and in line with DSC's calls for funders to be more transparent – we have stressed the value of online resources. Websites, and even social media accounts, used by a number of the charities listed in this guide allowed us to determine their relevance to our readers. From these sources, we were often able to tell: if the broader practices listed at the time of registration with CCEW or OSCR had since become more refined; if funders were actively making grants in support of charities; if an application process or specific eligibility criteria were already in place; and, more generally, how established the charity was. Where available, we have included the social media account information of the grant-makers listed, as these accounts can be an extra source of up-to-date information for fundraisers. It should be noted, however, that only a small number of funders included in this guide have a Twitter, Facebook or Instagram account, largely due to being newly established charities.

Of the grant-makers for which we were unable to acquire sufficient detail online, we were sometimes able to obtain further information directly. However, having only received replies from four of the funders featured, we would encourage new funders to use social media as a means to

provide extra details, such as intended focus areas and eligibility criteria. When funders do provide the correct information, ineligible applications can be reduced and thus valuable resources can be saved by both the applicant and the grant-maker.

In conclusion, the need for greater transparency in the grant-making sector continues. Although online resources have come some way in facilitating this, many grant-makers (for various reasons) do not make their grant-making practices easily accessible.

The grant-making charities in this book

The research for the tenth edition of this guide was carried out during the COVID-19 pandemic. In light of such an unprecedented social and economic context, we were pleased to see an almost equal number of charities registered with CCEW and OSCR as in the same period last year (April 2019–March 2020). This is a positive sign, which demonstrates a continuing appetite for individuals and companies to engage in philanthropy, and it is a testament to the resilience of the sector during such challenging times. This is also great news for fundraisers who may be in more need of support than ever.

During our research, we did encounter a small number of charities established to provide COVID-19-specific emergency or recovery relief; however, due to their narrow objects and time-sensitive funding objectives, such as grants for personal protective equipment or keyworker welfare initiatives, these funders were not included in the guide. One exception was made for The Moulding Foundation, established by the founder of the Hut Group, which does have COVID-19 relief in its objects but also aims to provide grants for a broad range of charitable purposes beyond the pandemic.

The grant-makers featured in this guide have been established by a wide range of individuals, families and companies. This list includes: entrepreneurs; authors; dentists; professors; students; MPs; a fashion brand; a British film/TV director; a Spanish royal connection and many more. The trend for companies establishing a grant-making charity, in order to funnel their corporate social responsibility activities, continues in this guide. Some of these companies also offer in-kind support and pro bono work in addition to financial donations. For example, in addition to making grants, The McCarthy & Stone Charitable Foundation actively facilitates volunteering and skill-sharing opportunities for its charity partners.

Poignantly, a number of charities have been formed in memory of friends or family members to support charitable causes based on the interests and values of that individual, and as a way to continue their legacy. One example is The Sasha Foundation that was established in memory of Sasha Love, who sadly took her own life in 2009 after a battle with bipolar disorder. The founders wish to keep her memory alive by supporting causes they believe Sasha would have chosen to support herself. In the UK, focus is given to supporting young people, particularly those who are suffering from mental health issues or who are confronting substance abuse. Sasha was a keen traveller, so the

foundation also supports education and healthcare projects in financially developing countries, particularly initiatives aimed at young women.

Some of the settlors and trustees of these new charities have past involvement in formalised charitable giving, while others are relatively new to it. Interestingly, from the charities listed in this guide, 57% of trustees are men and 43% are women, which is a more equal ratio than in the previous edition of this guide (60:40). It is also a more encouraging figure than the ratio found in a report commissioned by the Office for Civil Society and CCEW (CCEW, 2017), which found that men outnumber women trustees on boards by two to one.

Of the grant-makers we have included in this guide, 49% are registered with CCEW or OSCR as charitable incorporated organisations (CIOs), which indicates that this legal structure is proving popular. Along with the new charitable organisations listed here, these CIOs will have the capacity to develop into substantial charitable companies.

