

2023/24

THE GUIDE TO

MAJOR TRUSTS

17th edition

Abigail O'Loughlin



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Foreword

Since Luke Fitzherbert produced the first ever edition of this guide to major grant-makers in 1986, the world of fundraising has changed dramatically, but this resource remains required reading as much today as it ever was.

As fundraisers, we know how important access to reliable and accurate information is to the success of our work. What *The Guide to Major Trusts* offers is all of this and more, enabling trust fundraisers to take their work to the next level – engaging high-value grant-making charities in a genuine and meaningful way which truly resonates with them. Now, more than ever, the most successful fundraising teams are engaging high-value supporters with a vision and inspiring them to be a partner, not just a donor, in delivering this change.

In 2019/20 we saw a marked increase in grant-making of 7.8%, leading to combined giving of £3.48 billion.¹ A huge amount! While the COVID-19 pandemic certainly disrupted charitable giving in many ways, we saw the funders of all sizes step in to address the funding crisis facing the sector. Grant-making during the pandemic was done at record speed, with fewer hoops to jump through and in greater collaboration with others. I am confident that this experience during a time of great need will

accelerate the transition towards funders and recipients working in partnership to deliver the greatest impact.

Partnership-building chimes with everything I believe in as a fundraiser. While creating well-written proposals remains a vital tool, we must all become relationship fundraisers – engaging funders, listening to them and crafting partnerships that deliver a far greater return to both the funder and recipient charity. Most importantly, fundraisers act as a conduit between those who seek to make a difference and donors who need support to fulfil their ambitions to change the world. If we can get these elements right, then we can ensure maximum impact for beneficiaries and drive the movement in fundraising away from being transactional towards becoming transformational.

This movement towards partnership is aided by the research and insight offered within this, now 17th, edition of *The Guide to Major Trusts* which is a key implement in your fundraising toolkit. Society faces some truly enormous challenges, and it has never been more important to bring funders and fundraisers together to create solutions to the problems we are all trying to address. I wish you every success on your journey.

Chris Jarrett
Director of Fundraising, RNIB

¹ Catherine Walker and Cathy Pharoah, *Foundation Giving Trends 2021. Top 300 foundation grant-makers* [PDF], The Association of Charitable Foundations, 2021, https://pearsfoundation.org.uk/wp-content/uploads/ACF179-Foundation-Giving-Trends-2021_Design_DigitalVersion_v3.pdf.

About DSC

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 our 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.

Introduction

Welcome to the 17th 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. We are delighted to return with this 17th edition after our research was interrupted by the COVID-19 pandemic in 2020/21.

Data collection

This guide contains over 1,000 of the UK's largest grant-makers taken from DSC's database, which contains details of over 8,000 charitable funders.

Over the course of our research, we looked at charity regulators' records, annual reports and accounts, websites and social media platforms. In this edition, the majority of the accounts we used were from 2020/21 (59.3%) and 2020 (26.1%). However, some charities' accounts were not available to view on the relevant charity regulator'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. This edition also includes a small number of charities that give in the UK but are not UK registered. In these cases, full financial information is often unavailable, and so we have relied on, for example, the charity's website or annual review to estimate its giving.

Criteria for inclusion

To be included in the guide, grant-makers must have the potential to award at least £250,000 in grants in the UK per year. Those in the guide with grant total under this threshold may have given over this amount in previous years or are likely to have the potential to exceed this amount in the near future. Some grant-makers' levels of giving may have been negatively impacted by the COVID-19 pandemic, and we have included such funders if they typically award over £250,000 per year. 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
- ▶ Give to a small number of beneficiaries each year
- ▶ Give to the same beneficiaries each year
- ▶ Give only to individuals

We have also excluded grant-makers that have ceased to exist or are being wound up with any remaining funds fully committed. Some grant-makers that are in the process of winding up or have wound up since the previous edition of this guide include Debenhams Foundation, The British Council for Prevention of Blindness, The Hillingdon Community Trust and The Vail Foundation.

In this edition, we have included over 160 grant-makers that have not been included in any previous editions of the guide. These are a mixture of grant-makers that have increased their grant-making capacity, newly registered charities and funders not previously known to us.

Findings

The 1,015 grant-makers included in this guide awarded a combined total of £7.33 billion in grants. A further £199.81 million was distributed by the 47 UK community foundations listed in the table on page 447. The amount distributed by the community foundations annually is typically around £100 million, but this increased in 2020/21 due to funding related to COVID-19.

Although the vast majority of funders featured in this guide are registered grant-making charities, there are also a number which are not. Some of the largest funders, such as The National Lottery Community Fund (giving £509.15 million in grants during 2020/21), The National Lottery Heritage Fund (£315.42 million in 2020/21), Arts Council England (£1.64 billion in 2020/21), Arts Council of Wales (£50.3 million in 2020/21), Arts Council of Northern Ireland (£11.65 million in 2019/20) and Creative Scotland (£139.52 million in 2020/21) are non-departmental public bodies. Excluding the funding given by these bodies, funding from grant-making charities amounted to £4.67 billion. If we look at the 769 grant-makers which appear in both this edition and the previous edition, there has been an overall increase in giving of around £1.36 billion, or 26.3%.

