



Guidance for Small Grants 2024

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Introduction

Wakefield Tetley Trust provides grants to support charitable and voluntary activity in the London boroughs of Tower Hamlets, Southwark and the City of London. We aim to support high quality charitable work that will improve the lives of people and communities experiencing disadvantage. If you would like to know more about the grants we make, do look at our Annual Report and Accounts, they can be found at the [Charity Commission website](#).

Small Grants (previously Fast Track grants)

We changed the title of our grants programme as the majority of applications are for regular project work and funding gaps, rather than emergency need. We still process our grants within a relatively speedy timeframe (about 5-6 weeks) and we can move faster if the need is very urgent.

Who we want to support

We continue to prioritise **Tower Hamlets** for our Small Grants.

Please see page 4 if you are an applicant from Southwark or City of London.

The Small Grants programme aims to support work with individuals and communities who are marginalised or disadvantaged for example because they have difficulty in accessing resources, face discrimination or may experience poorer social, economic and health outcomes made worse by the cost of living crisis.

We want our funding to benefit people who are particularly disadvantaged and that might include

· Carers · Disabled people · Children with special needs · People from Black, Asian and minority ethnic communities · Refugees · People with no recourse to public funds · People in manual or insecure work · Families affected by domestic violence and abuse · People experiencing poor mental health · People living alone who may be isolated

The programme will be open to small charities, community groups and CICs, **especially those working at grassroots and community level**, providing services and activities in **Tower Hamlets**. We understand that charities and community groups working with marginalised communities may be under financial stress, so we will fund project costs or core costs including staff salaries and running costs.

We particularly encourage applications from grassroots organisations. We know that funding is hard to come by for local voluntary groups that don't often have staff, such as tenants and residents' associations and self-help groups.

The funding we offer

We offer grants from £500 - £6,000. Please note that grants of £6,000 will be exceptional, most awards will average £3,000. Keep this in mind when making your application and get in touch with us first if you are considering an application for the maximum amount.

Applications will be accepted from registered charities and community groups with annual income of £600,000 or less.

What costs will we contribute to?

We consider requests for project costs, time limited activities, core costs including staff salaries, rent and running costs, requests for service adaptations or to meet additional costs that you incur to adapt your services to reach vulnerable people.

Definitions of project funding and core funding

Project funding means grants restricted to the delivery of a specific project or defined set of activities, often (but not always) including a percentage contribution towards general running costs.

Core funding means grants restricted to either a specific element of overheads (for example, rental costs or the Director's salary) or grants available to be used for essential running costs more broadly.

If you request core funding, we are more likely to support your application if

- ✓ You are a registered charity established for 3+ years
- ✓ Your unrestricted reserves (including designated funds) are less than your future 12 months expenditure or projected expenditure
- ✓ You don't have employed or paid fundraisers
- ✓ Your core costs relate to regular activities or services in place for at least 12 months
- ✓ You can demonstrate an effective use of volunteers
- ✓ Your organisation doesn't have outstanding loans
- ✓ Your core costs relate to ongoing work not new work

Eligibility checklist

To be eligible, your organisation must

- ✓ Be a small and local third sector organisation providing services and activities in the London Borough of Tower Hamlets
- ✓ Be a registered charity or community group with a constitution or a set of rules which governs its activities or a Community Interest Company Limited by Guarantee (special criteria apply, please go to page 5). Registered charities can apply on behalf of small un-constituted community groups but please contact us to discuss eligibility first
- ✓ Have its own bank or building society account where two or more named people (including one trustee or management committee member) must authorise all payments
- ✓ Provide annual accounts for the previous financial year (the programme does not support newly established organisations)
- ✓ Have an income of less than £600,000 in the most recent financial year
- ✓ Have a sound track record of charitable work in Tower Hamlets
- ✓ Deliver over 70% of your existing work in Tower Hamlets, if you are applying for core costs and work across one or more boroughs

- ✓ Have submitted a progress report, if you have received funding from us before

Your application is unlikely to be processed if you can't meet the criteria. Get in touch if you are unsure.

Exclusions

***This programme is not open to applicants from Southwark or City of London.** We may offer a very limited number of grants to organisations working in **Southwark** or the **City of London** who can apply by invitation only.