Of the charities listed in this guide, 5% are registered with OSCR; however, the majority of the grant-makers included have indicated that they intend to give to a large geographical area of benefit. No charities in this guide were registered with CCNI. While CCNI registers several new charities annually, the majority of charities registered this year had fairly selective focus areas, which were deemed not to be relevant to the readers of this guide. As we continue following the registration of new funders in Northern Ireland, we hope to feature more Northern Irish charities in future editions of this guide. It should also be noted that, although they have the potential to give more widely, many of the corporate charities listed in this edition tend to give priority to causes and organisations in the area in which their offices and operations are located.

Figure 1 shows the range of causes supported by the grant-makers we have listed in this guide. In comparison to previous editions, we see an increase in support for mental health issues, with some charities focusing on youth suicide prevention. Suicide is a leading cause of death among young people in the UK (Samaritans, 2019; ONS, 2020), and with the impact of COVID-19 on youth suicide rates yet to be fully understood, grant-makers featured in this guide, such as The Oli Leigh Trust, are providing much needed funding for suicide prevention and mental health initiatives. The number of grant-makers supporting vulnerable groups indicates how the charity sector, in many cases, plugs gaps left by government funding cuts. Local authorities are being forced to limit spending on much needed services as austerity measures and the financial pressures caused by the COVID-19 pandemic continue to affect sectors across the UK. However, the grant-makers included in this guide show how the spirit of philanthropy continues to support charities in meeting the vital needs of others.

Where are they now?

Lady Garden Foundation

Lady Garden Foundation was established in 2013 under the name The Grace Belgravia Foundation and was featured in the third edition of this guide (published in 2014). The foundation was established by Grace Belgravia, a private

women's club based in Belgravia. The foundation's co-founders include high-profile names such as television personality Tamara Beckwith and Chloe Delevingne, the eldest sister of models Cara and Poppy Delevingne.

At the time, we noted that the trust aimed to make grants to women's projects in the UK to support causes that benefit women and children, with a focus on health and wellbeing. We also mentioned that one of the first beneficiaries of the foundation was the research of Dr Susana Banerjee, a leading oncologist at The Royal Marsden Hospital, into women's gynaecological cancers.

Since then, the foundation has focused its activities on raising awareness and funding for gynaecological health. According to its 2019/20 accounts, the foundation has donated just over £1 million to The Royal Marsden Cancer Charity over the previous five years to fund gynaecological research and treatment at The Royal Marsden Hospital in continued support of Dr Banerjee's research.

Over the years, the foundation has run awareness campaigns and fundraising events featuring high-profile brands and socialites. For example, the foundation has collaborated with Topshop and Cult Beauty to produce fundraising merchandise for Gynaecological Cancer Awareness Month.

According to its website, the foundation will continue funding fellowships, clinical trials and cutting-edge research with the hope of revolutionising the treatment of gynaecological cancers.

Orange Tree Trust

Orange Tree Trust was established in 2018 and it featured in the ninth edition of this guide (published in 2020). At the time, its Charity Commission record stated that the trust planned to fund organisations and individuals to support the wellbeing, health (including mental health), education and other needs of refugees and people experiencing homelessness. It was also noted that the trust would support community development projects that gave a voice to marginalised groups, as well as research into medicine, social science, humanities and the arts.

Since then, the trust has continued to focus its support on these causes and so far has made grants totalling over £160,000 to five different organisations. It has also made grants totalling £2,000 to individuals in support of education. Some of the organisations that have received grants include the British Red Cross towards access to essential services for asylum seekers and refugees; Waterloo Community Counselling towards running costs; and Royal Court Theatre towards its Residencies Programme that helps young people to develop and share their work on stage. The trust also funded SE1 Productions towards the first draft of a film project called *Grenfell: A Tower in London*.