This guide includes a diverse range of grant-makers: from those supporting general charitable purposes (34.5% of the funders in this guide) and charities working in areas such

Top 25 grant-makers

(excluding public bodies, i.e. – The National Lottery Community Fund, arts councils and The National Lottery Heritage Fund)

		Areas of work	Total grants
1 (1)	The Wellcome Trust	Medical research, including research into mental health, infectious disease and the effects of climate change on health.	£759.5 million
2 (-)	Cancer Research UK	Cancer research.	£273.7 million
3 (-)	Hospice UK	Hospice and palliative care, and professional development for hospice staff.	£258.5 million
4 (-)	Arcadia Fund	Preserving endangered culture; protecting endangered nature; promoting open access to information.	£113.65 million
5 (7)	The Garfield Weston Foundation	Social welfare; young people; community; the arts; faith; the environment; education; health; museums and heritage.	£98.3 million
6 (3)	The Leverhulme Trust	Academic research.	£96.05 million
7 (-)	The Football Foundation	Grassroots and community football.	£69.9 million
8 (4)	Comic Relief	Tackling poverty and social injustice; children and young people; women and girls; community development; mental health.	£65.8 million
9 (-)	International Bible Students Association	Jehovah's Witnesses; overseas aid.	£60.29 million
10 (-)	The City Bridge Trust (Bridge House Estates)	Social welfare; the environment; mental health; homelessness; older people; children and young people; food poverty.	£57.4 million
11 (-)	Corra Foundation	Social welfare; children and young people; homelessness; families affected by substance abuse; international development (Zambia, Rwanda, Malawi and Pakistan).	£56.09 million
12 (15)	The British Academy for the Promotion of Historical Philosophical and Philological Studies (The British Academy)	Humanities and social sciences.	£54.4 million
13 (-)	Quadrature Climate Foundation	Climate change.	£54.06 million
14 (23)	Versus Arthritis	Research into all types of arthritis and musculoskeletal conditions.	£53.98 million
15 (8)	Esmée Fairbairn Foundation	Preservation of species and habitat; freshwater; sustainable and ethical food; injustice and structural inequality; young leaders and artists; community development; local economies; art and culture.	£53.53 million
16 (2)	British Heart Foundation (BHF)	Clinical and non-clinical cardiovascular research.	£51.9 million
17 (9)	The Gatsby Charitable Foundation	Plant science; neuroscience; STEM education; causes in Africa; public policy; the arts.	£50.47 million
18 (6)	BBC Children in Need	Disadvantaged children and young people (aged 18 and under).	£49.85 million
19 (-)	The Master Charitable Trust	General charitable purposes.	£43.53 million
20 (22)	Paul Hamlyn Foundation	Arts; education; young people; social justice.	£40.27 million
21 (16)	The Henry Smith Charity	Social welfare; community services and development; Christian projects; holiday grants for children.	£38.38 million
22 (-)	Reuben Foundation	Healthcare; education; community; culture.	£35.88 million
23 (14)	The Wolfson Foundation	Education; medicine and science; the arts; humanities; health; disability.	£35.72 million
24 (-)	The Wood Foundation	Education and economic development.	£35.5 million
25 (17)	Achisomoch Aid Company Limited	Orthodox Jewish causes and general charitable purposes.	£35.19 million
			Total £2.54 billion

as social welfare (59.8%), health (53.6%) or education (56%); to those specifically concentrating on so-called less popular causes, such as providing support for people with substance abuse (2.4%), violence/abuse survivors (3.9%) and LGBTQ+ (0.5%) groups.

The top 25 funders by total grants awarded gave a combined £2.54 billion, accounting for 35.3% of this edition's grant total. In the previous edition, the contributions made by the top 25 amounted to £1.86 billion. Just like in the previous edition, The Wellcome Trust remains the largest grant-maker in the guide (giving just over £759 million in 2020/21), and its annual giving can often have a significant effect on the overall grant total for our guides. For this edition, the cut-

off figure for inclusion in the top 25 is an annual grant total of £35.2 million, compared with £18.75 million in the previous edition. As is our usual practice, we have not included public bodies – The National Lottery Community Fund, The National Lottery Heritage Fund, the arts councils or Creative Scotland – in this table, as it is an opportunity to celebrate the work of those grant-makers that are registered charities.

There are 11 new entries in the top 25 grant-makers table this edition, most of which are financially large, established grant-makers. These new entries among the top 25 include:

- Hospice UK, which is a national charity that makes grants towards the provision of hospice and palliative care. Since the previous edition, Hospice UK's grant

total has increased by over £257 million, with it giving £258.5 million in 2020/21 compared to £830,000 in 2016/17. This was due to funding it received from the government to support hospices in response to the COVID-19 pandemic.

- ▶ The Football Foundation, which receives its funding from The Football Association (The FA), the Premier League and the Department for Digital, Culture, Media and Sport. The foundation helps to deliver a programme of new and improved community sports facilities in towns and cities across England. In recent years, the foundation has increased its grant-making, awarding £69.9 million 2020/21 compared to £10.5 million in 2016/17.
- ▶ Quadrature Climate Foundation, which was established by Quadrature Capital Ltd in 2019. The foundation's work focuses on decreasing global emissions of greenhouse gases. In 2020/21 it awarded grants totalling around £54 million to environmental organisations, which was an increase from the previous year (2019/20), during which it awarded £21.4 million to the same causes.

