



## The Charles Plater Trust

Registered Charity: 309719

# Application Guidelines

## 2018

The Trust welcomes applications for grant funding for projects in any of the following:

- *Laity Leadership*
- *Social Action*
- *Applied Research*

Applications must be sent as an e-mail attachment to [plater@plater.org.uk](mailto:plater@plater.org.uk) by

**5:00pm on Thursday 4<sup>th</sup> October 2018**

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### 1. About the Charles Plater Trust

The Trust's Mission Statement:

**The Plater Trust enables people to learn how the way we live and work can become more fully human in the light of the Gospel and the application of Catholic Social Teaching.**

More information about the Trust can be found on its website [www.plater.org.uk](http://www.plater.org.uk)

The Plater Trust grants funding to recipients that best support the mission and values of Fr. Plater and of the former Plater College. Following a recent review, the Trust now makes grants each year for projects aligned with three themes:

- **Laity Leadership**  
*Proposals for grant aid should be aimed at deepening the awareness of Catholic Social Teaching and Thought to better equip people to take on leadership roles in tackling poverty, exclusion, economic inequality, or environmental concerns.*
- **Social Action**  
*Grants for this theme need to demonstrate how the applicant's project will deliver tangible outcomes to tackle poverty, exclusion, economic inequality or environmental concerns through education or training activities.*
- **Applied Research**  
*Grants will be awarded to projects which seek to develop and apply Catholic Social Teaching and Thought, in partnership with those who are working in and delivering social action work, with a view to ultimately improving practice and public policy.*

Grants are typically around £30,000 - £50,000, to be spent within two years. However, for exceptional projects the Trust may, at its discretion, consider higher levels of funding.

## 2. About this year's bidding round

- 2.1 Following a major review of the Trust's grant making activities, the Trust now invites bids across all three of the areas (or themes) it has traditionally funded.
- 2.2 Since the Plater Trust awarded its first grants in 2008, it has funded 33 diverse projects, each contributing to the Trust's overall aim of advancing social justice through education. With the growing awareness of, and interest in, Catholic Social Teaching and Thought, the trustees are keen to maintain and enhance the contribution of its funded projects to CST and social justice.
- 2.3 Applications must be sent as an e-mail attachment to [plater@plater.org.uk](mailto:plater@plater.org.uk) by **5:00pm on Thursday 4<sup>th</sup> October 2018**

## 3. Eligibility Details

- 3.1. Applications will only be considered from organisations (normally registered charities). **Applications will NOT be considered from or for individuals.** The Trust will consider applications to fund a scholarship (e.g. a PhD) on a relevant topic, providing that the applying academic organisation ensures that it holds an open competition to select a candidate to undertake the grant-funded research

The applicant organisation(s) must be based within England and/or Wales.

- 3.2. The Trust will consider applications from organisations seeking to use a Plater Trust grant as match funding as part of a larger project, but only if it contributes to an effective delivery of the Trust's objects.
- 3.3. Applications from a consortium or partnership of organisations will be given consideration if the project is relevant to the delivery of the project's aims and objectives, has a clearly listed chief contact from the lead organisation, and fulfils all other eligibility criteria.

## 4. Format for Grant Applications

The Trust does not provide a specific application form but expects applications to be in the following format:

- 4.1 Be no longer than eight A4 pages equivalent, excluding any cover page;
- 4.2 Be typed in 11-point font size or larger;
- 4.3 Contain numbered paragraphs and numbered pages;
- 4.4 Include an executive summary, of no more than 250 words, in bullet-point format;
- 4.5 Should clearly state which specific theme they are addressing and how it contributes to the Trust's long-term mission.
- 4.6 Address the criteria listed in Section 5 below;
- 4.7 Be in Microsoft Word (.doc/.docx), or .pdf file formats. Please do not attach digital media files such as film, still images or audio.

## 5. Content of Grant Applications

The application document should be clear and avoid the use of technical terms, acronyms and jargon and, where abbreviations are used, write them out in full in the first instance.

Please ensure you cover the following points:

- a) Include the applicant organisation's name and all relevant contact information, as well as the organisation's aims and objectives;
- b) Provide the applicant's legal status (registered charity, academic institution, etc.), using the full corporate name used to sign contracts and receive funds should the application be successful;
- c) Specify the chief contact for the project along with that person's telephone number(s) and postal and e-mail addresses;
- d) Outline the applicant's experience and demonstrated competence in managing projects of the scale outlined in the application, including evidence of specific outcomes and outputs;
- e) Where relevant, confirm that the organisation has a Child Protection Policy and that Criminal Records Bureau checks which comply with Safeguarding Legislation and Safer Recruitment Requirements are carried out on all staff working with children;
- f) Set out your organisations total annual income, total annual expenditure and total financial reserves
- g) Include a detailed budget, set out as a spreadsheet or table, which should state clearly the size of the grant being sought as well as the total costs of the project. Key milestones should also be included with an indication of how the grant will be spent as the project progresses. Please note that the first grant payment will not be available until after March 2018. It is advisable to timetable and programme your project accordingly.
- h) Identify key personnel and their roles and responsibilities in delivering the project. If more than one organisation is submitting the bid, the chief contact should be clearly labelled.
- i) Demonstrate how results will be shared and applied;
- j) State what other funds have already been raised or committed for the project;
- k) If already started, what stage has the project reached to date and what has been achieved?
- l) Name any other sources of funding applied for to support the project;  
Supply the names and e-mail addresses of two independent referees;
- m) Finally, please state where you first saw the invitation to bid for Plater Trust funding.**

