

## **Brief guidance on how to apply for a grant from the Joseph Rowntree Charitable Trust (JRCT)**

### **What we fund**

The information below provides a brief overview of JRCT's five grants programmes. Before you apply, please ensure that you have read the full details of the grants programme to which you are applying for funds. This information is available in the 'Funding Priorities' section of the website.

#### **Grants programme: Peace and Security**

As a Quaker Trust, we believe that peace and security are built on values of equality, human rights, justice and environmental sustainability.

JRCT wishes to prioritise support for charitable work on the following issues:

1. Challenging militarism
2. Scrutiny of counter-terrorism measures in the context of human rights and peacebuilding
3. Building support for alternative approaches to defence and security

#### **Grants programme: Power and Accountability**

Quakers have a strong commitment to equality. We want to support people to create a world in which power is more equally shared, and in which powerful institutions are responsive and accountable to wider society and aligned with the long-term public interest.

JRCT wishes to prioritise support for charitable work on the following issues:

1. Strengthening corporate accountability
2. Strengthening democratic accountability
3. Encouraging responsible media

#### **Grants programme: Rights and Justice**

As part of the Quaker tradition, JRCT is committed to the creation of a world that guarantees equal treatment for all people.

JRCT wishes to prioritise support for charitable work on the following issues:

1. Protection and promotion of equality and human rights and their enforcement

2. Promoting rights and justice for minorities who face the most severe forms of racism
3. Promotion of rights and justice for refugees and other migrants by identifying and tackling root causes, structures and systems that may deny them their rights

### **Grants programme: Sustainable Future**

The overall focus for this programme is on developing and promoting sustainable, low-carbon alternatives to the current consumerist and growth-based paradigm.

JRCT wishes to prioritise support for charitable work on the following issues:

1. Better economics
2. Beyond consumerism
3. New voices

### **Grants programme: Northern Ireland**

JRCT aims to fund work which will contribute to the ongoing transformation of the Northern Ireland conflict. It has identified the following priority areas:

1. Strengthening human rights and equality
2. Supporting inclusive, non-sectarian and participatory politics
3. Supporting processes of demilitarisation
4. Dealing with the past

### **Cross-cutting**

We anticipate that the majority of our funding will fall under one of the five priority areas specified above. However, if you judge that your application directly relates to more than one area, and are able to clearly demonstrate this in your proposal, we will consider a cross-cutting application.

The cross-cutting route is simply a mechanism to allow the Trust to consider applications that relate to more than one programme area. It does not confer any greater opportunity to secure funds. Applications are allocated to the most appropriate grant committee and are dealt with through our normal grant procedures.

### **Am I eligible?**

JRCT is interested in funding work which:

- is about removing problems through radical solutions, and not simply about making problems easier to live with
- has a clear sense of objectives, and of how to achieve them
- is innovative and imaginative

- and where the grant has a good chance of making a difference

Within its areas of interest, the Trust makes grants to a range of organisations and to individuals.

If your organisation is a registered, excepted or exempt charity based within any of the four jurisdictions of the UK and **all** of your work fits within our published programmes, we encourage you to consider applying for unrestricted or core support, although you may apply for programme or project funding if you prefer.

If you are based outside the UK and you are registered as a charitable organisation in your local jurisdiction, you may apply for general support if **all** of your work fits within our published programmes, **and** the following criteria are also met:

- Your organisation is governed by an unpaid board
- Your organisation is not for profit
- Your organisation's formal purposes fall within the list of charitable purposes recognised within English law  
(<https://www.gov.uk/government/publications/charitable-purposes/charitable-purposes>)

For all **other** organisations or **individual** applicants, you may apply for a specific project or defined programme of work that would provide public benefit and further our aims as set out in our published policies.

**We cannot fund organisations or work that is party political (e.g. supporting or opposing a political party) or which is commercial in nature or otherwise intended for private benefit.**

Written criteria can never cover every eventuality. Once you have read this information carefully, you are encouraged to contact the Trust office by email or telephone to discuss your application. You should do this well before the deadline for applications.

