



## ROTHSCHILD FOUNDATION

### Strategic Grants Application Guidance

The Strategic Grants programme makes a long-term investment in our core priorities in culture, sustainable food and for young people. Here you'll find out the steps to make an application.

1. Read the application guidance and guide to the priority area relevant to your work: culture, sustainable food systems or young people.
2. Create an account on the Rothschild Foundation's grant application portal or log in to your existing account.
3. Take our quiz and confirm you're able to apply.
4. Talk to us about your application. Share pre-application questions with the Grants Team or set up a pre-application meeting by emailing: [grants@rothschildfoundation.org.uk](mailto:grants@rothschildfoundation.org.uk)
5. Prepare and submit your application through the online portal.
6. We may wish to discuss your plans further and ask you to share more information or answer particular questions about your proposal.
7. Decision timescale. Applications of under £30,000 will hear the outcome of funding within 2-3 months. Applications over £30,000 will be discussed at Trustees meetings in July and November each year and announced afterwards.

### What we will fund

**Organisations** – We fund not-for-profit organisations which deliver activity that is legally charitable and for public benefit. Eligible entities: Registered Charities, Community Interest Companies with an asset lock, Charitable Incorporated Organisations, non-profit making Limited Companies, Incorporated Community Groups and Community Amateur Sports Clubs. If your organisation is not on this list please contact [grants@rothschildfoundation.org.uk](mailto:grants@rothschildfoundation.org.uk) to ask us about eligibility.

Organisations which are formally constituted but not listed with a regulator, such as the Charity Commission or Companies House, can apply for smaller grants of up to £5,000 for 1 year.

**Buckinghamshire Focus** - Only organisations providing a service to residents in the county of Buckinghamshire can apply. We don't fund in Milton Keynes or neighbouring counties. If your organisation provides a service in Buckinghamshire but isn't based there, we'd hope to see more than half of your activity in the county to be relevant for funding. You can also apply if your organisation is based outside Buckinghamshire but works in partnership with others located there.

**Track Record** - We are interested in supporting organisations which can show they understand the needs of Buckinghamshire communities and provide evidence of making a positive difference in the county already.

**Financial Requirements**- We prioritise small and medium sized organisations with income of under £1 million annually. Applicants must hold a bank account in the name of the organisation applying. If your organisation has been operating for less than 12 months please arrange a pre-application conversation by emailing [grants@rothschildfoundation.org.uk](mailto:grants@rothschildfoundation.org.uk)

**Partnership Applications** - We encourage applications which help organisations to work together. Partnership applications should be led by one organisation responsible for grant administration and payments to partners. All partners and their registration details will be detailed in the application. If your organisation is part of a partnership application you can also apply individually so long as there is no duplication of funding or activity.

**Project & Core Costs Funding** – Grants are available for specific projects or for organisational core costs. You're welcome to apply for support to service re-design, evaluation, governance and staff training. We can't replace lost income or reimburse activity which has already taken place.

**Capital Funding** – Capital grants are available though we prefer to not be the only funder of capital projects. If your capital request is over £15,000 we'll ask to see who else is match funding.

**Budget planning** - Applicants are asked to submit a budget detailing the total cost of the proposed activity or an organisational budget if applying for core funding. Please make sure that your budget includes any **anticipated travel costs**, and whether private transport and travelling to meet and accompany young people and people with special needs or disabilities may be beneficial. We would also encourage you to budget realistically for marketing and **outreach**, particularly how you may signpost people to your activity to improve access to hard to reach groups.

**Current Covid-19 Support Fund Grantees** – May apply for Strategic funding so long as the grant applied for does not duplicate support from the Foundation.

**Local and Community / Impact Grantees** – Current grantees are not eligible for Strategic funding. Once your grant comes to an end and you have submitted your end of grant report, you can re-apply for a Strategic grant.

#### **What we can offer**

- Applications for grants under £30,000 may take 12 weeks' between submission of application and notification of decision.
- Applications for grants over £30,000 will be reviewed at bi-annual Trustees meetings and confirmed in July or November every year.

**Grant size** – Funding is offered flexibly so applicants can apply for what they need. Grants are available for one, two or three year periods. The amount of information required at application and in reports will increase for larger grants.

**Grants of up to £5,000 for a minimum of 1 year** - Available for incorporated associations, such as groups and societies and organisations not registered with a regulator, such as the Charity Commission or Companies House.

**Grants of up to £100,000 per year for up to 3 years** - Available for organisations which are registered with a regulating body such as the Charity Commission or Companies House.