Our permanent exclusions are

- Grants to individuals
- Work that has already taken place
- Applicants who have been rejected by the Trust within the last twelve months
- Organisations already in receipt of a grant which has not expired
- Organisations with significant unrestricted reserves
- Organisations in serious financial deficit
- The promotion of religion
- Animal charities
- Statutory bodies and work that is primarily the responsibility of central or local government
- Health trusts, health authorities and hospices (or any sort of medical equipment or medical research)
- Environmental improvements
- Building restoration or conservation
- Uniformed youth groups
- Schools or projects working with schools or vocational training

Our Small Grants programme opened on 16 May. Applications will be accepted by the following deadlines:

Monday 27 May, for a decision on Tuesday 25 June

Monday 08 July, for a decision by Friday 02 August

Monday 02 September, for decision by Tuesday 24 September

Monday 04 November, for decision by Tuesday 03 December

Community Interest Companies – this page only applies to CICs

CICs can apply if they meet the following criteria.

1. CICs must be a company limited by guarantee, a Community Interest Company limited by guarantee or a community benefit society. We do not fund companies/CICs limited by shares, co-operatives or sole traders;
2. CICs applying for funding must demonstrate that the purpose for which they are requesting funding is wholly charitable;
3. Where the CIC is simply a company limited by guarantee, the company objects must be focused on charitable purposes;
4. They should have evidence that their enterprise allocates at least 50% of income to goods or services with a charitable purpose (or for newer enterprises have a business plan which clearly demonstrates a realistic likelihood of this being achieved soon). If the enterprise is a project of a larger charity, the charity does not need to have this percentage of traded income overall;
5. There must be a board of at least three Directors listed at Companies House;
6. The balance of power on the board should rest in an unrelated (not members of the same family) majority who have no financial interest in the company;
7. If Directors and employees are the same people, line management arrangements must be judged to be transparent and appropriate;
8. This same point applies in cases where staff and Directors are related or connected by marriage or similar relationships;
9. We will not fund social enterprise start-ups; CICs must have a demonstrable track record of service delivery of at least three years, and evidence of grant funding from established funders in the past 3 years;
10. We will not fund core salary costs for a non-charity organisation, only costs for individuals working on a project which is purely charitable (which can include relevant line management costs and project related running costs);
11. Directors' remuneration must be judged to be reasonable and remuneration arrangements should be transparent. Applicants will be expected to explain the basis on which remuneration has been calculated;
12. Organisational profits or assets must be solely tied to reinvestment into charitable purposes.
13. Your CIC has preferably worked in Tower Hamlets before.

CICs are asked to complete an application form for CICs only, available on the website or from us by email. See **How to Apply**.

How to Apply

We ask you to complete an application form and we will confirm by return email if your application is eligible and will be assessed.

The **Small Grants application form** is available in Word or PDF format and is downloadable from our website or sent to you on request, email us at enquiries@wakefieldtrust.org.uk. The PDF version is for reference only, the Word version is the one you should complete and return to us as a **Word** document. Community Interest Companies should request a **Small Grants (CICs only) application form**.

If you have not applied to us before, we may ask you to give us 1 or 2 referee contacts before we will proceed with the assessment.

We ask you to clearly demonstrate

- Your recent good track record in delivering your work
- A good case for why you need this small grant and how it will help
- Your understanding of the challenges you face and how you will respond
- That you learn lessons as you go along and put the learning into practice

Supporting documents

You will need to submit separate supporting documents with your application form

- ✓ Your constitution or equivalent
- ✓ A list of your key Officers, Trustees, Directors or Management Committee and Executive staff
- ✓ Your latest Annual Report and Accounts (or a link to the Charity Commission website where they are listed)
- ✓ A detailed budget for the work you applying for
- ✓ A recent organisation bank statement for your main bank account, no older than 3 months (so we can transfer grant funds if you are successful)
- ✓ If you have never received funding from us before, we may ask for a reference from one or more recent funders

If you have any questions or need help to complete the form, please contact us.

How we assess your application

Our trustees meet regularly to assess applications on the following:

- The financial viability of your organisation and your financial plan for this work
- Governance is satisfactory, there are no concerns and there is a good track record
- Evidence that support is given to the most vulnerable and marginalised groups and individuals
- Evidence that the work is helping people in a way that is not already provided by another organisation to the same people or is available elsewhere

Our Funder commitment

We made many grants through the London Community Response Fund during 2020-21 and we are still committed to those shared principles which inform how we work.

