



APPLYING TO A TRUST FOR PERSONAL HELP

a funding information leaflet from *funderfinder*

Making an application to a charitable trust

This document assumes that you have decided that applying to charitable trusts is for you, that you have identified a relevant trust and have decided to send an application.

Before applying to a trust you will need to answer YES to all the following statements:

- your circumstances match the criteria of the trust
- you have a demonstrable need
- the need has been brought about by circumstances that fall within the criteria of the trust
- all statutory agencies have been explored and are inaccessible or exhausted.

Remember that:

- if the trust publishes guidelines to assist applicants it is important to get hold of them before making an application
- some trusts welcome an initial telephone call from the individual or a third party, to enquire whether the application is suitable. But, you should bear in mind that only three out of every 100 grant making trusts have paid staff, so the chances are that the people you deal with at the trust will be doing the work voluntarily and may not be available during the day
- most trusts have far more applications than they can deal with. One educational trust for example used to get 50 applications per year about five years ago. It now gets more than 50 applications each day
- it is in your interest to be patient and considerate when dealing with trusts
- you should be realistic. Trusts are not an answer to long-term financial problems. Many can only give relatively small amounts or support only a few people each year.

How to apply

This is important to find out. Some trusts have their own application form and you will have to use this. They will not consider any other form of application. You'll need to write or telephone them and ask for an application form and you may need to send a Stamped Self Addressed Envelope (SAE). For many trusts you will have to write a letter of application. Some trusts accept applications by email, but you will need to check first. The following pages will give you guidelines as to what sort of information you will need to supply.

Who should apply

The application should be sent by the appropriate person. Some trusts specify the person in need make the application directly. Other trusts specify the application should be made through a referral agency/third party which may be an organisation such as a Citizens Advice Bureau or Social Services Department or a professional such as a

doctor or a member of the Clergy. If you are not sure who should make the application - check with the trust.

Timing of the application

Some trusts only meet once a year, others meet quarterly, others monthly and some consider applications on an ongoing basis. Therefore the timing of the application is crucial. In general trusts making educational grants meet less often, twice a year or quarterly seems quite common, and if you're looking for a grant for an educational need you'll often need to apply well before starting the course. If you're not sure when trustees meet it's wise to check, especially if you need the money urgently.

Writing a letter of application

If you have to write a letter of application you'll need to provide information about the person or family and the need that they have. You should include the following information:

Summary of application

- Purpose for which grant is sought
- Amount sought from this application

Information about the applicant

- | | |
|---|--|
| <input type="checkbox"/> Name | <input type="checkbox"/> Place of birth |
| <input type="checkbox"/> Address | <input type="checkbox"/> Nationality |
| <input type="checkbox"/> Telephone number | <input type="checkbox"/> Religion (if any) |
| <input type="checkbox"/> Date of birth | <input type="checkbox"/> Occupation |
| <input type="checkbox"/> Age | <input type="checkbox"/> Marital status |

Information about family members

You should include information about the following people: husband/wife or partner, children, others. You should include their name, age and occupation or school.

Financial information

INCOME (WEEKLY)

Father/husband's wage
Mother/wife's wage
Partner's wage
Income Support
Job Seekers Allowance
Child Benefit
Family Credit
Incapacity Benefit
Attendance Allowance
Disability Living Allowance
Housing Benefit
Working families tax credit
Maintenance payments
Pension(s)
Other income (specify)

TOTAL WEEKLY INCOME

EXPENDITURE (WEEKLY)

Rent or mortgage
Council tax
Water rates
Fuel costs
Insurance
Childcare
Fares or travel
Household expenses (eg. food)
Clothing
Maintenance
Hire purchase commitments
Telephone
TV rental
TV licence
Other expenditure (specify)

TOTAL WEEKLY EXPENDITURE

Don't forget to say to whom a cheque should be made payable, and to sign and date your application.

Information needed for welfare applications

Additional financial information

- Savings
- Debt/arrears - specify in detail what they are and amount owed
- Have you received help from another source? If YES include details of sources of grants obtained and amount
- Any other sources approached (you should include information about other trusts you are applying to and promise to return any surplus money)
- Total amount still required
- Have you ever received previous financial help from this trust? If so, when?

Reason for the application

You should indicate in what ways you match the criteria of the trust. If the trust gives money to people who have lived in a particular area for a certain time then information about residency in the area such as addresses lived at in the area and dates is vital. If the trust that gives grants to children whose parents had a particular job eg. minister of religion, you should include information about that parent's work.

You should say how the need arose - for example due to illness, unemployment, accident etc, what exactly the need is and how the trust can assist.

Information needed for education/study applications

Information about the course or project

- Name of school/college/university
- Course start date
- Course ends
- Course is full time / part time
- What the project entails

Information about grants

- Name of Local Education Authority
- Have you applied for a grant? What was the outcome?
- Details of any other grants/scholarships
- Have you applied to the school/college/university for help? What was the outcome?
- Have you applied to other trusts? What was the outcome?
- Have you applied for any loans? What was the outcome?
- How much are your school/college fees?
- Have they been paid in full? If not give details.
- Other costs (eg. books, travel etc)
- How much money do you need to complete the course?
- If you are asking for money for a gap year or personal development, how will you/the community benefit?

Information about qualifications & employment

- Examinations passed & other qualifications
- Previous employment with dates

Other information

- Any other relevant information.

You will need to include information to show how you match the criteria of the trust. If you are already in the middle of a course you will probably need to state how your circumstances have changed to bring about the need for additional financial assistance.

Getting help with the application

If you need help with the application you could approach your nearest Citizens Advice Bureau or other local welfare agency. Your local authority's Social Services department may be able to let you know of a local source of advice.

More general information about applying to trusts and a model application form can be found in the introduction to the Directory of Social Change's *A Guide to Grants for Individuals in Need*. This can be used in cases where the trust does not produce its own form. The book is likely to be available in your local reference library.