



# FUNDING STRATEGY

1 January 2019 to 30 June 2022

# The Gannochy Trust Funding Strategy 2019 – 2022

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## About the Gannochy Trust

Arthur Kinmond Bell, the founder of the Gannochy Trust was a noted visionary who delivered his philanthropy with a degree of unassuming reserve. An extremely able businessman, with considerable foresight and acumen, he established the Gannochy Trust in 1937, for charitable and public purposes.

Many of A K Bell's early projects were visionary and ahead of their time. One of his first projects was the building of the Gannochy Housing Estate between 1923 and 1931, a project described by the then Chancellor of the Exchequer, Neville Chamberlain, as 'unique in character and certainly the best I have seen'.

A K Bell's belief, that "after you have a roof over your head and your bread and butter" you should look to invest any surplus for the benefit of your native town, has matured into a lasting legacy that has improved the quality of life of many thousands of people, not only in Perth but all over Scotland.

The full history and more information about the Gannochy Trust can be found on the Trust's website – [www.gannochytrust.org.uk](http://www.gannochytrust.org.uk)

## Funding Strategy and Guidance for 2019 to 2022

The Trust's Funding Strategy and Guidance for 2019 to 2022 has been developed with Trustees, staff, stakeholders and grantees. It has been informed by the external environment of challenging economic times which is having a serious impact on levels of disadvantage, health inequalities, poverty and employment opportunities, especially for young people and research undertaken by the Trust.

In preparation for a new Funding Strategy, the Trust commissioned an independent review to explore the effectiveness of its funding programme. The Trust was keen to hear from grantees about the challenges that they face, what it is that they need from the Gannochy Trust and to consider how we can best support them. The review involved a range of stakeholder questionnaires, interviews and meetings.

The feedback that we received indicated concerns about reductions in funding - grant funding and contract income - from public sector funds and grant-making trusts. Year to year short-term funding had become the norm. Funding was increasingly focused on time-limited project activity, with less funding being made available for core operating costs. This had reduced organisations ability to plan ahead, and increased the burden on fundraising and reporting requirements at a time when demand was increasing.

## What kind of funder do we aim to be?

Over the next three years, the Trust is well placed to contribute to the long-term viability of the organisations that we support.

The Gannochy Trust's funding programme includes many features that make it particularly valuable within the current funding climate. It funds both project and core operating costs and the Trust is prepared to fund organisations that deliver over several years.

The Trust's ongoing commitment to organisations has helped many to survive and others to thrive and develop. However, there is a balance to be struck between providing secure, dependable funding and creating dependency.

The characteristics of the Funding Strategy that are likely to emerge over the next three years are stronger relationships with the organisations that we fund where the Trust's commitment to long-term funding will carry an active expectation of evolution and development in the organisations.

## What the Trust will not fund

To ensure that you do not spend time and effort unduly, there are some things that we do not fund. The list below outlines the areas of work that, while worthy, are excluded from our current funding priorities. **If you are in any doubt about whether your application is an exclusion please do not hesitate to contact the Trust Office for advice.**