VINCI UK Foundation

VINCI UK Foundation was established in 2017 as the corporate charity of VINCI UK, a large construction company operating worldwide, following the establishment of several sister charities across Europe. It featured in the sixth edition of this guide (published in 2017).

At the time of writing, the foundation aimed to fight social exclusion by making grants to organisations in the UK and Republic of Ireland working in the areas of employment, housing, community development and improving mobility

INTRODUCTION

through access to transport. To date, the aims of the foundation have not changed.

Since it was established, the foundation has awarded grants totalling over £967,000 to 130 projects that promote social cohesion and fight exclusion. In 2020 the foundation awarded £201,800 to 33 projects for capital items. Examples of previous beneficiaries include Blind in Business, South Bucks Riding for the Disabled Association and St Rocco's Hospice.

The foundation supports small and medium-sized registered community interest or non-profit organisations that are located near the offices and worksites of VINCI companies. It also ensures that VINCI employees can get involved in the projects it supports. For example, 39 VINCI employees provided their time and skills to the foundation's beneficiaries in 2020.

Veronica and Lars Bane Foundation CIO

Veronica and Lars Bane Foundation CIO was established in 2019 by London-based Swedish philanthropists, Veronica and Lars Bane. The foundation was included in the ninth edition of this guide (published in 2020). At the time, the foundation's Charity Commission record stated that it would award grants to charities supporting projects related to education, health, human rights and the arts. Since then, it has continued to support these causes across the globe. According to its website, the foundation currently makes grants within four key areas: education and youth; livelihoods and human rights; health and wellbeing; and arts and culture.

Since it began its work in 2019, the foundation has awarded grants totalling over £90,000 and worked with at least ten different organisations within its four key areas. Among the organisations that received support is School Home Support, a UK-based charity that works with children and families to maximise educational opportunities and tackle issues affecting children's education. The foundation also worked with Bite Back 2030, a campaign encouraging healthy eating habits among young people in the UK. As well supporting charities in the UK, the foundation has funded a number of overseas organisations including Fistula Foundation, a charity that provides life-transforming surgery to women suffering with obstetric fistula across Africa and Asia.

The foundation's website states that it 'aims to support charities that make a positive difference in their fields'. At the time of writing, the foundation was not currently looking to accept unsolicited applications; however, please visit the website for more recent updates.

How to approach grant-making charities

As noted, few of the charities listed in the book had guidelines or application procedures in place at the time of writing (April 2020); however, some may have subsequently formalised and publicised this information.

Based on DSC's in-depth research into grant-making charities over many years, for publications such as *The Directory of Grant Making Trusts* and *The Guide to Major*

Trusts, here are some top tips to help you make your funding request:

- 1 If there are guidelines available, do read them carefully. It is worth reiterating that while few of the funders listed had guidelines in place – ones that they wished to make publicly available at least – these charities are new and may evolve quickly. Check to find out if there are any guidelines currently available before you proceed.
- 2 Do you meet the funder's eligibility criteria? If not, move on and find one where you do.
- 3 If the funder provides an application form, make sure that you complete it as fully as you can – incomplete application forms are likely to be the first to be filtered out.
- 4 If there is an online application form, prepare your proposal in a separate file beforehand, as some online forms cannot be saved to return to later.
- 5 Where no application form is available, be concise in your written letter of application and include your latest annual report and accounts.
- 6 Don't enclose any unnecessary materials at this stage of the application – most funders don't have time to read them and if they are interested in your proposal they will request this material at a later stage.
- 7 If the funder does not have specific guidelines, try to ensure that you are at least familiar with any geographical preference that it may have.
- 8 An initial telephone call or an email could save both you and the funder a lot of time and effort in the long run if your proposal is unsuitable, or the charity is currently oversubscribed. Bear in mind that many grant-makers don't have paid staff and rely on volunteers and/or trustees to deal with applications.
- 9 In general, application letters should be no more than two sides of A4, although some grant-makers advise on the length of application they will accept. Being clear and concise is the key to getting your application read.
- 10 Don't use jargon or specialist language that a layperson may not understand. Initially, you must be able to communicate what you want to achieve using straightforward language and concepts. (A more specialist funder such as one that funds medical research may require a more specialist explanation, although the principle of being concise still applies.)
- 11 The proposal should be written by someone who has a thorough understanding of your organisation and the project for which you are requesting funds. This person should be the named contact (in the event that a potential funder requires further information).
- 12 You must be able to demonstrate a need for the funding and be able to relate this directly to how it will help you serve your beneficiaries. Give an example of the change it will make to their lives.
- 13 Be realistic about how much you are asking for. Provide the grant-maker with a simple budget, including estimations of expected costs.
- 14 Don't rely on a positive response from a single funder – apply to as many as are relevant so that you can maximise your chances. Ensure your application is tailored towards the funding criteria of the individual

