The Gannochy Trust

Grant Strategy 2022 to 2027

v4 July 2025 update

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V3

Introduction

About the Gannochy Trust

Arthur Kinmond Bell was an extremely able businessman with considerable foresight and acumen. His vision for philanthropy was ahead of his time and by establishing The Gannochy Trust in 1937, he brought benefits to Perthshire and Scotland which are maintained to this day. AK Bell transferred considerable property to the Trust including the Gannochy housing estate and substantial other grounds totalling 700 acres for agriculture, community, and recreational purposes; these remain a key focus of our activity. The Trust's funds also included shares in the Bell's Whisky Company, which were latterly invested prudently over a wide spectrum of investments and have grown significantly over the years, allowing approximately £5m of grants to be awarded annually. In 1967, the geographic footprint of the Trust's grant making was widened and now encompasses the whole of Scotland, although a particular focus remains on Perth and Kinross in accordance with AK Bell's wishes. The full history and more information about The Gannochy Trust can be found on the Trust's website – www.gannochytrust.org.uk

The diversity of the Trust's activity is reflected in our current strategic plan which is driven by AK Bell's ambitions as set out in the original Trust Deed, and which we have the responsibility of putting into a modern-day context. The five pillars of our strategy are:

- Striving for excellence – building and deploying knowledge and effective delivery;
- Improving lives – through our housing, community, and grants;
- Enhancing the environment – improving buildings and natural habitats on our estate and encouraging more people to enjoy our green spaces;
- Building resilience and sustainability – ensuring a thriving local charity sector, through collaboration and successful partnerships; and
- Supporting Perth and Kinross to recover and thrive – understanding local needs and investing well in place, people, and partners.

Grant Strategy for 2022 to 2027

The Trust's Grant Strategy for 2022 to 2027 supports the delivery of our strategic plan and has been informed by an external environment of unprecedented challenges which are having a serious impact on levels of disadvantage, wellbeing, mental health, poverty, and employment opportunities, especially for young people. Over the next five years, the Trust aims to contribute to the long-term viability of the organisations that we support, and build strong relationships with those that can demonstrate consistent and high-quality delivery of our funding priorities. The Trust's grants programme includes many features that make it particularly valuable within the current climate including core, project and capital funding, alongside organisational development and training through Grants Plus. The Trust is also prepared to fund organisations over several years.

Eligibility

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. By meeting OSCR's legal requirements, registered charities demonstrate to the public that their assets are properly accounted for and that they are being run effectively. The Trust has identified a number of funding priorities for our grant making and therefore there are certain activities that we do not fund which are set out in the Exclusions section at the end of this document.

Organisations that we want to support

We want to support organisations that share our mission of improving lives and supporting communities and can demonstrate that they make a real difference. We value an established track record, successful current work, and ambitious new ideas. We want to be confident that you understand the needs of those that you are supporting, and that you have consulted or listened to them appropriately to shape your plans. We are also keen to support collaborative work and partnerships between organisations to deliver more effective and efficient services. Those that we provide grants to will inspire us with confidence and with their passion for the work and sectors in which they are the specialists. We aspire to be enablers of your work in delivering a shared desire to support our communities and improve lives.

What and where we fund

The Trust will support applications from organisations and projects that clearly demonstrate that they can deliver the aims that the Trust wants to achieve with its funding. The Trust's governing document requires our funding to be for the benefit of people living in Scotland with a preference for Perth and Kinross, therefore this is reflected in our aims and the level of grant available within each area. Further detailed information is set out on the next page.

Aims and outcomes

We have different criteria for charities working in Perth and Kinross, than those across Scotland. We intend to fund charities to deliver the following aims and outcomes:

	Perth and Kinross			Rest of Scotland
The aims of our grant making	**To improve the quality of life**	**To improve the availability or quality of the built and natural environment for wide community use**	**To develop and inspire children and young people (From age 0 to 21 inclusive)**	**To develop and inspire young people (From age 11 to 21 inclusive)**
The outcomes that we expect	At least one of these: • Positive change in people's lives and communities. • Increased inclusion, enablement, independence, mental health and wellbeing. • Increased access to employment, volunteering, learning, culture, sport, and leisure opportunities. • Increased equality of opportunity and active citizenship.	At least one of these: • Greater access to services and facilities. • Improved infrastructure. • More sustainable services and facilities that reflect local priorities.	At least one of these: • Increased participation, opportunities and experiences through culture, leisure, play, environment, and heritage. • Increased access to sporting opportunities at all levels of participation and ability. • Increased leadership or mentoring. • Accredited non-formal learning through voluntary activity in the community.	At least one of these: We want to focus on quality work with young people to deliver: • Increased peer leadership or peer mentoring. • Better employment options that can be measured. • Accredited non-formal learning through voluntary activity in the community. Programmes that lead to improved mental health or wellbeing are particularly encouraged.
Levels of Grant	**Small, Main and Major**	**Small, Main and Major**	**Small, Main and Major**	**Small**
Types of Funding	**Project and Core**	**Project, Core and Capital**	**Project and Core**	**Project only**