Exclusions:	
General appeals for funding	General holidays
Work for the benefit of people outwith Scotland	Minibuses
Applications from statutory bodies or endowment funds	Political activity or lobbying
Work that has already taken place	Feasibility studies (unless initiated by the Trust)
Waste disposal/landfill, pollution control and renewable energy projects	Animal welfare charities
One off events/festivals/conferences which have no element of broader community engagement	
<b>Organisations/Charities that:</b> <ul style="list-style-type: none"> <li>• Are applying on behalf of individuals</li> <li>• Have in excess of 12 months operating costs within their free or designated reserves</li> <li>• Are Umbrella organisations which do not provide a direct service</li> <li>• Collect funds for onward distribution to constituents (unless the project has been initiated by the Trust)</li> </ul>	
<b>Health</b> <ul style="list-style-type: none"> <li>• Hospitals and health authorities</li> <li>• Medical care, research or equipment</li> <li>• Palliative care (except within Perth and Kinross which should be about enhancing provision and not about core care)</li> </ul>	
<b>Education</b> <ul style="list-style-type: none"> <li>• Universities, colleges, schools, student bodies, student unions and the independent education sector (unless the project has been initiated by the Trust)</li> <li>• Academic research</li> <li>• Pre-school groups, play schemes, after school club, holiday club and parent-teacher associations</li> <li>• Individual students or support organisations for personal study, travel or for expeditions, whether in the UK or abroad</li> </ul>	
<b>Faith-based organisations</b> <ul style="list-style-type: none"> <li>• Projects that are solely for the promotion of religion</li> <li>• Building, restoration or conservation of places of worship</li> <li>• Maintenance of faith-based buildings</li> <li>• Enhancement of faith-based buildings. <b><u>The exception will be if it is within Perth and Kinross and its enhancement meets one of the undernoted criteria:</u></b> <ul style="list-style-type: none"> <li>○ Inspiring or investing in young people</li> <li>○ Community outreach projects, services or facilities (that are in addition to the organisation's core activity) and are available to all members of the community particularly disadvantaged and vulnerable people regardless of faith or age.</li> </ul> </li> </ul>	
<b>Scouts and Guides</b> – While Scouts and Guides are not an exclusion, the Trust currently has a strategic relationship with the HQ of both these organisations. Individual Scout and Guide groups/units should contact their HQ organisations directly for further information.	

# Eligibility

## Who we fund

To be eligible for a grant from the Gannochy Trust, you must be a charity that is registered with OSCR, the Office of the Scottish Charity Regulator. Charities that meet OSCR’s legal requirements demonstrate to the public that their assets are properly accounted for and that the charity is being run effectively.

The people and organisations that we are seeking:

- are effective with a proven track record of delivery
- are passionate and inspiring and want to make a difference to peoples’ lives and the communities they support
- will create a culture of aspiration and achievement; develop skills and talent; realise potential
- can demonstrate a real understanding of the challenges facing the groups and communities they support
- can respond creatively and bring stability to challenging situations
- can demonstrate they consult and listen to their beneficiaries

## What we fund

The Trust will consider applications from organisations and projects that clearly demonstrate that they can achieve the aims and outcomes the Trust wants to achieve with its funding. Further information on the outcomes and the type of activity we are likely to fund can be found on Pages 4 and 5.

The Trust aims to fund the most compelling projects or organisations that deliver the outcomes that we hope to achieve with our funding, particularly for young people. The Trust will accept applications from organisations working in areas such as community, sport, culture including art, music and dance, youth work, environment, health and wellbeing and heritage.

The Trust is keen to avoid giving support to organisations that are ‘reinventing the wheel’ by duplicating or replicating the work of others. If you are collaborating with other organisations (formally or informally) please tell us as the Trust is keen to encourage and support collaborative work/partnerships that deliver a better service, improve efficiency and/or effectiveness and lead to better outcomes for young people or the people of Perth and Kinross.

What we would like to achieve with our funding	
Perth and Kinross	The rest of Scotland
<ul style="list-style-type: none"><li>• To <u>improve</u> the Quality of Life for people</li><li>• To <u>develop and inspire</u> young people</li><li>• To <u>improve</u> the availability or quality of the built and natural environment for wide community use</li></ul>	<ul style="list-style-type: none"><li>• To <u>develop and inspire</u> young people</li></ul>

## Where we fund

The Gannochy Trust’s governing document requires the Trust ‘to make a positive difference for the benefit of people living in Scotland, with a preference for Perth and Kinross’. During this funding strategy, the greater percentage of the Trust’s funding will be aimed at groups and organisations within Perth and Kinross.

## How we fund

In order to establish or re-establish a relationship with the Trust, organisations that have not received funding during the past ten years should only apply for one year.

