



The Charles Plater Trust

Registered Charity: 309719

Application Guidelines

2019

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

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

This guidance note has been updated from previous years following feedback from past applicants and from the experience of the Trust in assessing past grant applications.

Applications must be sent as an e-mail attachment to plater@plater.org.uk by
5:00pm on Thursday 3rd October 2019

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1. About the Charles Plater Trust

The Trust’s Mission Statement is “*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.*” In other words, “Building greater social justice through education in its broadest sense”.

More information about the Trust can be found on its website 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 major review, the Trust now makes grants each year for projects aligned with any or all of 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 about 40 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 (CST), 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 by **5:00pm on Thursday 3rd October 2019**

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

3.2. The applicant organisation(s) must be based within England and/or Wales and the projects for which funding is sought must also be in England or Wales.

3.3. 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.

3.4. Applications from a consortium or partnership of organisations will be given consideration if the project 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 6 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 and Vulnerable Adults Protection Policy and that Disclosure and Barring Service (DBS) 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;
- m) Supply the names and e-mail addresses of two independent referees;
- n) Finally, please state where you first saw the invitation to bid for Plater Trust funding.

6. Criteria for assessing applications

General Guidance

- Assessment of addressing evidenced need in the context of Catholic Social Teaching (CST) and Plater themes will have primacy.
- It is expected that applicants will demonstrate an understanding of and commitment to the core principles of CST.
- Applications will be assessed against the following criteria. Applicants are required to be clear about **why** the project is necessary, **who** it will benefit, **how** it will be delivered, **what** difference will be achieved and **when and how** will it be sustained.
- Each criterion is important, and omission of any criteria will automatically discount the application. However, if the link between the funds requested and the value to beneficiaries is not explicitly addressed, the application will not be considered. Consequently, and recognising the difficulty of calculating value for money, assessors will consider the level of consideration and analysis undertaken rather than focus exclusively on financial considerations.
- Ethical practice considerations, particularly for academic research - will be assessed where relevant, so should be considered from the outset.
- Applicants should be aware that the standard of applications has been improving year on year and, whilst we recognise that the workload associated with bids diverts practitioners from front line work, investment of time in objective research to provide evidence of need and projected effectiveness of the response to be funded will be essential.

1. Need (why)

Why is the project needed and how effectively is it articulated and evidenced in the context of one of the core Plater Trust themes (Laity leadership/Social Action/Applied Research)?

Applicants should clearly and objectively explain the need for their specific project.

Assessment will be made on a qualitative basis seeking to understand clarity of identified need relevant to the particular operational environment of the applicant, local or national. Assessors will require a detailed appraisal of the target group and expected outcomes to be meaningful, evidenced and supported by robust data.

2. Beneficiary involvement (who)

Has the proposed project involved beneficiaries/service users in its design and delivery model?

How has the applicant involved beneficiaries/service users and stakeholders in preparation of the funding request?

Assessors will be looking for meaningful, relevant and evidenced involvement of beneficiaries and an explicit link between the project and beneficiary outcomes. Where involvement of beneficiaries is problematic sound argument explaining the difficulty should be provided.

3. Response (how)

How does the proposed project address and reduce/mitigate identified need and achieve measurable outcomes?

Assessors will consider project feasibility and whether the applicant has produced evidence of its capacity to undertake the proposal. There needs to be an explicit connection between identified need and the proposed response.

It is important that assessors are able to see how the proposal is distinguished from other projects delivering in the same policy area and/or how it adds to the response? Assessors will expect applicants to have identified and differentiated themselves from other organisations responding to the identified need, including the potential for partnership working with other organisations. Assessors will also examine how far the project reflects Catholic Social Teaching.

4. Impact (what)

How effectively has the applicant defined the baseline/starting point from which the project impact will be assessed and how will they define and demonstrate success? Are the intended outcomes clearly defined?

Assessors will be looking for a clear and realistic definition of a project's start position, from which progress will be measured, supported by clearly defined measures (quantitative and qualitative) of success, i.e. what success would look like. It is important that applicants have undertaken a robust risk assessment and identified events, circumstances, legislation etc which could constrain or impede delivery of the proposed project, combined with what remedial action and contingency is proposed?

A named accountable person is required and assessors will be seeking clarity of how outcomes will be validated combined with a clear, credible statement of beneficiary value and how it has been measured. The application will not be scored if this statement is missing, consequently it should be highlighted in the application. – see general comments and recognition of the difficulty of accurate assessment of value for money

5. Sustainability (when and how)

How does Plater funding enable the applicant to sustain their work to address the identified need after the end of a Plater Trust grant?

Assessors will be looking for commitment to sharing project outcomes and with whom to demonstrate benefit to communities, including in the case of Applied Research projects, how the project contributes to the body of knowledge of applied Catholic Social Teaching

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 (27th August 2019) produced following discussions at the Trust’s Grant Making Body on 22nd August 2019.

V2 – various corrections and front page expanded

V3 – (28th August) further revisions on criteria

V4 – (2nd September 2019) further revisions following consultation with GMB