COVID-19 impact and response

In the wake of the COVID-19 pandemic, many grant-makers have had to adapt and respond to challenges facing the charity sector. During our research, we found many funders noted a change, often negative, in income levels as a result of the pandemic. This was caused by several factors including:

- ▶ Cancelled fundraising events
- ▶ Lockdowns and restrictions resulting in less income from retail stores/property companies (for charities that rely on funding from such sources)
- ▶ Lower investment income

For example, Kidney Research UK noted a significant impact on income due to cancelled events and supporters donating less. As a result, the charity had to furlough employees and temporarily pause the funding of new research, focusing on a small number of COVID-19-related projects instead. Similarly, The LankellyChase Foundation saw a decline in investment income during 2020/21. The foundation noted this was primarily due to the fact that many companies in its portfolio significantly reduced or even cancelled their dividends during the 2021 financial year, in response to the pandemic.

On the other hand, some charities saw no impact or even an increase in their income and expenditure during the pandemic. This was largely due to higher private donations or government funding. For example, Bridgepoint Charitable Trust launched a £3.3 million COVID-19 Relief Fund that was funded by board member salary contributions, meaning its income was not affected. The Corra Foundation received £34 million from the Scottish Government's COVID-19 emergency funding, which meant that its income increased.

The overall grant total in this edition was £1.86 billion higher than in the previous edition, which was due to the arts councils, Hospice UK and other organisations

receiving government funding to distribute during the COVID-19 pandemic.

Impact on applications

As well as changes to income, some charities also noticed a reduction in the number of applications received compared to previous years. For example, William Harding's Charity reported it received fewer applications than usual due to the closure of schools and educational organisations. This, in turn, resulted in lower expenditure on grants.

Grant-makers' response

In some cases, to help with the impact of the COVID-19 pandemic, charities launched emergency grant programmes to support communities and organisations in need. For example, The Theatres Trust Charitable Fund launched a COVID-19 Support Fund to help theatres manage during the lockdowns. It also established the Theatre Reopening Fund, through which it awarded funds to theatres to enable them to open safely when restrictions eased. Other charities adapted their existing grant programmes to focus on COVID-19 support or provided greater flexibility to existing grantees. According to our research, 344 (33.9%) of the charities in this guide awarded grants specifically for COVID-19-related needs. In contrast, some charities were forced to temporarily postpone their programmes or reduce the level of support they could provide.

Social media

Over the past two decades or so, organisations within the charity sector have become increasingly adept at exploiting the opportunities offered by digital technologies and the web. Of the grant-makers listed in this edition of the guide, 64.2% have their own website (compared to 59.5% in the previous edition). Many of these websites are used to accept and process applications, as well as provide essential information about grant programmes, including deadlines, eligibility criteria and application procedures.

Apart from providing a simpler, quicker and less costly means by which funding applications can be submitted, digital technologies also offer the possibility for grant-makers to advertise their grant programmes and promote the impact of their funding to a much wider audience than would otherwise be possible. While many grant-makers choose to do this using their own website, a growing number of funders are also utilising social media platforms such as Facebook, Instagram and Twitter. Of the funders listed in this edition of the guide, 22.8% have a Twitter profile (compared to 15% in the previous edition), over 17% (11% in the previous edition) have a Facebook page, and nearly 10% (3.6% in the previous edition) have an Instagram account. Often these social media accounts are used to promote and celebrate the important work of the funder's beneficiaries but are also, on occasion, used to share information about funding opportunities. As such, following grant-makers' social media activities can provide fundraisers with a simple and convenient means of keeping

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up to date with the latest news and updates from multiple funders at once.

Given the growing use of social media by grant-makers, we included details of grant-maker's Twitter, Facebook and Instagram accounts for the first time in the 16th edition of *The Guide to Major Trusts*. This information continues to be featured in this edition at the top of each record alongside the grant-maker's contact details and web address.

Applying for grants

Writing and assessing grant applications can be an incredibly time-consuming process, with every unsuccessful application representing a significant waste of resources for both the charity and funder alike. Despite this, each year thousands of hours continue to be spent by applicants and grant-makers completing and processing applications that stand little or no chance of being successful. Given the limited resources available to both, making the grant-making process as efficient as possible – by reducing the number of ineligible applications submitted to funders – should be in the interests of everyone.

On the one hand, of course, it is the responsibility of the charities themselves to ensure that the time they dedicate to fundraising is used as efficiently and effectively as possible. Publications such as this one, as well as online resources such as DSC's funding website, can help charities to identify grant-makers that may be relevant to their causes. However, it is also important that charities carefully tailor their applications for each funder and only submit applications which they genuinely believe to have a good chance of success.

On the other hand, DSC has long argued that it is also the responsibility of the grant-makers to help to minimise the administrative burden of the grant-making process, by providing clear guidance on the types of project that they would be willing to fund and making their application processes as simple and proportionate as possible. This can be especially important in situations where grant programmes are likely to be competitive or likely to receive a high number of applications, which is frequently the case with major grant-makers featured in this guide.

From a practical perspective, there are a number of things that grant-makers can do to help reduce the number of ineligible applications they receive. Firstly, and most simply, grant-makers may choose to provide applicants with a simple list of eligibility criteria, outlining their geographical area of benefit and focus, as well as details about the types of organisation or activities that they will or will not fund. By being open and honest about their funding preferences, grant-makers can help prospective applicants to make a more informed judgement about their chances of success and determine whether completing an application would be a worthwhile use of their time.

Technically savvy grant-makers may choose to take this concept one stage further and provide applicants with the option of testing their eligibility using an interactive 'eligibility checker'. Usually presented in the form of an online questionnaire, this option enables applicants to

determine their suitability to apply for funding in just a few clicks. In some cases, eligibility checkers may also be used to restrict access to application forms to only those organisations that have met the grant-maker's criteria.