## What we would like to achieve with our funding – Perth and Kinross

The Gannochy Trust is an independent grantmaker, governed by the Trust Deeds which were established by A K Bell in 1937 when he founded the Trust to benefit the population and city of Perth and its immediate environs. In 1967, a Scheme of Alterations was approved by the Court of Session to expand its grant-making footprint to the whole of Scotland, but with a preference for Perth and its environs. **Over the next three years, the Trust aims to increase the amount of funding awarded to groups and organisations within Perth and Kinross. The following aims, outcomes and type of activity outline what the Trust would like to achieve with its funding.**

Perth and Kinross			
Aims: What we would like to achieve with our funding	To <u>improve</u> the Quality of Life for people	To <u>develop</u> and <u>inspire</u> young people	To <u>improve</u> the availability or quality of the built and natural environment for wide community use
Outcomes – the <u>impact</u> (long-term change) the Trust hopes to achieve with our funding:	<ul style="list-style-type: none"> <li>Created positive change in people's lives and communities</li> <li>Increased inclusion, empowerment and independence</li> <li>Increased access to employment, volunteering, education and leisure opportunities</li> <li>Increased equality of opportunity and active citizenship</li> </ul>	<ul style="list-style-type: none"> <li>Increased participation, opportunities and experiences through sport, culture, leisure, environment, heritage</li> <li>Raised aspirations and realisation of full potential</li> <li>Improved access to accredited training and learning</li> <li>Increased employability and employment options</li> <li>Increased leadership or mentoring</li> </ul>	<ul style="list-style-type: none"> <li>Greater access to services and facilities</li> <li>Improved infrastructure</li> <li>More sustainable services and facilities that reflect local priorities</li> <li>Enhancement of the natural and built environment</li> </ul>
<u>The type of activity</u> we are likely to fund:	Programmes of activity - events - advice – support – mentoring – advocacy – community led activity - volunteering opportunities – skills development and accreditation – learning and training opportunities – apprenticeships – peer mentoring – active citizens – pathways and progression routes – leadership and coaching	Programmes of activity – volunteering opportunities – skills development and accreditation – learning and training opportunities - apprenticeships – peer mentors – active citizens – pathways and progression routes – leadership and coaching	Asset purchase (building and land) – new build - refurbishment –regeneration – options and choices appraisals – improved access - equipment
Type of Funding:	Core and Project	Core and Project	Capital
Type of grant available:	Small, Main and Major	Small, Main and Major	Small, Main and Major

## What we would like to achieve with our funding – the Rest of Scotland

Over the next three years, the following funding strand will be open to groups and organisations for work outwith Perth and Kinross:

- ***To develop and inspire young people***

The Trust is particularly interested in supporting direct work with young people who are disadvantaged and vulnerable in communities that have limited access to resources and opportunities.

The Gannochy Trust hopes that all young people will have the chance to develop and succeed. We aim to invest in organisations where inspiring young people is core to their work; supporting and enabling them to thrive despite challenging conditions. The organisations that we are seeking will bring a range of approaches and programmes that are young person centred and capable of delivering measurable outcomes around transferable skills.

It is unlikely that one-off or piecemeal approaches will be awarded funding.

**The Trust considers young people to be aged 25 and under**

***Further information on the types of funding and the level of grant available for Perth and Kinross and the rest of Scotland can be found on Page 6.***

The Rest of Scotland	
<b>Aims</b> - What we would like to achieve with our funding:	<b>To <u>develop</u> and <u>inspire</u> young people</b>
<b>Outcomes</b> – the <b><u>impact</u></b> (long-term change) the Trust hopes to achieve with our funding:	<ul style="list-style-type: none"> <li>• Improved access to accredited training and learning</li> <li>• Increased employability and employment options</li> <li>• Increased leadership or mentoring</li> </ul>
<b><u>The type of activity</u></b> we are likely to fund:	Volunteering opportunities – skills development and accreditation – learning and training opportunities - apprenticeships – peer mentors – active citizens – pathways and progression routes – leadership and coaching
<b>Type of Funding:</b>	Project Only
<b>Type of grant available:</b>	Small and Main Only

## How much can I apply for?

The Trust currently awards around £5m per annum to charitable causes.

There are **three different levels** of grant that you can apply for in order to achieve the aims that we have outlined on the previous two pages.

**Small:** which has a monetary value of up to £10,000 per annum for up to three years. The minimum that can be applied for is £1,000.

