

APPEAL GUIDELINES and APPLICATION FORM

The Roger & Douglas Turner Charitable Trust (CIO 1154467) makes grants to Registered Charities in Birmingham, the Black Country (Wolverhampton, Sandwell, Walsall, Dudley), and in Worcestershire (the 'beneficial area').

Appeals are not generally accepted from areas outside those described above, however, appeals may be considered from national or regional charities which can demonstrate specific charitable work and public benefit in the beneficial area.

The Trust awards grants to registered charities only. The Trust does not give grants to individuals, Community Interest Companies, social enterprise, or other not-for-profit organisations. The Trust does not generally support charities that have access to significant public sector funding, large investment portfolios, large defined-benefit pension fund deficits or excessive reserves.

Appeals may be for a project, capital expenditure or for core costs – but not for an individual's salary.

The Trustees usually meet in March, July, and November. Please visit our website for submission deadlines, as actual dates will vary each year. Appeals arriving late will be retained and carried over to the following meeting. Incomplete appeals will be discarded if information is not received within 12-months of the initial appeal being received.

Most grants made to new beneficiaries are generally between £1,000 to £3,000. Appeals for larger capital grants, however, may be considered particularly from charities which have been supported in the past. You must specify the amount you are appealing for otherwise your appeal will be referred back to you.

Please do not appeal for a project until its financial viability is clear as we do not generally give conditional grants or commitments to future funding.

The Trust has a one-page Application Form which should be completed and returned by email to jenny@turnertrust.co.uk. Please ensure the appeal form remains on a single page.

Along with your application form please send:

1. A short, supplementary letter (not more than two pages) on letter heading to explain the appeal in more detail.
2. Signed accounts which should generally be for a period ended no earlier than 18 months prior to the date of the application. Trustees may not be able to reach a decision based on old financial data.
3. A copy of a bank giro credit to minimise the risk of fraud, error, or mistake.

Applicants can contact the Trust for guidance on any other aspects of an application, by visiting our website www.turnertrust.co.uk, emailing jenny@turnertrust.co.uk or calling 01299 848252.

Applications are acknowledged on receipt and the decision is notified after the Trustees' meetings. The Trustees' decision is final, and they do not give a reason why an appeal is supported or declined.

Supplementary notes from application form (marked as * and **)

1. Reportable incidents can be found on the Charity Commission website. www.gov.uk/guidance/how-to-report-a-serious-incident-in-your-charity
2. If your charity's income is below the Charity Commission threshold for submitting an annual report, please ensure that you enclose a copy of your annual return with your application

Please email your application to:

Jenny Harris at jenny@turnertrust.co.uk

Grant Application Form

Name of Applicant Charity	
Registered Charity Number	
Ultimate parent charity (if any)	
Name of person applying	
Position in Charity	
e-mail address	
Telephone number	
Charity Address & post code	

Please complete all applicable sections, print, and sign, and return via email.

What is the application for? <i>(choose one only and delete as appropriate)</i>	Core	Project	Capital
Please give a synopsis of your appeal (Maximum 30 words – more details should be in an attached letter):			

Please provide some data to help us to understand the size/scale of your work:

How many beneficiaries in total do you support each year?	
How many people are expected to benefit from this appeal in our beneficial area?	
How much are you appealing for? (a specific amount must be specified)	£
List other grant-making bodies to which you have appealed e.g., Trusts, Lottery etc:	

*Only complete this section for a **project or capital appeal**:*

When does(did) the project start?	
What is the full cost of the project?	£
How much will your organisation contribute towards the project?	£
How much are you trying to raise?	£
How much have you raised already?	£

For all appeals:

Declarations about your charity:		
Over the last ten years, has your charity had any reportable incidents to the Charity Commission? (Delete as applicable).	Yes	No
If you answered yes , please provide details on a separate sheet **see note 1 on the guidelines		

Checklist for all appeals:

Tick to confirm you have attached a supporting letter	
Tick to confirm your latest Annual Report is on the Charity Commission website * see note 2 on guidelines	
Do you have a safeguarding policy for vulnerable beneficiaries?	Yes No N/A
Tick to confirm you have attached a copy of your charity's Bank Giro Credit	
If applicable, tick to confirm details of reportable incidents	

General Data Protection Regulation 2018: By signing below, applicants agree to the use of any personal data for the Trust's legitimate interests. A copy of the Trust's Privacy Policy may be obtained upon request.

Signature: _____ Date: _____

Please email this form and all supporting documents to: jenny@turnertrust.co.uk