Next, a less technical (but no less effective) alternative adopted by many grant-makers is to invite prospective applicants to contact them by phone or email prior to completing a full application. Often a short email exchange or brief telephone conversation is enough for applicants to determine whether their project fits within the priorities of the funder, which can help them avoid wasting time writing applications that are unlikely to be accepted.

Finally, some grant-makers may choose to use a two-stage application process, whereby applicants are initially required to submit a much shorter version of the application form before completing a full application if invited to do so. By using the much simpler first stage of the application process to create a shortlist, grant-makers can help to minimise the time wasted by unsuccessful applicants. This option is particularly useful for grant-makers that require applicants to complete lengthy or detailed applications, such as those that fund medical or scientific research.

During the process of researching this edition of *The Guide to Major Trusts*, DSC collected data about the information that grant-makers provide to applicants as well as the nature of their application processes. Analysis of the data collected reveals that, of the funders accepting unsolicited applications, around 24.7% had an online application form, 13% welcomed contact from applicants prior to the submission of a formal application form, around 6.6% of funders used a multi-stage application process, and 4.6% offered applicants the option to check their eligibility using an online eligibility checker.

It is worth noting that many grant-makers openly invite applications from a wide range of charities and often choose to place no restrictions on the types of project that they would be willing to fund. This means they don't require such a rigorous application process to sift out unsuitable applications. Furthermore, it should also be acknowledged that some of these solutions may only be appropriate for larger grant-makers with the staff, resources and technical expertise required to respond to enquiries, administer two-stage application processes or create online questionnaires. Conversely, many smaller grant-makers often rely on volunteers and part-time staff and so may not have the resources needed to undertake these initiatives.

While it is not possible to draw any general conclusions or make recommendations for how UK grant-making practice may be improved without additional research, these figures provide an interesting insight into the current approach of major UK grant-makers to the processing of applications.

DSC's policy and campaigning

DSC's policy and campaigning activities aim to make the UK a better environment for charities to thrive and help their beneficiaries. In these activities, we act independently

in the role of a concerned citizen to champion the needs of the voluntary sector. We ask critical questions, challenge the prevailing view and try to promote debate on issues we consider to be important.

Grants for Good campaign

Grant-funding from government is essential for the work of many charities and voluntary groups. Grants can empower organisations to identify and solve problems, as well as addressing needs in a way that is centred on beneficiaries.

Grants for Good is a campaign that aims to tackle the decline in grant-funding from the public sector, which has taken place over many years. The campaign is currently trying to establish the level of grant-making from local authorities and to produce guidance for local commissioners, aiming to demystify grants and encourage their use.

Grants have many advantages over restrictive and inflexible contracts, particularly for supporting smaller voluntary organisations, and can deliver better outcomes for beneficiaries. Grants are effective for:

- ▶ Adapting to change
- ▶ Empowering people
- ▶ Investing locally
- ▶ Nurturing innovation
- ▶ Saving time, effort and resources
- ▶ Supporting community
- ▶ Sustaining services

Many of the grant-making charities in this guide will also have been affected by the decline in government grants and the shift towards contracts.

Despite attempts to reform commissioning and procurement, smaller charities are often unable to compete for larger government contracts or to find relevant funds to support their area of work – this, in turn, increases the pressure upon charitable grant-makers. With fewer and fewer grants available from both local and national government, charities that previously relied on this source of funding, or charities working in areas that have experienced large cuts in government expenditure (such as the arts), will have to turn to other sources for support, such as the grant-makers in this guide.

The Grants for Good campaign needs the support of charities and voluntary organisations so that we can influence commissioners and politicians, and champion the benefits of grants. There are a number of ways in which you can get involved: visit www.dsc.org.uk/grantsforgood for more information.

DSC's Big Lottery Refund campaign

The National Lottery occupies a unique place in the grant-making world. While the various distributors of National Lottery funds are statutory bodies which distribute public money (technically speaking), their activities, aims and beneficiaries have much in common with grant-making charities. Many of the readers of this guide will be familiar with the Big Lottery Fund, now known as The National Lottery Community Fund, which distributes funding for projects that benefit communities across the UK. The fund's grants, many of which are for less than £10,000,

support charities and voluntary organisations often with local, grassroots projects.

The Big Lottery Refund campaign was created in 2007, in response to a government decision to divert a huge amount of the Big Lottery Fund money (£675 million in total) to put towards the infrastructure for the London 2012 Olympic Games. In total, £425 million of this, which should have been used to support charities and communities, is still owed to the Big Lottery Fund (now The National Lottery Community Fund). An agreement was made between the government and the London Legacy Development Corporation to pay this money back following the sales of the Olympic assets. However, both the current and previous governments have stated that this now will not happen until the 2020s or even 2030s.

We think that this situation is unacceptable. Our campaign aims to get the government to pay the money back immediately. Giving back this money now would make a huge difference to organisations and the individuals they serve, at a time when so many people are in need of support. Find out more and sign up at www.dsc.org.uk/big-lottery-refund or follow us on twitter @BigLotteryRfnd for updates.

Acknowledgements








The research for this book has been conducted as carefully as possible. Many thanks to those who have made this easier, especially the funders themselves through their websites, their staff who provided additional information and the trustees and others who have helped us. Further thanks go to the Charity Commission for England and Wales, the Office of the Scottish Charity Regulator and the Charity Commission for Northern Ireland for making the annual reports and accounts available online.

We would also like to thank Chris Jarrett, Director of Fundraising at RNIB, for contributing the foreword to this edition.