## 6. Criteria for assessing applications

Eligible applications will be assessed on the following criteria. Applicants are asked to set out what the project will specifically deliver – so that the success of the project (and its use of Plater Trust funds) can be measured at its conclusion. The application should describe the project for which the grant is sought, answering the following questions:

1. What is the need for the project?
2. How will the project address that need?
3. Which theme (see Section 1 above) does the project address and how does it relate to the Plater Trust's mission statement?
4. How have you involved beneficiaries, service users and other stakeholders in formulating your proposals?
5. What is your start-point from which progress on the project will be measured?
6. What are the planned outcomes?
7. How will you demonstrate that change has been achieved?
8. How many people will benefit from these, and how robustly has this been estimated?
9. How will value for money be demonstrated? This would explore how the planned output of the project, and the outcomes it achieves, will represent a good rate of return for the money the Plater Trust invests in the project.
10. How will outcomes and results be applied and shared?
11. What do you plan to do after the grant ends?

## 7. About Plater Trust grant awards

- Funding will be for up to 100 per cent of project costs. With limited funds available, the Trustees have, in the past, awarded three or four grants each year. The grant amount sought from the Trust are typically around £30,000 - £50,000. However, for exceptional projects the Trust may, at its discretion, consider higher levels of funding for an individual application.
- The maximum length of time for a project to be undertaken is two years. Projects longer than this period will not normally be considered.
- Successful applicants will be required to sign an agreement, which will include:
  - The submission of a mid-term report on progress of the grant funded project (normally at the 12-month stage)
  - that the Trustees or their nominated representatives may visit the organisation to assess progress and offer support.
  - that appropriate mention of the Trust be made on all publications produced as a result of the grant, including by use of the Trust's logo. The Trust should be notified in advance that such materials are being produced.
- Where the application for grant funding is made by a consortium or partnership, one of the applicant organisations must be identified as the responsible financial body (lead body) and the key responsibilities must be clearly allocated in the joint

application. Responsibility for submitting narrative and financial reports will rest with the responsible financial body. Dispersal of funds received from the Trust to consortium members or partners for work undertaken on the project will be a requirement of the responsible financial body, not the Trust.

- The Trust will consider applications from organisations seeking to use its grant as match funding as part of a larger project but only if it contributes to an effective delivery of the Trust's objects, reflects its values and relates directly to the current annual theme.
- Recipients will be expected to maintain separate cost centres and accounts for any funds received from the Trust so that expenses can be allocated clearly.
- The Trustees reserve the right to call for written accounts of all projects funded by the Trust at any time upon reasonable notice.
- Successful applicants will be required to delay any publicity about their grant award until after the Trust's annual awards celebration (to be held in February 2019).

## **8. Processing applications to the Trust**

The process for applications to the Trust will be as follows:

- a. All applications will be acknowledged by email shortly after receipt;
- b. Any submissions that do not address a relevant theme will not be considered;
- c. Valid applications will be considered by the Plater Trust's Grant Making Body before being referred to the Trustees for decision;
- d. The Trustees reserve the right to amend the terms and conditions of the grant making process at their discretion and without prior notice. Their decisions will be final;
- e. All applicants will be informed by e-mail once the process is complete; this is expected by early January 2019.
- f. The formal announcement of the awards will be made at the Plater Trust's annual celebration to be held in February 2019.

## **9. How will the grant be paid?**

After confirming the award of the grant to successful organisations, the trust will send an agreement form to be signed by the responsible person for that organisation. On satisfactory completion of the agreement, the Trust will pay the grant in the following stages:

- The organisation will receive 50 % of the total grant at the outset, as start-up assistance for the project.

- A further 40% of the grant will be paid upon receipt of a mid-term progress report setting out progress of the project one year after commencement (or the half way stage for projects of shorter duration). If, at this interim stage, little or no progress has been made, the grant may be rescinded and the initial grant clawed back.
- The final 10 % of the grant awarded will be paid by the Trust upon receipt of an adequate final report. **This must be received by the Trust no later than three months after the project's completion.**

**Organisations should note and take account of this timetable for grant payment for their cash flow and budgeting purposes.**

#### **Document History**

v1 – Initial Draft (9<sup>th</sup> August 2018) following discussions at GMB 31<sup>st</sup> July 2018

v2 – Minor additions (mainly in Section 5 concerning cash flow) 14<sup>th</sup> August 2018