



Grant Appeal Guidelines

The Roger & Douglas Turner Charitable Trust makes grants to Registered Charities within our beneficial area: Birmingham, the Black Country (Wolverhampton, Sandwell, Walsall, and Dudley), Worcestershire and Herefordshire. These Registered Charities are normally based in our beneficial area.

The key sectors we support are Children & Young People, Health & Disabilities, Community, Social Support and Hospices with limited support for Environment & Heritage and The Arts.

Appeals will only be considered from charities that have been fully operational for a minimum of 3 years and all appeals must be accompanied by accounts no older than 18 months prior to submission. Grants are awarded for use by the wider public and not for small inclusive groups.

Applications are now only considered from national charities that have a registered or headquarters address in our beneficial area and can demonstrate specific work in our beneficial area. However, there is one exception to this guidance: national charities that have received at least one grant from us in the last two calendar years may still submit an appeal for trustees' consideration.

The Trust does not give grants to Individuals, Community Interest Companies, Social Enterprises, or other Not-For-Profit Organisations.

Charities with large investment portfolios, defined-benefit pension fund deficits, excessive reserves, high levels of overheads or fundraising costs are generally not supported.

The Trustees usually meet in March, July and November and our website shows submission deadlines for appeals. Late or incomplete appeals are carried over to the next meeting but will be discarded if any outstanding information is not received within a year of the date of the appeal.

Appeals can be for core costs but those from new beneficiaries should generally not exceed £5,000. Appeals for larger capital or other projects may be considered (principally from applicants previously known to us) once a project's financial viability is clear; we do not commit to future funding.

Any registered charity wishing to appeal with mitigating factors that fall outside of our guidelines must contact the Grant Officer prior to submitting an appeal.

Application forms are available through our website www.turnertrust.co.uk. Applications are acknowledged on receipt and the decision is notified after the relevant meeting. The Trustees' decisions are final, and they do not generally give a reason why an appeal is supported or declined.



Along with your application form please send, preferably in PDF format:

1. A short, supplementary letter (not more than two pages) on letter heading to explain the appeal in more detail.
2. Signed accounts, which should generally be for a period ended no earlier than 18 months prior to the date of the application. For charities below the submission threshold, the latest set of annual accounts should be sent with the application. Trustees may not be able to reach a decision based on old financial data.
3. A copy of a bank giro credit or bank statement to minimise the risk of fraud, error, or mistake.
4. A short explanation of any reportable incidents to the Charity Commission, where applicable.

You must ensure all sections of the application form are completed and specify the amount you are appealing for otherwise your appeal will be referred back to you. Any incomplete appeals will be held for 12 months, and failure to resubmit will result in the appeal being destroyed.

Completed application forms should be emailed to grants@turnertrust.co.uk. We do not accept appeals through the post.



FAQ

When can we apply?

Applications can be made at any time throughout the year. Please check our deadline dates on the Grant Award Deadlines page, although earlier submission is encouraged.

How often can we apply?

Charities can apply once in every calendar year.

Who can apply?

Registered charities that can demonstrate specific charitable work and public benefit in Birmingham, the 4 boroughs of the Black Country (Walsall, Sandwell, Wolverhampton & Dudley), Worcestershire and Herefordshire providing support in any of the following key sectors: Children & Young People; Disabled & Health; Environment & Heritage; The Arts; Work in the Community & the Elderly; Social Support and Hospices. These registered charities are normally based in our beneficial area.

Can national charities apply?

Applications are now only considered from national charities that have a registered or headquarters address in our beneficial area and can demonstrate specific work in our beneficial area. However, there is one exception to this guidance: national charities that have received at least one grant from us in the last two calendar years may still submit an appeal for trustees' consideration.

What can we appeal for?

Charities can appeal for core funding or a project/capital appeal.

What documents are required with the application form?

A supporting letter (generally no longer than 2 pages) giving details of your charity and your appeal, accounts no older than 18 months* prior to your appeal are attached to the email, and confirmation of your bank details (see below for acceptable documents). All documents are preferred in PDF format.

**For example, accounts for the year ended 31 December 2023 can only be used for applications submitted before 30 June 2025.*

Which documents are suitable to confirm your bank details?

A scanned copy of either a (i) Bank Giro Credit (paying in slip) or (ii) a cheque book or (iii) a bank statement. A transaction listing is not suitable.

Why do we have to provide a document to prove our bank details?

To ensure that we use accurate and current bank details for internet payments.

How much can we apply for?

Most grants made are generally between £1,000 and £5,000. Larger grants may be considered for our regular beneficiaries and capital projects.



If our application is successful, when will we know?

We advise our successful applicants within two weeks of the Trustees meeting.

If our application is rejected, can we reapply?

Charities can reapply once in every calendar year, and normally after approximately 12 months have expired since the last application.

Do you have an appeals process for rejected applications?

We do not have an appeals process and the Trustees decision is final.

Can I get feedback on why our application is refused?

The Trustees do not give reasons why an application is declined.

How does a charity become a regular beneficiary?

To qualify as a regular beneficiary, a charity must have 4 years of consecutive grant awards. These charities are usually visited (on-site or by video call, as appropriate) on a biennial basis.

Who cannot apply:

- Individuals and non-registered charities.
- Charities that are primarily grant paying.
- Community Interest Companies.
- Social Enterprise and other not-for-profit organisations.
- New charities that have not been fully operational for at least 3 years.
- Charities that are not involved in one of the key sectors that we support.

The following are unlikely to have a successful appeal:

- Charities with large investment portfolios and/or excessive reserves.
- Charities with large defined-benefit pension fund deficits.
- National charities not meeting the specific criteria noted above.
- Charities that do not submit recent accounts with their appeal, as above.
- Charities with high levels of scientific and/or medical research.
- Charities with relatively high costs of raising funds or overheads.
- Charities with governance issues (such as late or incorrect accounts).