grant-maker and highlights how your project fits in with its aims.

- 15 If you don't receive a positive response from newly registered grant-makers, it might be worth noting those that are relevant and contacting them when they're more organised or defined.
- 16 Don't be disheartened if you don't receive a reply – on to the next application! Some funders acknowledge receipt of every application they receive, but most only contact successful applicants or those that they are interested in.

Although pressure on funding continues to be a concern for many charities, new sources are still emerging. We hope that some of those featured here can offer support to your organisation or project, or even commit to a long-term partnership.

If you have any comments, suggestions or feedback on this new guide, please contact DSC's Research Team at research@dsc.org.uk. We would be particularly interested in hearing about any success stories after approaching any of these charities, or if you discover new information about them which you would like to share.

All in the Research Team wish you the very best of luck.

Acknowledgements

We would like to thank The GoodCloud Foundation, The Kiln Family Trust, The Mistoria Group Foundation CIO and The Tweed Family Charitable Foundation for taking time to respond to our requests for further information.

We would like to give special thanks to the Steve Morgan Foundation for providing the foreword for this edition.

About the Directory of Social Change

At the Directory of Social Change (DSC), we believe that the world is made better by people coming together to serve their communities and each other. For us, an independent voluntary sector is at the heart of that social change and we exist to support charities, voluntary organisations and community groups in the work they do. Our role is to:

- **Provide practical information** on a range of topics from fundraising to project management in both our printed publications and e-books
- **Offer training** through public courses, events and in-house services
- **Research funders** and maintain a subscription database, *Funds Online*, with details on funding from grant-making charities, companies and government sources
- **Offer bespoke research** to voluntary sector organisations in order to evaluate projects, identify new opportunities and help make sense of existing data
- **Stimulate debate and campaign** on key issues that affect the voluntary sector, particularly to champion the concerns of smaller charities

We are a registered charity ourselves but we self-fund most of our work. We charge for services, but cross-subsidise those which charities particularly need and cannot easily afford.

Visit our website www.dsc.org.uk to see how we can help you to help others and have a look at www.fundsonline.org.uk to see how DSC could improve your fundraising. Alternatively, call our friendly team at **020 4526 5995** to chat about your needs or drop us a line at cs@dsc.org.uk.

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Grant-makers in alphabetical order

The Haydn Abbott Charitable Trust

 General charitable purposes

 England and Wales

CC number: 1193130

Trustees: James Abbott; Haydn Abbott; Sarah-Jane Butler; Jane Abbott.

Correspondent: The Trustees, 54 The Mount, Fetcham, Leatherhead KT22 9EA (tel: 01372 375572; email: haydn.abbott@outlook.com)

This trust was established in July 2020 in the name of Haydn Abbott, who is also a trustee. Haydn is chair of both European Loc Pool and the international children's charity Railway Children. Another of the trustees, Sarah-Jane Butler is the CEO and founder of Working Life Solutions, a multidisciplinary agency that focuses on employee wellbeing and retention. In 2019, Sarah-Jane was named as one of We Are The City's 'Rising Star Champions' for making a difference to the workplace for female employees. The trust's Charity Commission record states that it provides grants to other charities for general charitable purposes.