**Main:** which has a monetary value of up to £30,000 per annum for up to three years.

**Major (P&K only):** which has a monetary value of over £30,000 per annum for up to three years. **A presentation to Trustees may be required.**

In addition, the Trust can provide **three different types of grant**

**Project Funding:** relates to costs associated with the direct delivery of a specific project or activity which could include: salaries or sessional staff; activity costs, volunteer expenses, transport, training costs and a proportionate contribution to overheads.

**Core Funding (P&K only):** The Trust recognises that core funding (which goes towards the core costs of running an organisation, including salaries, overheads and day to day running costs) can help to: create, maintain and build strong organisations; enable flexibility and responsiveness; and strengthen the sector generally.

The Trust will only consider offering core funding to those organisations that align closely to our strategic objectives. For these organisations there is likely to be a more engaged relationship with the Trust to identify common ground and proportionate arrangements for accountability. **Core funding is only available to those charities which have previously received a grant from the Gannochy Trust.**

**Capital Grants (P&K only):** The Trust's definition of 'Capital' is the creation or improvement of an asset – a new construction, expansion, refurbishment/renovation or replacement. **A presentation to Trustees may be required.**

By their very nature, the number of these grants will vary from year to year as will the monetary amounts approved by the Trustees. Taken over a number of years, the Trustees envisage committing an average of £1.5m per annum to capital projects.

Applications for capital grants can range from the purchase of equipment to the purchase of land and buildings. We expect applicants to have identified other funding sources, therefore, applications should be accompanied by a clear funding plan.

If you are a Community or Village Hall that is not a registered charity and you would like to apply for a capital grant, please contact the Gannochy Trust for Guidance.

**Loans (P&K only):** From time to time, for capital projects, the Trust will consider loan funding if an organisation can demonstrate the ability to meet a repayment plan. If this is the most helpful solution, please contact the Gannochy Trust office for further information.

### **A Rule of Thumb**

The Trust will **not fully** fund organisations, projects or activities. We will expect you to provide details of other funding including a contribution from your own funds or from local fundraising. As a general rule, the Trust will not fund more than 50% of a project or core costs.

# The application process

## When can I apply and how long will it take?

We aim to deal with your application as efficiently and effectively as possible. The Gannochy Trustees meet at least 4 times per annum to consider applications which are assessed on a rolling basis. There are no deadlines - you can submit an application at any time.

We aim to acknowledge your application by email within a week of receiving it and we would expect to notify you of the decision within three to four months. However, complex applications may mean that we have to glean more information from you which could either mean a detailed telephone conversation or occasionally a visit.

## What we are looking for when we assess your application?

The Trust is seeking applications from passionate and inspiring people who aim to make a difference to our target groups - we are not seeking applications which appear 'polished'.

The organisations that are most likely to be funded will be able to demonstrate that they:

- are well led and forward looking
- are clear about the changes they want to make for the people they work with
- are sensitive to the challenges facing the groups and communities that they support
- support positive change in people's lives and communities
- listen and respond

## How likely am I to receive a grant?

The Gannochy Trust expects to receive a far greater number of eligible applications than we can realistically fund with our finite resources. Where possible, we will attempt to give you feedback if your application is unsuccessful, but often it is simply due to the volume of applications. Trustees have to make some difficult decisions which will mean it is likely that many excellent applications will not be successful.

## Why do we ask for Key Outcomes and what does it mean?

In the application form we will ask you to indicate which of the **Trust's outcomes** you hope to achieve with our funding (see pages 4 and 5) eg the difference (impact or long-term change) we want to make. We will also ask you to identify the key indicators or targets that you will deliver in order to achieve the outcome. The reasons for this are that it:

- helps you to express in tangible ways the impact of your work
- enables the Trust to understand and evaluate what we will be funding, and it
- provide us with an agreed framework within which we can each monitor your progress.

In the Guidance Notes for Applicants, you will find links to reliable sources of information on:

- setting and measuring outcomes;
- identifying indicators and evaluation; and
- data collection methods that you can use

You will need these to provide evidence for your report to the Trust at the end of a designated period.



