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Guidance for Grant Applications (Organisations)

About The Harpur Trust

We are a general grant giving charity with three broad areas of activity:

- the promotion of education;
- the promotion of any charitable purpose for the relief of people who are sick or in need, hardship or distress;
- the provision of recreational facilities with a social welfare purpose

Our grant giving programmes are restricted to activities taking place in the Borough of Bedford, or those directly involving residents of the Borough.

We encourage organisations to contact us for informal guidance on our grant giving programmes and the application process. This can save you and us time and resources.

A brief history of the Harpur Trust

The Harpur Trust was founded by Sir William Harpur (1496-1573) in 1566. He created an endowment to sustain the school he had established in Bedford, provide dowries for "poor maids" of the town and nourish and inform deprived children, with any residue to be given to poor of the town.

Currently, around £500,000 per annum is distributed by The Trust to organisations and individuals in the Borough of Bedford through the Responsive Grants Programme. We also have a number of themed programmes which increase our grantmaking pot to approximately £1,200,000. Details of the themed programmes, Transitions, Resilience (Psychological Fitness) and Isolation are available on our website.

Funding programmes and priorities

The promotion of education

We have a broad definition of education and support projects working with people of all ages and in a wide variety of settings. We are particularly interested in collaborative projects, projects which may lever in additional funding from elsewhere and innovative projects in the state sector. Other interests include education for those outside mainstream provision, including those with additional support needs.

The promotion of any charitable purpose for the relief of people who are sick or in need, hardship or distress

We will consider requests for staffing, running and capital costs for projects and core services. Through research and consultation, locally and beyond the Borough, we continually develop our grant giving priorities to respond to emerging local needs and opportunities. We are particularly interested in projects

which empower and involve communities and reduce the barriers caused by disadvantage by increasing people's capacity to provide for their own needs and access existing support. We encourage collaborative applications.

The provision of recreational facilities with a social welfare purpose

Our grant giving under this programme has a strong emphasis on projects that aim to address the needs of young and/or disadvantaged people. How a project proposal will act 'in the interests of social welfare' will be carefully considered.

The focus of this programme is on people, and how a project will significantly improve their access to valuable recreational opportunities and experiences. Successful project requests generally include aspects that complement the objectives of our 'education' and 'relief' programmes.

Who can apply

The organisation making the application must be a registered charity or other non-profit making body. It must have a constitution or other governing document and a governing body or committee of least three people. The balance of power on the board must rest in an unrelated majority with no financial interest in the organisation. We have specific additional guidance relating to social enterprises, including CICs. Please contact the grants office for more information.

The applicant organisation must be based in the Borough of Bedford, and/or be conducting specific activities aiming to meet the needs of people who live in the Borough. The Borough comprises the town of Bedford and the surrounding area of North Bedfordshire. A separate application form and guidance notes for grants to individuals is available on our website.

What we don't fund

- Businesses.
- Projects that promote a particular religion, although we do fund faith groups for completely secular work.
- Projects which we consider to be the responsibility of the local authority or national government. For example, a school applying for a grant to cover the cost of employing a teacher is unlikely to be successful because that should be funded by the state. However, the Trustees could consider an application from a school for a creative arts project that involved paying a voluntary organisation to deliver lunch time or after school workshops. If you are unsure whether or not your project is eligible please have a look at some of the examples on the Grants Awarded page of our website. Alternatively contact our Grants Team on 01234 369500. We will be able to provide informal advice and assess the eligibility of your project.
- Projects that do not benefit the residents of the Borough of Bedford.
- Costs already incurred.
- Trips, except in very limited circumstances. Contact the Grants Team for guidance.

How to apply for a grant

Please contact us to discuss your request well before you intend to submit an application. We are happy to provide assistance at any stage during the application process.

Small Grants Programme

Your application can be considered under our small grants programme if it is for:

- up to **£5,000** for a **capital** project such as refurbishments or building work at a village hall.
- up to **£2,000** for any other project.

This means you can proceed immediately to the full application form (stage two) without having to fill in our preliminary proposal form.

Please note: unfortunately applications for a small grant using the one stage process cannot be made using our web based, online application process. You will need to download a copy of the application form from our website.

Larger Grants Programme

All other funding requests will need to follow our two stage application process outlined below.

Stage One applications

We ask you to send us an outline of the project on a Stage 1 form for initial consideration before you submit a full application. We will share your Stage 1 Proposal with Trustees at one of their meetings. We will then write to you with their comments and if appropriate invite you to make a formal, second stage application. We will advise you of the next appropriate committee date.