Disclaimer

We are aware that some of this information may be incomplete or will become out of date. We are equally sure we will have missed some relevant charities. If you come across any omissions or mistakes, or if you have any suggestions for future editions of this book, do let us know. We can be contacted by either phone on 020 4526 5995 or email at cs@dsc.org.uk.

A typical entry

<p>The Fictitious Charity</p> <p> Social welfare; education; health</p> <p> UK, with some preference for New Town</p> <p> £1.3 million (2020/21)</p> <p>CC number: 123456</p> <p>Correspondent: Ann Freeman, Appeals Secretary, The Old Barn, New Town ZC48 2QQ</p> <p>Trustees: Eva Appiah; Rina Khan; Lorraine Murphy.</p> <p> www.fictitious.org.uk</p> <p> facebook.com/fictitious</p> <p> @fictitious</p> <p> @fictitious</p> <p>General information</p> <p>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 2020/21 stated that 'specific projects are preferred to general running costs'.</p> <p>Financial information</p> <table> <tr> <td>Year end</td><td>31/03/2021</td></tr> <tr> <td>Income</td><td>£1,500,000</td></tr> <tr> <td>Assets</td><td>£20,300,000</td></tr> <tr> <td>Grants to organisations</td><td>£1,300,000</td></tr> <tr> <td>No. of grants</td><td>127</td></tr> </table> <p>Further financial information</p> <p>In 2020/21, grants awarded to organisations were broken down as follows: social welfare (£900,000); health (£300,000); education (£100,000).</p> <p>Beneficiaries included: Homeless 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).</p> <p>Exclusions</p> <p>No grants are made to non-registered charities, individuals or religious organisations.</p> <p>Applications</p> <p>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.</p> <p>Sources of information</p> <p>Accounts; annual report; Charity Commission record; funder's website.</p>	Year end	31/03/2021	Income	£1,500,000	Assets	£20,300,000	Grants to organisations	£1,300,000	No. of grants	127	<ul style="list-style-type: none"> • Name of the charity • Main focus areas: what the charity funds in practice. • Geographical area of grant-making: including where the funder can legally give and where it gives in practice. • Grant total: total amount given to organisations in the most recent financial year available. • Registered charity number • Correspondent and contact details: including telephone, email, website and social media details if available. • Trustees • General information: a summary of the funder's policies. • Financial information: the charity's financial year end, annual income, assets, and the total amount and number of grants awarded to organisations, where available. • Further financial information: additional information, such as the breakdown of grants. • Beneficiaries included: a list of typical beneficiaries supported by the charity. 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.
Year end	31/03/2021										
Income	£1,500,000										
Assets	£20,300,000										
Grants to organisations	£1,300,000										
No. of grants	127										

How to use this guide

The funders in this guide are listed alphabetically and the indexes are at the back of the book. There are subject and geographical indexes, which will help you to identify the funders working in your field and area.

Read each funder's entry carefully before deciding to apply. Sometimes, a funder's interest in your field will be very specific or it may have strict guidelines for how to make an application. When you have drawn up a shortlist of funders which your organisation may be eligible to apply to, we recommend that you prioritise them in order of the amount of information they have available. We think it's better to apply to a smaller number of grant-makers for which more information is available, as this means you can properly tailor your application and have a better chance of success.

It is particularly important to show awareness of all the information available from the funder, to acquire up-to-date guidelines where possible and to target your applications with respect to each funder's published wishes where such information exists. Fortunately, there are more funders with an online presence than ever before, so it's becoming increasingly easy for them to communicate their priorities and policies.

Remember that when funders maintain specific guidelines or state that they do not accept unsolicited applications, they are not just being fussy – they are trying to save themselves and applicants precious time and resources. Inappropriate and ill-considered approaches, especially those that show you have not read the published guidelines, can annoy funders and even result in damaging your organisation's reputation. Of course, many funders continue to publish little or no additional material and the only information we have to rely on is that which is available from the relevant charity regulator. Unfortunately, this may result in a waste of your time and the funder's if they reject an application that they deem to be ineligible.

Notes on the entries

These notes complement 'A typical entry' on page xvi and explain how the entries are put together.

The main areas of funding

These categories have been chosen by DSC researchers from an analysis of the areas of work supported by the funder. They are indicative rather than definitive and are useful in a preliminary trawl through the guide. They are no substitute for a close reading of each entry.

Beneficial area

This is the area or areas within which the funder operates, either legally or as a matter of policy or practice. When a funder with a UK-wide remit shows an interest in a particular locality, this is noted. While the information usually comes from the funder itself, it may also arise from a pattern of grant-making identified by DSC researchers.

Grant total and financial year

The most up-to-date financial information available is given here. For the majority of funders in this guide, we were able to obtain financial information from the 2020 financial year onwards. For a small number of entries, we had to use financial information from an earlier year, as this was the latest available at the time of writing. In the majority of cases, this was because the grant-maker's annual report and accounts were not yet due at the relevant charity regulator.

The correspondent

This is the lead contact. Sometimes this is a solicitor or an accountant handling the affairs of a grant-making charity solely on a 'post box' basis, and in other cases it is the relevant department at an organisation. Other useful administrative contacts may also be given in the 'Applications' section or within the main body of text.