Applications


Contact the trust for more information.

Sources of information

Charity Commission record; European Loc Pool (website); Railway Children (website); Your Employee Wellbeing (website).

The Aldburys Charitable Foundation

 Children and young people, young artists, animal protection and welfare

 England and Wales

CC number: 1193558

Trustees: Gail Paterson; Stuart Paterson; Malcolm Paterson; Gemma Shaw.

Correspondent: The Trustees, White Ladies, Hook Hill, South Croydon CR2 0LA (tel: 020 8651 4487; email: mpatersoncr2@outlook.com)

The foundation was registered with the Charity Commission in February 2021. According to its Charity Commission record its objects are:

Making grants to other charities engaged in the relief of children in need by reason of ill-health, disability or financial hardship; helping young artists to develop their careers in musical theatre; protecting animals indigenous to the UK or providing a welfare environment for displaced domestic animals; and, occasionally, supporting major charities at the time of an international emergency.

Applications

Contact the foundation for more information.

Sources of information

Charity Commission record.

The Martin Ashley Charitable Foundation

 General charitable purposes

 England, Wales and overseas

CC number: 1190321

Trustees: Coutts & Co.; Richard Ashley; Janice Ashley.

Correspondent: The Trustees, c/o Coutts & Co., 1st Floor, Trinity Quay 1, Avon

Street, Bristol BS2 0PT (tel: 0345 304 2424)

This foundation was registered with the Charity Commission in July 2020. Its corporate trustee, Coutts & Co., is a private bank and wealth management company with several offices across England. The foundation's Charity Commission record states that it will make grants to organisations for general charitable purposes.

Applications

Contact the foundation for more information.

Sources of information

Charity Commission record.

The Pitt-Watson Barnes Foundation

 General charitable purposes

 England and Wales

CC number: 1189368

Trustees: Ursula Jane Barnes; James Barnes Pitt-Watson; David Pitt-Watson.

Correspondent: The Trustees, 23 Dartmouth Park Road, London NW5 1SU (tel: 020 7038 7247; email: foundation@pitt-watson.com)

This foundation was registered with the Charity Commission in May 2020. Its trustee and chair, David Pitt-Watson is a Scottish businessman, author and advocate in the field of responsible investment. Among other activities, David previously co-chaired the UN Environment Programme's Finance Initiative and, until 2017, he served as a trustee and treasurer at Oxfam. At present, David is an independent non-executive at KPMG and an advisor to Aviva Investors. According to the foundation's Charity Commission record, it can provide grants to

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THE GUIDE TO NEW TRUSTS

Finding new grant-makers is a time-consuming and intricate business. *The Guide to New Trusts* takes the legwork out of the process to help you beat a short path to new funders who might support your cause.

The grant-makers in this guide, all registered in 2020/21, were chosen for their wide geographical area of operation and the breadth of their giving criteria, making them relevant to a large number of charities.

At a glance, you can find essential, up-to-date information on:

- Grant-makers' aims and objectives
- The causes or types of project they do and do not fund
- Contact details, policies and application guidelines
- Any available social media accounts

This new edition offers a diverse range of opportunities, with grant-making charities established by individuals, families and companies. The list includes an interesting mix of entrepreneurs, authors, dentists, MPs, a fashion brand and a royal connection.

As the UK's leading guide to the latest grant-making charities, this is a vital resource for anyone looking for potential new funding for their organisation.

'By providing information on the most promising new trusts all in one place, *The Guide to New Trusts* saved our small fundraising team a lot of valuable time. It made applications quicker, which freed us up to work on other fundraising initiatives.'

Charlotte Stone, Fundraising and Communications Manager, Leeds Mencap

'An essential resource that keeps our pipeline healthy with fresh funding prospects and helps us to update our database with new trusts every year.'

Richard Grassby-Lewis, Grants Manager, Young Women's Trust