All queries regarding applications should be directed to the Trust office. Grants staff aim to be available to discuss applications by telephone or email, but are unable to meet with applicants prior to the submission of an application, due to limitations on staff capacity. Please do not contact individual trustees about your application, at any stage of the process.

### **General exclusions**

The Trust will not fund:

#### Organisations:

- larger, older national charities which have an established constituency of supporters and substantial levels of reserves
- statutory bodies
- for-profit organisations.

#### Projects:

- medical research
- academic research, except as an integral part of policy and campaigning work that is central to our areas of interest

- building, buying or repairing buildings
- business development or job creation schemes
- service provision, including providing care, support or training services, such as for elderly people, children and young people, people with learning difficulties, people with physical disabilities, mental health service users, refugees or asylum seekers
- housing and homelessness
- the arts, except where a project is specifically concerned with issues of interest to the Trust.

#### Individuals:

- travel or adventure projects
- educational bursaries, including graduate and post-graduate studies
- the personal support of individuals in need.

#### Types of funding:

- general appeals
- work which we believe should be funded from statutory sources, or which has been in the recent past
- work which has already been undertaken

#### Place:

- the Trust funds individuals or groups based in the UK to undertake work at a national level. This means work that seeks to make positive change across the UK as a whole, or across one or more of its member countries – England, Scotland, Wales or Northern Ireland
- under some of our programmes, we make a small number of grants for work at a pan-European level, in relation to international institutions, or to replicate or amplify local work in the UK with wider significance. Please see individual grant policies for details.
- the Trust does not fund local or national work anywhere outside the UK.

Each programme also has specific exclusions. Details of these can be found on the individual programme pages in the 'Funding Priorities' section of the website.

## **How to apply**

**Your application will consist of the following documents:**

- 1. Narrative proposal**
- 2. Budget(s)**
- 3. Accounts**
- 4. Governing document (non-charities only)**
- 5. Closing report (existing grantees only)**

### **1. Narrative proposal**

Put into writing what you want to do, and how you will do it. There is no form for this, but please set out your proposal on no more than four sides of A4, typed in font no smaller than 12 point.

Please tell us what you want to do - not what you think we want to hear. Describe your proposal in whatever way you think is most helpful. The questions below may act as a useful prompt, but they do not need to be followed rigidly.

## **Who are you?**

In no more than a few sentences, set out who you are. Organisations might include founding date, size, legal status and primary activities. Individuals might mention current employment position and relevant interests or voluntary positions.

## **What do you want to do?**

The main part of the application will detail the work you want us to fund. If you are a UK charity, this may be the general work of the organisation. Otherwise, it should be a specific project or defined programme of work.

### *i. What and how?*

What work do you want to do? How does it fit within JRCT's funding priorities? What charitable purposes will your work promote? What are you hoping to achieve? What will you actually be doing? What is the timescale? Is the work new, or a development, expansion or continuation of existing work?

### *ii. Why?*

What led you to want to do this work? Why is this work particularly needed at this time? If you are applying for a specific project or programme, how does it fit in with the rest of the organisation's work? How does it relate to other work that is being done in the field? Why are you passionate about it?

### *iii. Who?*

Who will do the work? This might be you, existing staff in the organisation or a new recruit. What skills, experience, knowledge and networks will they need? Are these already in place and, if not, what training will be required? Who will be providing line-management, supervision and/or support? Who is ultimately responsible for the work?

### *iv. Impact?*

How will the work be documented and evaluated? How will you share the lessons learnt from your work with others? What difference will the work make?

## **2. Budgets**

Budgets should include both income and expenditure. It should be clear how much the work will cost in total and how much you are requesting from JRCT. Please list any other existing or anticipated sources of income for the work, including any pending applications with other funding bodies. On the expenditure side, as far as possible, show us the actual costs of doing the work in the way that it needs to be done, over the time that it is likely to take. You don't need to detail every item, but you should put costs under clear headings, and include brief notes to explain how you have calculated the figures, where necessary. If you are applying for funding for more than one year, your budget should cover the entire period. The budget should be in your local currency.

### *Organisations*

If you are applying for an unrestricted grant, then you should submit a budget for the whole organisation. If you are applying for a particular project or programme, or specific parts of your work, then you should include a budget for that work **and** a budget for the whole organisation.