The main body of the entry

A summary of the funder's grant-making activities and eligibility criteria. Policy notes and guidelines for applicants, where available, are normally listed in detail, as given by the funder. However, there are cases in which these are so lengthy or subject to change that some abridgement has had to be undertaken and, where appropriate, we direct readers to the funder's website, where extensive or up-to-date information is available. More grant-makers now analyse the distribution of their funding in their annual reports and, where available, this material will also usually be quoted in full. Some analysis has also been carried out by the authors based on grants lists accompanying the accounts.

Exclusions

Where information on exclusions is available, this section notes things that the funder will not or cannot support. In most cases, this has been gathered from the information on websites or in annual reports, although, occasionally, the detail has been communicated directly to DSC by the funders themselves.

Applications

In this section we explain how to make an application to the funder. You will notice that there are some grant-makers that do not accept unsolicited applications – we include these funders to both promote transparency in grant-giving and help save the time and resources of organisations that may otherwise apply in vain for funding.

Sources of information

This section notes the sources of information we have used for the entries. If there is a website, this is usually the best starting point for information, but we also use the charity regulators' (the Charity Commission for England and Wales, the Office of the Scottish Charity Regulator and the Charity Commission for Northern Ireland) registers of charities extensively.

How to apply to a funder

If you are looking for some detailed help in this area, DSC offers training for new and established fundraisers (see www.dsc.org.uk/training) and publishes books that can help, including *Grants Fundraising* and *The Complete Fundraising Handbook*. However, there is no need to be daunted by the challenge of making effective applications. If your charity's work is in demand – and of a kind supported by the funder in question – a very simple letter (of one uncrowded A4 page or less, backed by a clear annual report and set of accounts) will probably do 90% of everything that can be done.

If there is an application form and/or detailed application requirements, simply follow them.

1) Select the right grant-makers to approach

If they fund organisations or work like yours, and you genuinely fit within any guidelines they publish, put them on your list.

2) Call them

If the entry makes this sound sensible, ring the grant-maker to check that the guidelines in this guide still apply and that the kind of application you are considering is appropriate.

3) Send in an application

Unless the grant-maker has an application form, we suggest that the main part of this should be a letter that fits easily on one side of an A4 sheet of paper (back-up materials such as a formal proposal may be necessary for a big or complex project but are usually, in our view, secondary). We suggest that the letter contains the following points:

- ▶ **A summary sentence such as:** 'We would like to reward our hard-working and valued volunteers with a training programme to develop their skills, and I am writing to you requesting a contribution of £5,000.'
- ▶ **The problem the work will address:** This should normally be the beneficiaries' problem, not your charity's problem: 'Mothers of children with learning disabilities in our area get very little help from the statutory services in coping with their children's day-to-day needs. We are aware of the very helpful support you have given to similar projects and feel that the purpose of the project complements your charity's ethos and aims.'
- ▶ **What you are going to do about this:** 'Our volunteers (who have been in the same situations themselves) support and help our beneficiaries but need and want better training, especially on home safety. Our beneficiaries, as you'll be aware, often struggle with meeting the needs of their children. This award would develop our volunteers' skills and, as a result, their experience and knowledge. This will then help us provide significantly better, more qualified support to help our beneficiaries more effectively.'
- ▶ **Details of the work:** 'We want to commission an expert from our sister charity Dean Cambridge Foundation to develop and test suitable training materials that we will be able to use.'
- ▶ **Information about your charity:** 'We attach one of our general leaflets explaining what we do, a copy of our latest annual report and accounts, and a copy of the quote received from the Dean Cambridge Foundation to supply the initial training which we can then develop (with funding we hope to be awarded from Awards for All).'
- ▶ **Repeat the request:** 'We are all very keen to see this project happen and hope that you will be able to help us.'

And that is all. Keep the style simple and informal. If posting your letter rather than sending it via email, handwrite the date, salutation and signature. A charity is not a business and is usually not impressed by applicants trying to sound like one. The best letter comes from someone who understands the project and is going to be

involved with it. In this way, they can speak authoritatively and with enthusiasm should someone from the funder call for more information. Making the letter longer will often reduce rather than increase its impact, but attaching compelling material is fine.

A letter of endorsement might also be nice – your local GP practice saying your work is wonderful, for example.

Appearance matters. It is a great help if you have a good-quality letterhead on something better than photocopy paper if you are posting your request, and if your report and accounts and literature are of appropriately high quality for your kind of organisation. However, you don't want to give the impression that your charity spends unnecessary money on expensive materials rather than on carrying out its work.


Good luck!