Adapting activities – acknowledging that agreed outcomes may not be achieved in the timeframes originally set

Discussing dates – not adding pressure on organisations to meet tight reporting deadlines

Financial flexibility – allowing organisations to use money differently e.g. buying equipment and covering staff sickness

Listening – encouraging frank conversations between funders and grantees, with funders being supportive of their needs.

If you are awarded a grant

We will notify you of the grant in an Offer Letter and will ask you to sign our Standard Terms and Conditions before we can release the grant funds.

Reporting back to us

- We will agree a date with you to return a Monitoring Report to us, usually within 3 months of the work (or project) ending.
- If your grant was for core funding we encourage you to submit a report you are already producing, this could be an impact report, your annual report or an existing report to another core funder. We offer a simple template report if you prefer to use that instead.
- We want to support opportunities for learning, so we encourage you to report when things did not go well, not just successes. Your openness to sharing lessons learned means a lot to us.
- We welcome video and photographic reports and opportunities to visit and meet with your staff or volunteers and users.
- We will sometimes offer or ask for the opportunity to report back by telephone or online meeting.

Confidentiality

We reserve the right to make public the grant amount offered to your organisation, but other detail is retained by us except it can be given in confidence to our advisers and as required by law and/or by regulators such as the Charity Commission

We might use personal information provided by you to conduct appropriate identity checks. Personal information you provide may be disclosed to a credit reference or fraud prevention agency, which may keep a record of that information.

Data protection

We will use the information you give us during the application process and during the lifetime of any funding for administration, analysis and research purposes. We recognise the need to maintain the confidentiality of vulnerable groups and their details will not be made public in any way, except as required by law.

We will sometimes add additional conditions to an individual grant to take account of circumstances. These will be included in the grant offer letter.

Acknowledgement

We ask you to not publish details of your grant until after you have signed the terms and conditions.

We ask you to acknowledge our funding in your communications about the work we are funding or, say, your annual report or website.

In turn, we routinely list our grant to you in our annual report and accounts. If we publish details of your project on our website, social media or elsewhere, we will consult you in advance on the content.

Press releases

We don't issue press releases but if you wish to include acknowledge our funding in a press release of your own, please use this standard paragraph about our Trust in your own release.

Notes to Editors:

Wakefield Tetley Trust is a small grant-maker working in the City of London, Southwark and Tower Hamlets. We aim to support people in need by funding local community-based charities and organisations. Our annual grants programmes are open to all registered charities and community groups in these communities and we welcome applications that support urgent work, core activities or make a practical difference. In 2023 we provided £80,000 in grant funding towards work in support of our aims. www.wakefieldtrust.org.uk.

Images

We are always grateful if you can share with us photos and videos of the work we have supported. If you send these as part of your report to us, please give details of anyone to be credited and confirm that you are happy for use the images you have sent to us. Where children are featured, we do need your confirmation that you have written parental permission to use those photos or videos.

The Trust's rights (summary)

We sometimes add additional conditions to an individual grant and these will be included in the grant offer letter.

We may ask to visit you to see the work funded during the life of our funding.

We can publish the name of your organisation and the broad nature of our offer, but we won't disclose further details publicly except as required by regulators.

We will use the information you give us during the application process and during the lifetime of any funding for administration, analysis and research purposes. We recognise the need to maintain the confidentiality of vulnerable groups and their details will not be made public in any way, except as required by law.

We reserve the right to withhold a grant or require repayment if:

We find that any false information is supplied to us deliberately

The work undertaken is not the work for which the funding was approved and where we have not approved these changes

Your organisation becomes insolvent or goes into administration, receivership or liquidation and the funding has not been spent on its intended purpose

To see the full conditions of receiving a grant, you can request our Standard Grant Terms and Conditions.

Contact Us

We do not list contact telephone numbers on our website. Email us via the website or the enquiries@ address below and we'll get back to you.

Joint Clerks to the Trustees are Cherry Bushell and Elaine Crush.

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 [@WakefieldTetley](https://twitter.com/WakefieldTetley)

Normal office hours are Mon-Thursday 9-6pm.