### *Individuals*

We do not need to know about your living expenses or financial circumstances. If you are asking for funding for your time, simply include this as a salary figure or reimbursement.

We ask applicants to consider honestly and seriously what level of income is appropriate to request.

### **How much to ask for**

Ask for what you need, but be realistic. We expect that you will have thought carefully about other sources of possible funding and, if applicable, how the work will be sustained over the longer term.

JRCT usually makes around 100-120 grants per year, with a total value of around £6m, giving a nominal average grant of £50,000. Actual grants range from a few hundred pounds to £100,000+ and may be single payments or spread over up to three years. Both large and small grants are important, but JRCT usually makes its largest grants for work that is at the core of the Trust's concerns and where other sources of funding are very difficult to access.

### **3. Accounts (organisations only)**

We will need a copy of your organisation's most recent annual audited or examined accounts. If these are more than 12 months old, or are not available for any reason, please send us recent management accounts or some other indication of the current financial position of the organisation.

### **4. Governing document (non-charities only)**

For organisations which are not charities, we will need a copy of your organisation's governing document.

### **5. Closing report (existing grantees only)**

If you are applying for further funding from the Trust before your current grant comes to an end you will need to submit your closing report with the new application papers. This allows the Trust to consider a new request in the context of the work undertaken over the course of the current grant. If necessary, you are welcome to signal in the report that further activities are still envisaged before the grant concludes. The closing report questions will have been sent to you with your grant offer letter. They are also available on the Information for grantees page of our website or on request from the JRCT office.

## **Submitting your application**

Please note that we **only** accept applications submitted online. Any applications sent by post, email or fax will not be considered. To apply please go to our website [www.jrct.org.uk](http://www.jrct.org.uk) and follow the 5 step application process on the home page. JRCT has three funding application deadlines per year – dates for these can be found in Step 3 'When to Apply'.

Please ensure that you have all the following documents ready before you go online: narrative proposal, budget(s), accounts, governing document (non-charities only) and closing report (existing grantees only).

You will be asked to fill in a form with some basic details, such as contact name and address, and also select the priority area within which you are asking for funding.

You can save the form at any time, so you don't need to complete it all in one go.

## **Funding decision**

### **How JRCT will deal with your application**

Applications will receive an automated email confirming receipt.

We aim to be in touch with applicants within six weeks of receiving a proposal. Many applications will be refused at this stage, either because they fall outside the Trust's funding priorities, or because they do not make a sufficiently strong case for funding. All other applications are considered in more detail. We may ask you for further information, seek confidential external advice or arrange to meet with you. These are all ways of learning more about the proposal, but they do not guarantee that a grant will be made. We will let you know the decision in writing, as soon as possible after the Trust meeting. Although the success rate varies, typically one in five of all applications is successful.

The Trust intends that the application process should be straightforward. We try to ensure that information on our funding priorities is accurate. However, applicants should be aware that within the Trust deed and Charity law, trustees have very wide discretion in how they choose to manage and distribute the Trust's funds.

We aim to deal with all applications in a friendly and efficient fashion. If we fall short of these aims, please let us know. When refusing applications, the Trust will give feedback on the reasons for the decision wherever possible.

The Trust welcomes comments or feedback from applicants that will help us improve our grant-making process, but we do not encourage correspondence on the fairness or otherwise of particular funding decisions.

### **Funding offer**

We will write to you, stating the size, duration and purpose of the grant offer. This may not be exactly the same as your request. All grants are offered subject to our standard conditions. You can see a copy of these conditions in the 'Our grantees' section of the website. Any additional special conditions of the grant will be stated in the grant offer letter.

With the letter will be an acceptance form and other paperwork to be signed and returned. Once the forms have been returned, the relevant grants officer will discuss the schedule of payments for the grant. This is normally quarterly, in advance, by electronic transfer.

### **Re-applications**

If the Trust decides not to fund an application, we would not normally consider a further application from the same organisation for at least a year. If you are considering applying again, whether for similar or unrelated work, please check with the relevant grants officer first.

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