

Clive Richards
Foundation
Making a Difference

CLIVE RICHARDS FOUNDATION (CRF)

Charity No 327155

GUIDANCE FOR APPLICANTS

WHO MAY APPLY?

- The Charity was established in May 1986 by Clive Richards a successful entrepreneur and philanthropist and has evolved since then. Formerly known as the Clive and Sylvia Richards Charity, in 2022 it was renamed the **Clive Richards Foundation**.
- It currently donates between £500,000 and £1.5 million per annum. The broad division of donations can be seen to be allocated to Education (35%), Medical including hospitals and hospices (35%), Heritage (15%) and Arts (15%). These percentages are not fixed and the Trustees may vary the percentage from year to year.
- The Foundation prefers to focus on smaller charities or projects where if the CRF was not involved it probably would not happen. The 'strap line' of "making a difference" is a strong indication of what the Trustees favour. There is generally an upper limit of £100,000 in any one year to any one beneficiary.
- There is a geographic limit to who can apply, namely within 100 miles (as the crow flies/in a straight line) of the centre of Hereford, Herefordshire, UK.
- We do not usually make grants towards operating costs (i.e. revenue costs, salaries, etc) or expenditure that is or was the responsibility of statutory organisations such as Local Authorities and we do not support National Charities.
- We support gifted students for educational purposes via a Bursary Scheme for Colleges and 6th Forms and no longer support students directly.
- Overseas - We will only support overseas applications from English speaking countries restricted to Africa and India, and they must have a UK based representative/contact.

WHEN MAY APPLICATIONS BE SUBMITTED?

- General UK based applications may be submitted at any time by charities, schools, groups, colleges etc and individuals (excluding individuals for educational purposes or living costs/debt etc).
- Research Grant applications may be submitted at any time.
- Applications from overseas based organisations/groups may be submitted at any time but **will not** be considered without a UK contact/representative.

- All applications must be made via the process shown on our website. Any tick boxes shown on the relevant pages reflect eligibility requirements.
- A direct request for funding via post or email will be rejected.

Further and future applications may be submitted but there must be at least 12 months' gap from the result of the previous application and it must be for a different project.

WHAT INFORMATION MUST BE PROVIDED?

INITIAL ENQUIRY

Please complete the basic initial tick box request found on the Clive Richards Foundation website under 'How to Apply' www.cliverichardsfoundation.com

Once this is received and agreed that you appear to be eligible to apply for funding, we then have a two stage application process:-

Stage 1

We will email you the relevant Application Form. There are currently 4 types of application namely:

- A. **UK organisation/group or individual** (e.g. groups, bodies, schools, educational establishments, charities or individual person, etc). We do not cover operational costs i.e. running costs, including salaries, rents, etc.
- B. **Research** as long as you are not part of a National Charity.
- C. **Bursary** (e.g. a Sixth Form or College wishing to support an outgoing/ departing student who is taking further or higher education elsewhere). The applying 6th Form/College must be based within our geographical location. The student they wish to award the bursary to must be attending an educational establishment somewhere within the UK.
- D. **Overseas based organisation/group** (e.g. where the groups, bodies, schools, educational establishments, charities, etc are primarily based **overseas** in English speaking countries - currently restricted to Africa and India). **Please note:** an **overseas** application will **not be considered** without a **UK contact/representative/sponsor** whom the Trustees may wish to meet if your application progresses further.

The forms for A, B & D above will require you to submit a brief summary of your organisation, a description of the project to be funded, including the total cost, the amount requested (in sterling/GBP £) and information of the proposed timescale would be helpful. Any payments we may award will be paid into a UK bank account electronically in GBP £.

General Guidance for completing the Forms You will be restricted as to how much information you can enter in the boxes on the Application Forms. This is relevant because the forms are printed and handed to the Trustees. If you type beyond the box, no-one will see what you are adding. Whilst you may feel that there is not much room to give sufficient information to the Trustees, they only need a basic idea of the project. If they need to see more information it will be requested.

Covering emails are not printed for circulation to trustees and neither are additional sheets of paper – only the relevant application form should be sent to us.

Please **DO NOT** send any other paperwork such as accounts or brochures at this stage.

Based upon the information provided, a decision will be made whether or not to invite a full application i.e. Stage 2.

This will be made at a monthly meeting attended by 2 Trustees and you will be notified as soon as possible. If your application is rejected at this stage, we do not have to give any reason as we have limited funds and have to assess on a case by case basis.

Full Trustee meetings are held every 2 months and only Stage 2 applications will be considered by the full Board of Trustees.

Stage 2 - by Trustee request only

A. For Stage 2, **UK organisation/group, UK individual application** and **overseas based organisation/group** will be invited by the Trustees to provide further information in a format which is most convenient for them but the information requested could include any of the following details (but is not limited to):

- Contact name, address, telephone number and e-mail
- Financial background (for individuals) with supporting documentation.
- A brief description of the organisation, its objects and its history and development.
- The number of members/users, their age range and any membership fees paid. If there is a constitution, please include a copy.
- A full account of the purpose of the project for which a grant is requested and a clear indication of the amount of financial support being requested. It is important to demonstrate that you need a grant and that it will provide important benefits.
- Accurate costings (**in GBP £**), showing where appropriate that the applicant has obtained reasonable estimates from a range of sources. **No additional sums will be granted if estimates prove to be inadequate.**
- Whether VAT is included in the estimated costs. (VAT will not be applicable to **overseas** based organisation/groups and some organisations may be exempt from VAT or are able to recover VAT payments). It is the applicant's responsibility to check with Customs and Excise or, in the case of schools, the Education Authority, if in any doubt. **Organisations cannot claim additional amounts to cover VAT after the application has been approved.**
- CRF does **not** wish to be the sole or main funder and will always be seeking co-funding.
- Other sources of funding must be clearly shown. For example, funds being contributed by the applicant or bids for funding from charities, lotteries, local authority, parents' groups etc. If an award from CRF does not enable you to fund the whole project, what is your business or strategic plan for raising further amounts?
- A copy of the latest audited accounts or, for very small organisations, a copy of the latest bank statement.