A typical entry


<p>The Fictitious Charity</p> <p> Social welfare; education; health</p> <p> UK, with some preference for New Town</p> <p> £1.3 million (2020/21)</p> <p>CC number: 123456</p> <p>Correspondent: Ann Freeman, Appeals Secretary, The Old Barn, New Town ZC48 2QQ</p> <p>Trustees: Eva Appiah; Rina Khan; Lorraine Murphy.</p> <p> www.fictitious.org.uk</p> <p> facebook.com/fictitious</p> <p> @fictitious</p> <p> @fictitious</p> <p>General information</p> <p>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 2020/21 stated that 'specific projects are preferred to general running costs'.</p> <p>Financial information</p> <table> <tr> <td>Year end</td><td>31/03/2021</td></tr> <tr> <td>Income</td><td>£1,500,000</td></tr> <tr> <td>Assets</td><td>£20,300,000</td></tr> <tr> <td>Grants to organisations</td><td>£1,300,000</td></tr> <tr> <td>No. of grants</td><td>127</td></tr> </table> <p>Further financial information</p> <p>In 2020/21, grants awarded to organisations were broken down as follows: social welfare (£900,000); health (£300,000); education (£100,000).</p> <p>Beneficiaries included: Homeless 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).</p> <p>Exclusions</p> <p>No grants are made to non-registered charities, individuals or religious organisations.</p> <p>Applications</p> <p>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.</p> <p>Sources of information</p> <p>Accounts; annual report; Charity Commission record; funder's website.</p>	Year end	31/03/2021	Income	£1,500,000	Assets	£20,300,000	Grants to organisations	£1,300,000	No. of grants	127	<ul style="list-style-type: none"> • Name of the charity • Main focus areas: what the charity funds in practice. • Geographical area of grant-making: including where the funder can legally give and where it gives in practice. • Grant total: total amount given to organisations in the most recent financial year available. • Registered charity number • Correspondent and contact details: including telephone, email, website and social media details if available. • Trustees • General information: a summary of the funder's policies. • Financial information: the charity's financial year end, annual income, assets, and the total amount and number of grants awarded to organisations, where available. • Further financial information: additional information, such as the breakdown of grants. • Beneficiaries included: a list of typical beneficiaries supported by the charity. 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.
Year end	31/03/2021										
Income	£1,500,000										
Assets	£20,300,000										
Grants to organisations	£1,300,000										
No. of grants	127										

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

 £504,300 (2019/20)

CC number: 802749

Correspondent: Nils Stronach, Head of Grant Practice and Programmes, c/o Community Foundation, Philanthropy House, Woodbine Road, Gosforth, Newcastle upon Tyne, Tyne and Wear NE3 1DD (tel: 0191 222 0945; email: ns@communityfoundation.org.uk)

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

 www.communityfoundation.org.uk/group_grant/the-1989-willan-charitable-trust

General information

The trust was established in 1989 by the Willan family out of funds derived from a shipping business in the north-east of England. The trust supports general charitable purposes by making grants to registered charities, exempted and excepted organisations whose activities benefit residents of Tyne and Wear, Northumberland, County Durham and Teesside. Preference is given to local registered charities with expenditure of less than £1 million. Applications from national charities are welcomed, but only for projects that solely benefit the North East.

The trust's 2019/20 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 that are

active in Tyne and Wear and its immediate surroundings. 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 weigh their support towards local charitable institutions rather than national or international ones [...]

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

Grants are given for core costs or project costs, and awards typically range from £750 to £10,000, although there is no maximum or minimum grant. Projects where the grant will represent a significant contribution to the overall cost are prioritised. Grants are usually for a maximum of one year. The trust can also provide in-kind support, in the form of premises for charitable organisations.

Some examples of projects the trust will support include:

- ▶ Projects that meet the needs of communities experiencing high levels of deprivation
- ▶ Services for young people that address educational needs or offer diversion from crime and anti-social behaviour
- ▶ Self-help initiatives
- ▶ Art projects that help tackle deprivation
- ▶ The work of youth organisations, in particular, the Sea Cadets, Scouts, Guides and other uniformed groups (grants of up to £1,500)
- ▶ Projects that draw on the region's rich maritime tradition

- ▶ Gap year voluntary work through the Project Trust (grants of up to £500 for expenses)

The Community Foundation for Tyne and Wear and Northumberland (Charity Commission no. 700510) provides administrative support to the trust's grant-making in the North East region, receiving and vetting applications for the trustees. A list of examples of projects the trust might fund is available on the community foundation's website.

Financial information

Year end	30/09/2020
Income	£505,000
Assets	£21,170,000
Grants to organisations	£504,300
No. of grants	75

Further financial information

Grants were broken down as follows:

Improving health	29	£200,900
Participation in community life	21	£159,400
Building children's future	21	£130,600
Enjoying later life	4	£13,500
£10,001 and above	1	£25,000
£5,001–£10,000	36	£334,800
£1,000–£5,000	38	£144,500

Beneficiaries included: A full list of grants awarded is available on request from the Community Foundation for Tyne and Wear and Northumberland.

Exclusions

According to the community foundation's website, the trust will not provide funding for the following, unless the project primarily addresses local deprivation:

- ▶ Trips abroad
- ▶ Individuals, except Project Trust (gap year voluntary work) applications from residents of the beneficial area
- ▶ Projects focused on heritage and the environment, scientific and/or medical research

Applicants that do not provide feedback on previous awards will not generally be considered for further funding. The

Subject index

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.fundsonline.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 grant-makers' 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) Grant-makers' 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 the 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 and they waste funders' as well as your resources.

The categories are as follows.

Arts, culture, sport and recreation *page 454*

A very diverse category including:

- ▶ Performing, written and visual arts
- ▶ Crafts
- ▶ Heritage
- ▶ Buildings and monuments
- ▶ Architecture
- ▶ Archiving
- ▶ Sports and recreation

As this is a varied category, we have included two more specific sub-headings.

Arts and culture page 454

Sports and recreation page 457

Children and young people *page 458*

Community services and development *page 461*

This category includes:

- ▶ Citizenship
- ▶ Rural communities
- ▶ Community transport
- ▶ Community enterprise and social entrepreneurship
- ▶ Employment advice
- ▶ Legal advice
- ▶ Money and debt advice
- ▶ Rehabilitation

Again, as this is such a broad category, we have included a separate sub-section for advice and counselling services.