**No Application Deadline** – Apply any time - there is no deadline.

**Decision Timescale** – We try and process applications quickly. It may take longer to hear the outcome of your proposal when we receive lots of applications.

## **What to include in your application**

Applications are made online through the portal reached through the [Rothschild Foundation website](#).

**Eligibility Quiz** – Complete the brief quiz which confirms you meet the criteria for a Strategic grant.

**Application Form** - Select an application form based on the total value of your grant regardless of timescale.

*Organisation and Contact Details:* Primary contact information for the lead organisation applying for funding.

*Your Organisation:* Describe your organisation, its strengths and achievements. You will be asked to detail the number of staff and volunteers working with your organisation. Applicants should specify their organisation's turnover and reserves. You will be required to upload your organisation's governing document and management accounts here.

*Your Funding Request:* Detail the total amount of funding you would like to request, the type and duration of funding. The application will ask you to summarize the activity you wish to deliver with the funding. You will also need to provide a budget detailing the total cost of your activity or your organisational budget if applying for core funding.

*Evidencing need:* We will ask you to evidence the need for your activity and to identify the data sources you have used as evidence. We appreciate that data can come from a range of different sources, including local or national research, data and surveys, conversation and consultation with the people you work with, evaluation of previous activity, gaps in provision or waiting lists. Sources of data could include the [Time for a Bucks Food Partnership](#) report, [Local Insights](#), the Centre for Education and Youth's research '[Supporting Youth Transitions in Buckinghamshire](#)' or [Audience Finder](#).

*Funding Priority:* Comprehensive guidance on funding themes– culture, sustainable food systems and young people – and priorities addressed in each theme can be found separately on our website.

You should select which funding theme and priority or priorities your activity is addressing. Describe what activity you will deliver and how it contributes to the selected priority or priorities. Applicants will detail how they propose to monitor and evaluate the activity. They will also outline how they will connect with other organisations to deliver greater impact.

*Partners:* The application will ask you to detail who you will work with. If working with individuals, please state their name and role only. If working with organisations please detail your key contact, the name of the organisation, its registration details and role in your collaboration.

*Beneficiaries:* To gain understanding the communities supported by our funding applicants are asked to detail particular groups, age groups, ethnicities, disabilities, gender and location of people who will benefit from your project or organisation. Please state if your activity targets a particular group and if so, which group is the primary beneficiary overall.

*Monitoring:* It is not required to complete this section of the application and we won't use the information gathered here to assess it. Please do respond if you'd like to share that your organisation is led by young people or by people with a disability or from an ethnic minority background.

**Please share these documents with your application;**

- Governing document or constitution
- Management accounts
- Budget
- Proof of your organisation's bank account (required if funding is confirmed)

**Applicants will be asked to confirm they have the following policies in place:**

- Safeguarding
- Health and Safety
- Equality
- GDPR

**What we won't fund**

- For-profit organisations and businesses. Community Interest Companies may apply, but only those limited by guarantee.
- Organisations lacking a demonstrable track-record of working in Buckinghamshire.
- Projects that benefit people living outside the county of Buckinghamshire.
- Projects with budgets detailing more than 50% capital costs, including restoration or refurbishment of buildings.
- Projects with budgets detailing more than 50% costs for procurement of equipment, including IT equipment.
- Reimbursement for work that has already been delivered.
- Proposals that are only for the benefit of one individual including academic research, scholarships, bursaries, or any kind of student fees.
- Proselytizing organisations and the promotion of religion.
- Overseas travel, expeditions, adventure and residential courses, and respite breaks unless they are based in Buckinghamshire.
- Repayment of loans or debt.
- Statutory bodies including schools, prisons and hospitals. Town and Parish Councils or Community Boards may be considered as part of wider strategic initiatives on a case by case basis in discussion with the Grants Team.
- Schools should consider applying to the Schools Access Fund. In some exceptional circumstances we will accept applications from schools for non-statutory provision and projects. A pre-application conversation is recommended and can be arranged by emailing [grants@rothschildfoundation.org.uk](mailto:grants@rothschildfoundation.org.uk)
- Organisations providing medical care or medical equipment.
- Animal welfare charities and campaigns.

**Reporting**

If you're awarded a Strategic grant you will be asked to report to the Foundation annually until the end of the agreed funding period. Reports will include reflections on how your organisation has addressed priority areas of focus, important learning and expenditure.

**Acknowledging your grant**

If you wish to publically acknowledge the support of the Rothschild Foundation our logo can be downloaded from our [website](#) once you have been awarded a grant. We ask to approve all use of our logo prior to publication. The Rothschild Foundation will also connect with and share information about grant holders on the news section of our website and on social media.