Accounts should be:

| | |
|---|--|
| 1 | As up-to-date and accurate as possible (usually no more than 9 months old) |
| 2 | Suitably detailed as well as showing a clear summary of income, expenditure and balances. |
| 3 | Accompanied by notes explaining any likely queries (e.g. significant surpluses, reserves, loans, creditors, other present and future commitments, deficits) |
| 4 | A post-audit statement if accounts are several months old, indicating any financial changes or developments since the audit. |
| 5 | A business plan going forward for 3 years with a detailed budget for the current year and management accounts for the year to date. |

- **The importance of submitting meaningful and clear accounts cannot be overstressed. The Charity will not consider making an award unless this request is satisfied.**
- For school projects, the Trustees may want to see the annual budget out-turn statement, showing any carry forward surplus or deficit. They also want to see details of the current year's total income, budget, expenditure and forecast of likely carry forward or or deficit balances.
- For Organisations - A copy of your main **policies**, to give the Trustees confidence in your legal & regulatory compliance and adoption of best practice. These may be emailed as PDFs for Stage 2.
- It may also be helpful if you are able to provide your UK Bank details i.e. bank name and address, sort code, account number and account name for payment of any awarded funds.
- The covering letter should confirm the full commitment of the organisation to the project and should be signed by the chief executive (or equivalent).

B. Stage 2 **Bursary applications**

- A trustee will arrange to visit the school to discuss the potential grant and commitment further.
- Any funding awarded under this scheme would be paid in respect of the successful student (£3,000 per year for 2-5 years depending on their educational plan). Termly reports would be expected from the student and if these are not received in a timely manner, funding could be discontinued at the Trustees' sole discretion.
- The Trustees would at some stage meet the successful student.
- As each supported student could cost up to £15,000 we are restricted on the number we can commit to. If all bursary funds are taken up this will be reflected on the website and further applications will not be possible until previous commitments are completed.

HOW ARE APPLICATIONS PROCESSED?

- We acknowledge receipt of all applications received by email and they will be allocated a unique reference number. **Please do not telephone** to find out the progress of your application.
- If you request £50,000 or more, we may ask you to present your application to the Trustees in person where they can ask you questions. We can only accommodate 2 presentations at any one Board Meeting.
- Trustees receive a clear written summary of the applications being considered including copies of accounts and relevant papers 7-14 days before each meeting.
- All decisions are taken by the Trustees, who will make one of the following responses:
 - a) award a full grant
 - b) award a proportion of the sum requested
 - c) defer any award pending further information
 - d) decline the application

The decision of the Trustees is communicated to the applicant in writing as soon as possible after the meeting together with arrangements for claiming the grant and timings.

If your application is successful and we make a grant/donation to you, it is given on the agreement that you will:

- a) allow us to publicise details of our support on our website.
- b) give us suitable recognition to our donation in any publicity material, reports etc.
- c) provide us with suitable photographs (by email) which we can add to our website including a short statement on how our donation has helped you.
- d) invite the Trustees to any official launch/opening event

The Trustees' decision is final. Please do not telephone for an update after the Trustee meeting, as you will be notified of the outcome as soon as possible.

Please do not re-apply for funding within 12 months of receiving the result of any previous application made by you.

OTHER MATTERS

- Details of each application are confidential. The Foundation will make no public comment about applications received or being processed. Organisations are asked to observe similar decorum.
- The income available for grant-making is derived from investments, rents and gifts from the Clive Richards Foundation and therefore varies from year to year. Grants are made from surplus funds. We receive more applications than we are able to fund.
- Details of the Foundation's aims and activities are published in the Annual Report, and on the website along with a full list of grants awarded. Details are also sent to the local press and to the Charity Commission.

*If an application is approved, the organisation will be sent full details about arrangements for claiming the grant. **We do not make cash payments.***

It is normal procedure for the CRF to pay contractors' invoices after receiving confirmation that goods or services have been satisfactorily received. In exceptional circumstances, an organisation can apply for reimbursement if it can demonstrate that it has paid an account from its own funds and can supply copies of the original invoices and evidence of payment. It is essential that organisations have all invoices made out in their name, not in the name of the CRF.

**Completed Stage 1 Application forms should be emailed to
Caren via admin@cliverichardsfoundation.com**

If you have any general enquiries about eligibility, please contact Caren or Rob via email. They will be happy to assist and please ensure you include your telephone number.

PRÉCIS OF AN APPLICATION TO THE CLIVE RICHARDS FOUNDATION

| ACTION | RESULT | RESULT |
|--|---|--|
| Initial application enquiry via website (tick box declarations) | Eligible - send full Application form | Not eligible Notify of result and END |
| Completed form received back All forms collated for that month | Considered by 2 Trustees 2 weeks following the previous month | |
| After the initial Trustee meeting | Approved to proceed to Stage 2 and further info requested | Not approved Notify of result and END |
| Further information received back. For projects of £50,000 or over, invited to make presentation to the Trustees (we can only accommodate 2 presentations per Board Meeting) | Considered by all Trustees at Board Meeting including presentations by invited applicants | |
| After the Board meeting | Award agreed in full | Notify successful and discuss payment arrangements |
| | Award agreed in part | Notify partially successful and discuss payment arrangements |
| | Defer pending further information being received | Deferred until decision can be reached |
| | Decline application | Not approved Notify of result |