

Guidelines for making an application to The Robertson Trust

The Robertson Trust was established in 1961 by the three Robertson sisters to provide financial support for charities as defined by the Law of Scotland. This enables the Trustees to donate to a wide range of charitable objects and activities, which take place in, or have a direct impact on Scotland. To achieve an effective distribution of funds, the Trustees establish policies and priorities for funding, which are reviewed every two years.

The following guidelines are current as of December 2006.

PRIORITY AREAS

The Trust has four priority areas which are:

Health

This category includes activities which promote health, as well as those which seek to prevent or treat sickness and disease. Medical research is no longer directly supported by the Trust, but applications will be considered from Research Institutes and Centres of Excellence, where there is a direct and immediate benefit to patient care. The category includes services for people with drug and alcohol addictions, with a particular emphasis on projects which work with children who are at risk of misusing drugs or alcohol, or with recovering addicts to assist them to rebuild their lives.

Care

This category is broadly defined. Examples include palliative care, care for older people, people with disabilities, people with mental health issues, people who are homeless and offenders and their families. Support is given to charities working at both local and national level.

Education & Training

This category includes support for community-based education activities, capital projects at educational establishments and provision for people with special educational needs. The Trust is particularly interested in supporting projects, which develop recognised Centres of Excellence, increase access and opportunity, and contribute to the growth of the Scottish economy. Core revenue costs for nurseries, schools and after-school groups are not usually considered.

Community Arts & Sport

This category is primarily aimed at encouraging young people to participate in artistic and sporting activities within their local community. The Trust is particularly interested in supporting activities which increase the use of existing facilities. However, capital projects which seek to widen opportunity, access and participation, as well as improve provision, will also be considered.

While these priority areas account for a minimum of 40% of the Trust's expenditure each year, applications will be considered from most other areas of charitable activity, including:

- ◆ work with children, young people and families
- ◆ preservation of the environment
- ◆ the strengthening of local communities
- ◆ the development of culture, heritage and science
- ◆ animal welfare and the saving of lives

However, there are a number of types of activity, which the Trustees have currently chosen not to, or are unlikely to support. These are shown below —

What the Trust does NOT support

- ◆ Donations to individuals or to organisations that are not recognised as charities by the Office of the Scottish Charity Regulator (OSCR)
- ◆ General appeals and circulars including contributions to endowment funds
- ◆ Local charities whose work takes place outwith Scotland
- ◆ Projects which are exclusively or primarily intended to promote political or religious beliefs
- ◆ Students or organisations for personal study, travel or for expeditions whether in the United Kingdom or abroad
- ◆ Organisations and projects whose primary object is to provide a counselling, advocacy, advice and/or information service

The Trust is also unlikely to support

- ◆ Charities which collect funds for onward distribution to others
- ◆ Umbrella groups which do not provide a direct service to individuals e.g. CVS, Feasibility Studies and other research
- ◆ Charities already in receipt of a current donation from the Trust

TYPES OF DONATION

The Robertson Trust currently disburses around £7 million per year in donations. There are no minimum or maximum donations, but the following information should be noted.

Donations are classified according to three main types, to which different guidelines apply.

Small Donations comprise revenue donations of up to £5,000 and capital donations of up to £10,000. The application process is designed to be straight-forward and this is an ideal starting point for charities who have done little fundraising before or those with one-off funding appeals.

Major Capital Donations comprise capital donations in excess of £100,000, for which the overall project costs will normally be in excess of £1 million. Major capital donations will contribute specifically to one of the Trust's priority areas other than where an exceptional case is made. Applications will be considered twice a year, in January and July, to allow the Trustees to compare the merits of different applications. Organisations considering applying for a major donation are advised to telephone the Trust beforehand for an informal discussion.

Main Donations comprise revenue donations in excess of £5,000 and capital donations of between £10,000 and £100,000. Revenue grants rarely exceed £15,000 a year and may be for core or project funding for a maximum initial period of 3 years. Capital donations will be for a maximum of 10% of the total project cost.

HOW TO APPLY FOR A DONATION

The Robertson Trust does not have an application form. We invite application by letter to enable applicants to express themselves in their own words without the restrictions of set questions.

However, there are certain details which you will need to include in your application to enable the Trust to make an informed decision on whether or not to fund your organisation.

- ◆ Brief description of the organisation, including past developments and successes
- ◆ Description of the project – what do you want to do, who will be involved, where will it take place and how will it be managed?
- ◆ How have you identified the need for this work?
- ◆ What do you hope will be the outputs and outcomes of this work? What key targets have you set?
- ◆ How do you intend to monitor and evaluate the work so that you know whether or not you have been successful?
- ◆ What is the income and expenditure budget for this piece of work?
- ◆ How you propose to fund the work? Please include details of funds already raised or applied for.
- ◆ What is your proposed timetable?

In addition the Trust will also require three supporting documents. These are:

- 1 A completed copy of the Organisation Information Sheet, which is available from the Trust's website or the Trust Office.
- 2 A copy of your most recent Annual Report and Accounts. These should have been independently examined or audited.
- 3 A Job Description, if you are applying for salary costs for a specified worker

Please do NOT send a constitution or Memorandum and Articles. If you have other bulky information which you feel may be relevant, such as a Feasibility Study, Business Plan or Evaluation, then please refer to it in your application, so that the Assessment Team can request it if required.

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ASSESSMENT PROCESS

The Trustees meet every two months usually in May, July, September, November, January and March.

The Trust does not publish deadlines for each meeting and you are advised to submit your application when it is ready.

The Assessment Team tries to process applications as soon as possible and in most circumstances you should not have to wait more than three months. You may be contacted by a member of the Assessment Team for more information or to arrange a visit.

Please note that the application process for Major Capital Donations is different, as these applications are only considered twice a year by the Trustees at their January and July meetings.

As with other charitable trusts, The Robertson Trust always receives more applications than it has funds to support. Even if the project falls within the guidelines and a detailed assessment has been made, the Trust may still be unable to make a donation. Organisations that have been unsuccessful must wait 12 months before submitting a further application to the Trust.

Contact Details

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or Anne Pearson, Assessor

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