Stage Two (the full application)

We will acknowledge receipt of your application form within a week of receiving it. Please contact us if you have not heard from us within two working weeks of submission.

Our staff will first look through your application.

We will ask you some additional questions, based on the areas of your application that we believe our Trustees will focus on when they consider your request. We may visit your project.

Trustee meetings, and when you will be notified of a decision

Depending on the size of grant you are requesting, and the type of project you are proposing, your application will be considered in the following ways:

- The Chairman and Deputy Chairman of the Grants Committee can make a decision on preliminary proposals and full applications of up to £5,000. You will normally be notified of their decision in writing within seven working days of their meeting. Remember that if your preliminary proposals is successful you will need to submit a second stage application to the next suitable grants committee meeting. The whole process can therefore take three months.
- The full Grants Committee can consider preliminary proposals and applications for grants of up to £50,000 for a single project in any one year and up to £150,000 for a project over a three year period. The Committee meets approximately every three months. If the Committee requires further information from you to support your application, they may defer making a decision until the next meeting. You can therefore expect to hear a decision on this size of request three to six

months after submission of your preliminary proposal. Please allow more time if you are submitting a request that will be processed during the summer months as there are no Committee meeting in July and August. Grants awarded by the Committee above £50,000 per year will need to be endorsed by the full Trustee Body of the Harpur Trust, which meets three times a year. These meetings usually take place in January, May and September. Awards of this size are rare, and the decision making process will almost certainly be longer than for more modest requests.

Please make sure you submit your application well before you need a final decision on your request. Please contact us or see our website for latest submission deadlines.

Filling in the Application Form

General

Please answer all the questions fully, even if you feel you are repeating yourself. Committee members are dealing with large numbers of papers, and they are likely to miss your response if you have written “See previous answer” or “see appendix 1”. If necessary, you can send in attachments with supporting documentation, but they may not be seen by the committee.

To help you with questions in application form, we publish specific guidance on our website on two topics, **outcomes and monitoring** and **full cost recovery**. We also have additional information on applications for **research** projects, **trips and expeditions** and **social enterprises**. Please contact the grants office if you would like more information on these topics.

Conditions of funding

Each application is considered on merit, and the ability of an organisation to secure alternative funding will be taken into account.

All applicants should determine their entitlement to statutory funding from the relevant departments of, for example, the Borough Council before making an application for a grant.

We may seek guidance from other organisations during the assessment of your request. If you wish us to treat the information provided in your application in confidence, please tell us as soon as possible.

Information on grants awarded to organisations will be included in our Annual Reports, our website and other general publicity materials. We will also share this information with other funders.

The Trust reserves the right to ask for further information which may include banking arrangements, the results of other funding applications and the composition of the management committee.

The Trust reserves the right to be involved in the management of projects for which it is a significant funder, for example through a seat on a management committee.

Payment and monitoring arrangements

Where a grant involves purchase of product or services, payment will normally be made on production of copies of receipts or invoices specifically relating to items or activities for which the award was agreed.

Where it funds a post, a first instalment of an award will normally be made on proof of appointment. Monitoring arrangements will be agreed to enable further instalments to be released at appropriate times.

Where a grant may run for more than one financial year, satisfactory progress reports will be required for the release of further grant instalments.

All organisations in receipt of a grant have to fill in an end of award monitoring form. This allows the Trust to monitor awards effectively, and evaluate their impact on the local community.

Additional documents

Your application may include additional documents that you believe will support your request. Please note, however, that Trustees will make their decisions based primarily on the information you have provided in your application form and accompanying letter.

Applications must be accompanied by:-

Essential for all applications:

- a copy of your most recent accounts – if your organisation is too new to have accounts or your organisation does not have audited accounts, please send a copy of the most recent bank statement
- your organisation's constitution or set of rules
- your organisation's equal opportunities policy

Desirable (over £5,000)

- budget for the coming year

Essential for specific project funding requests

- where funding is sought for upgrading a building, details of your tenure of the building and costed designs
- where funding a project post, a job description
- for projects working with children or vulnerable adults, a child protection or vulnerable adults policy
- for projects anticipating a significant proportion of funding from fees, sales or other earned income, a business plan

Signatures

Each application must be signed by the person who wrote the application and by a senior person within your organisation. The senior person might be your Chief Executive, your headteacher, or if you are applying from a university, the Dean of your school of study. A senior person could also be a Trustee, governor or member of your management committee. Please contact the Harpur Trust if you would like guidance on appropriate signatories.