



PARENT LINK INFORMATION SHEET

FUND FINDER

Making an application to a charitable trust

You have identified a relevant charitable trust and you have decided to send an application. This sheet is designed to provide some basic advice about applying.

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.

It is often advisable to make some preliminary enquiries to the trust before applying.

- 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.
- You should also bear in mind that 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.

Application form or in writing?

This is important to find out. Some trusts have their own application form and you will have to use

this to make the application. 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'll have to write a letter of application. There is a separate document (Application Checklist) which is based on a model form produced by then Directory of Social Change. This form can be found in the introduction to its directories for individuals such as *A Guide to Grants for Individuals in Need*. This could be used in cases where the trust does not produce its own form.

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 by a 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:

- name, address, place and date of birth
- family circumstances (i.e. married, widowed, separated, divorced, the number and ages of dependent children)
- financial position (a breakdown of weekly income and expenditure including details of benefits awarded or refused, savings, debts or bills to be met, etc)
- information about the reason for the need and how it arose (e.g. illness, unemployment)

- information about other sources of help that have been approached without success
- how much money you are requesting and what it will be used for
- if you're approaching a number of trusts you must mention this and explain that you will return any surplus money to the trust.

You must tailor the application to the trust. If the trust gives grants to people because of where they live you should emphasise your connection with the place - for example how long you've lived there and addresses lived at. If it's a trust that gives grants to dependants of people in the armed forces, the trust will need to know about your relatives who were in the forces. You should ensure that you include all the information that is relevant to your application.

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.

Summary of application

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

Information about the applicant

- Name
- Address
- Telephone number
- Date of birth
- Age
- Place of birth
- Nationality
- Religion (if any)
- Occupation
- 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

Sickness Benefit

Child Benefit

Family Credit

Attendance Allowance

Mobility Allowance

Housing Benefit

Maintenance payments

Pensions

Other income (specify)

TV rental

TV licence

Other expenditure (specify)

TOTAL WEEKLY INCOME

EXPENDITURE (WEEKLY)

Rent or mortgage

Council tax

Water rates

Electricity

Gas

Coal

Insurance

Fares or travel

Household expenses (e.g. food)

Clothing

Maintenance

Hire purchase commitments

Telephone

TOTAL WEEKLY EXPENDITURE

This page is relevant for welfare applications. Page 3 is relevant for education applications.

Additional financial information

- Savings
- Debt/arrears - specify in detail what they are and amount owed
- Has the applicant 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
- Has the applicant ever received previous financial help from this trust? If so when?

Reason for the application

You should indicate in what ways the applicant matches 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 the person's residency in the area such as addresses lived at in the area and dates is vital. If the trust that gives grants to children of service people, information about the parent's service record should be included.

You may wish to say how the need arose - for example due to illness, unemployment, accident etc.

Information about the need should be included and how the trust can assist.

- To whom should a cheque be payable?

Sign and date the application

Relevant 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 please give details.
- Other costs (e.g. books, travel etc)
- How much money do you need to complete the course?

Information about qualifications & employment

- Examinations passed & other qualifications

- Previous employment with dates

Other information

- Any other relevant information.

You will probably 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.

Sign and date the application