## If you receive a grant what are our expectations?

An award of a grant from the Gannochy Trust will be on the understanding that you have agreed to a number of terms and conditions, the details of which will be sent to you with confirmation of your award.

We ask all grant-holders to report on the progress of their grants so that we can monitor how work is going. This will help us identify useful lessons that will help improve our grant-making, including examples of good practice which can be passed onto others. It will also help us learn from you the things that didn't go to plan and why.

A reporting template based on 'Harmonising Reporting' developed by the Scottish Funders' Forum will be sent to you with your grant agreement letter so that you can start to gather the evidence that you need from the beginning of your funding.

The key outcomes and indicators that you have identified in your application will form the framework of the report.

The Gannochy Trust is keen to learn from grant-holders about the external environment in which they are operating and the changes that are occurring. The report template aims to give you the opportunity to reflect and report on what you have learned. In addition, we aim to hold stakeholder meetings periodically and we may invite you to participate in one of these future events.

### When can I re-apply for funding?

An organisation can normally only have one grant at a time from the Trust. If you have previously been refused funding from us please do not re-apply until at least 12 months after the date of the refusal letter.

### What documents will I need?

If you feel that your application fits the criteria that we have outlined in this Funding Strategy please download the guidance and application forms which can be found within the Grant-making section at [www.gannochytrust.org.uk](http://www.gannochytrust.org.uk)

Applications can be submitted by post or email. To complete an application you will need:

- An Organisation Information Sheet
- An Application Form
- An Aims, Outcomes and Activities Template
- A Budget Template

### Funding Plus

The Trust is currently exploring the possibility of 'Funding Plus' which is the additional non-financial benefit the Trust could provide to current grant holders that would enable the work we fund to have a greater impact.

One of the ways that we currently support organisations is through the use of our facilities. Grant holders are able to use the Trust's Community Hall (capacity 35) and Cricket Pavilion (capacity 50) free of charge for meetings and events.

# Checklist

## Making an application

If you would like to make an application please send us:

**1. A completed Organisation Information Sheet.** You can download this from our website. Please note the Trust is receiving a growing number of applications where a trustee is also a paid employee. The Trust will only accept applications from these organisations if they can demonstrate that there are compelling reasons why it is in the best interest of the charity.

**2. A completed Application Form and Aims, Outcomes and Activities Summary.** Please make sure that you complete all of the questions contained within the application. This will ensure that we understand your organisation, the context in which you are working and what you hope to achieve with our funding. Guidance on the information we are looking for under each section is contained in the **Guidance Notes for Applicants** on our website. The Declaration must be signed by the Chair, Vice Chair, Treasurer or Secretary.

**3. A completed Budget Template.** Guidance on the template is contained in the **Guidance Notes for Applicants** which can be found on our website. The information provided should be relevant to the specific project (if project funding is being sought) or the core and running costs (if core funding is being sought).

**4. A copy of your most recent signed annual accounts.** The Trust recognises that if you are a new and emerging organisation you may not have the documentation and records of established organisations. If your organisation is in this position, please send a copy of your constitution or governing document together with a **photocopy** of a recent bank statement and a projected cash flow statement for the first year.

**5. A job description** whether this is a new or existing post.

**6. Relevant evaluations or business plans** which support your application.

## 7. Capital Projects (only within Perth and Kinross)

Pre-Application – completion of a 2-page Project Summary for initial consideration and feedback by Trustees Once you have been given the go ahead to develop your application for submission to the Trust, we will need:

- Application – a full application and the undernoted additional information is required:
  - Information on the current title or lease of the building or land and any plans regarding the future of the title.
  - Approval/confirmation from the landlord (if the property or the land is not owned by the organisation/project).
  - Information/evidence of how the local community would benefit from the project and the groups/numbers involved.
  - Justification and/or evidence that such additional or new community space is required and not available elsewhere, and is not to the detriment of other community venues or facilities.
  - Plans (preferably A4 or A3) and fully costed specifications of the proposed works.

For further information or advice please contact us at:

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