Levels of Grant and Types of Funding available

Levels of Grant	Geographical Areas: Perth and Kinross	Geographical Areas: Rest of Scotland
Small: £1,000 - £10,000 per annum for up to three years	✓	✓
Main: £10,001 - £30,000 per annum for up to three years	✓	x
Major: £30,001 & over per annum for up to three years	✓	x

Types of Funding	Perth and Kinross	Rest of Scotland
Project: 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: The Trust recognises that the core costs of running an organisation can help to create, maintain, and build strong organisations; enable flexibility and responsiveness; and strengthen the sector generally. Core costs might include salaries, overheads and day to day operational running costs but are not restricted to these. The Trust will consider core grant applications from charities which have been a grant recipient within the last three years and therefore have an established relationship with the Trust. New applicants who have not previously received funding are expected to apply for project funding in the first instance.	✓	x
Capital: Applications for capital grants could include: • the purchase of equipment • the purchase of land and/or buildings • the costs associated with the creation or improvement of an asset – a new construction, expansion, refurbishment/renovation or replacement. Applications for capital funding will go through a two-stage process. Please download and complete the Stage 1 Project Summary Report and email to grants@gannochytrust.org.uk We will then review your submission and decide if your project will progress to Stage 2 – which is submission of a full funding application.	✓	x
Loans: 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 Trust Office for further information.	✓	x

Additional Information

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 within Perth and Kinross, and 30% of project costs within the Rest of Scotland.

In order to establish or re-establish a relationship with The Gannochy Trust, organisations that are applying to the Trust for the first time or which have not received funding during the past ten years should only apply for one year project funding. If you are not sure if you fall into this category, please contact the Trust for assistance.

A charity can normally only hold one grant at a time from the Trust. In exceptional circumstances we will consider additional grants within Perth and Kinross (e.g. concurrent core/project/capital funding) and charities considering this should discuss their proposals with the Trust prior to beginning an application.

If you have previously been refused funding, please do not re-apply until at least 12 months after the date of the refusal letter/email.

Scouts and Guides – The Gannochy 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.

Capital grants – We expect applicants to have identified other funding sources, therefore, applications should be accompanied by a clear funding and business plan. If you are a Community or Village Hall (within Perth and Kinross) that is not a registered charity and you would like to apply for a capital grant, please contact the Trust for guidance.

Grants Plus

Through our work on Grants Plus, we aim to support charities by offering organisational and governance development opportunities in addition to our grant making. These opportunities are delivered by external specialists and have included strategy development, fundraising, sustainability, and evaluation skills enhancement. We also work with partners to develop sector networking and collaboration events and opportunities. The programme evolves constantly in response to identified need. Please visit https://www.gannochytrust.org.uk/our-grants/grants-plus to see our current programme.

Youth Panel Fund

The Trust has introduced a separate Youth Panel Fund developed by 12 young people aged from 14 to 21 and recruited through Perth and Kinross Strategic Youth Work Partners and care experienced youth services. The Youth Panel has designed the Fund aims and outcomes and have delegated responsibility from the Board of Trustees for assessing applications and approving funding of up to £100,000 per year. Beneficiaries of a Youth Panel grant must be resident in Perth and Kinross and aged from 11 to 26 (inclusive). The Youth Panel will meet four times each year with a budget of circa £25,000 at each meeting. Visit the Youth Panel Fund page on www.gannochytrust.org.uk to find out more.

Exclusions

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 have any doubt about whether your work falls into an exclusion area please contact the Trust Office for advice.

General

- Applications from individuals
- Work for the benefit of people out with Scotland
- Applications from statutory bodies or endowment funds
- Anything that is considered a statutory provision in health and education
- Universities, academic research, colleges, schools, and the independent education sector (unless the project has been initiated by the Trust)
- Medical care, research, or equipment (with the exception of palliative care in Perth and Kinross)
- Political activity or lobbying
- Projects that are solely for the promotion of religion
- Enhancement of faith-based buildings. The exception will be if it is within Perth and Kinross and its enhancement meets one of the undernoted criteria:
    - Developing and inspiring children and young people
    - Make community outreach projects, services, or facilities (that are in addition to the organisation's core activity) available to all members of the community, particularly disadvantaged and vulnerable people regardless of faith or age
- Animal welfare charities
- Minibuses
- Retrospective funding

Organisations/Charities that:

- Are applying on behalf of named individuals
- Have an excess of operating costs within their free reserves (typically more than 12 months)
- Are Umbrella organisations which do not provide a direct service
- Collect funds for onward distribution to constituents (unless the project has been initiated by the Trust)

The Gannochy Trust

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