



Grant Appeal Guidelines

The Roger & Douglas Turner Charitable Trust makes grants to Registered Charities within our beneficial area: Birmingham, Worcestershire, Herefordshire, and the Black Country (Wolverhampton, Sandwell, Walsall, and Dudley).

The key sectors we support are Children & Young People, Health & Disabilities, Community, Social Support and Hospices with limited support for Environment & Heritage and The Arts.

Appeals will only be considered from charities that have been fully operational for a minimum of 3 years and all appeals must be accompanied by accounts no older than 18 months prior to submission. Grants are awarded for use by the wider public and not for small inclusive groups.

Grants may be made to national charities, who are headquartered or have a hub in our beneficial area and have a history of grants having been received from ourselves and can demonstrate specific work in the beneficial area (not merely an estimated proportion of overall work).

The Trust does not give grants to Individuals, Community Interest Companies, Social Enterprises, or other Not-For-Profit Organisations.

Charities with large investment portfolios, defined-benefit pension fund deficits, excessive reserves, high levels of overheads or fundraising costs are generally not supported.

The Trustees usually meet in March, July, and November and our website shows submission deadlines for appeals. Late or incomplete appeals are carried over to the next meeting but will be discarded if any outstanding information is not received within a year of the date of the appeal.

Appeals can be for core costs but those from new beneficiaries should generally not exceed £5,000. Appeals for larger capital or other projects may be considered (principally from applicants previously known to us) once a project's financial viability is clear; we do not commit to future funding.

Any registered charity wishing to appeal with mitigating factors that fall outside of our guidelines must contact the Grant Officer prior to submitting an appeal.

Application forms are available through our website www.turnertrust.co.uk. Applications are acknowledged on receipt and the decision is notified after the relevant meeting. The Trustees' decisions are final, and they do not generally give a reason why an appeal is supported or declined.

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. Confirmation that signed accounts, which should generally be for a period ended no earlier than 18 months prior to the date of the application, are available through the Charity Commission. For Charities below the submission threshold, the latest set of annual accounts should be sent with the application. Trustees may not be able to reach a decision based on old financial data.
3. A copy of a bank giro credit or bank statement to minimise the risk of fraud, error, or mistake.
4. A short explanation of any reportable incidents to the Charity Commission, where applicable.

You must ensure all sections of the application form are completed and specify the amount you are appealing for otherwise your appeal will be referred back to you. Any incomplete appeals will be held for 12 months, and failure to resubmit will result in the appeal being destroyed.

Completed application forms should be emailed to grants@turnertrust.co.uk. We do not accept appeals through the post.