Advice and counselling services page 463

Disability *page 464*

Education and training *page 466*

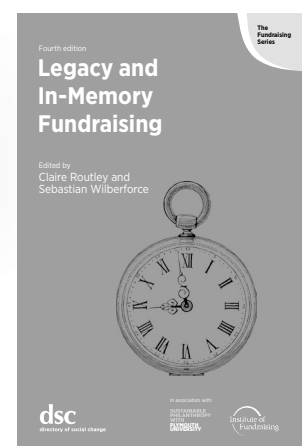
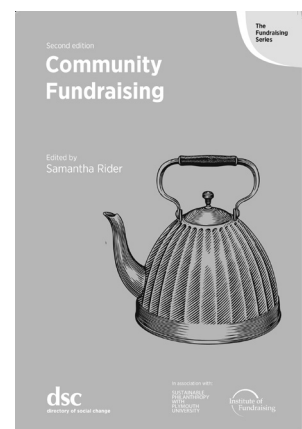
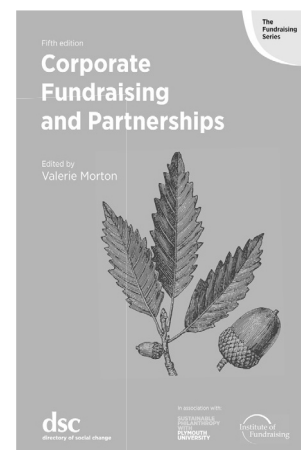
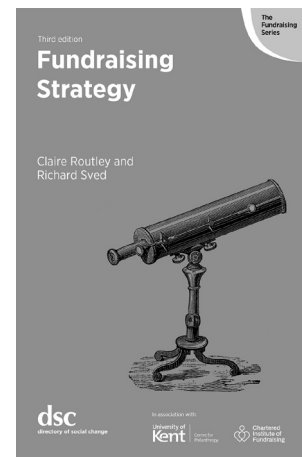
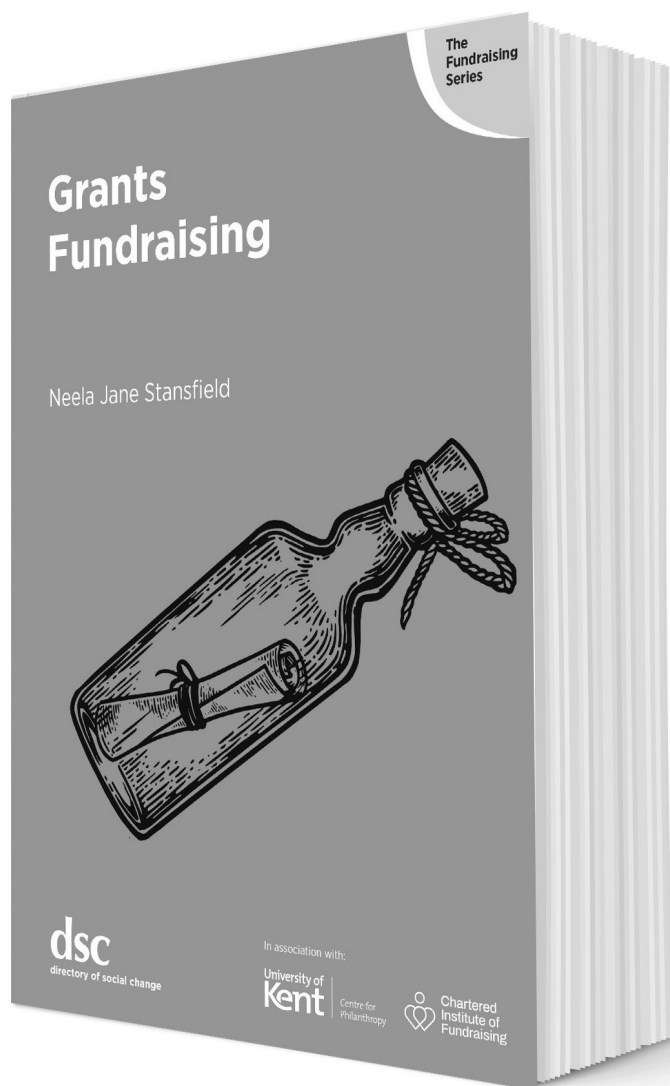
The environment and animals *page 470*

This includes:

- ▶ Agriculture
- ▶ Animal welfare
- ▶ Conservation
- ▶ Environmental education and research
- ▶ Sustainable environment
- ▶ Energy
- ▶ Biodiversity
- ▶ Coastal/marine environment

This is another broad category, so we have included separate sub-sections.

Take your knowledge further



www.dsc.org.uk/fus

THE GUIDE TO

MAJOR TRUSTS

The Guide to Major Trusts 2023/24 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 over £7.33 billion. Each grant-maker included in the guide has the potential to give over £250,000.

Now in its 17th 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:

- Detail 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 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 is such a helpful tool. It makes prospect research as simple as possible, with all the detailed information on grant-makers in one place. We couldn't be without it!'

Emma Forrest, Senior Philanthropy Manager, Blue Cross

'In the annual scramble to secure funding for services in our community, The Guide to Major Trusts is our first port of call. This well-thumbed time-saver identifies good sources we didn't know about, has clear information on making effective applications and helps us to avoid approaches to funders where their interests and our services are poorly matched.'

Mark Hinton, Chief Officer, Citizens Advice Swale

'The Guide to Major Trusts is an essential resource in our fundraising toolkit. Having such a comprehensive list of funders ensures that our prospect pipeline remains healthy and we never miss an opportunity.'

Charlotte Otter, Trusts and Foundations Manager, Southampton Hospitals Charity