



The Charles Plater Trust

Registered Charity: 309719

Application Guidelines

2021

The Trust welcomes applications for grant funding for projects in any of the following three fields:

- *Leadership for lay people*
- *Social Action*
- *Applied Research*

This guidance note has been updated from previous years following feedback from past applicants and from the experience of the Trust in assessing past grant applications. It aims to be user-friendly, and to reflect our commitment to be a flexible and proportionate funder for applicants.

Applications must be [submitted online](#) / or sent as an e-mail attachment to plater@plater.org.uk by

5:00pm on Friday 15th October 2021

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1. About the Charles Plater Trust

The Trust’s Mission Statement is *“The Plater Trust enables people to learn how the way we live and work can become more fully human in the light of the Gospel and the application of Catholic Social Teaching.”* In other words, all our work as a funder is designed to “build greater social justice through education in its broadest sense”.

More information about the Trust can be found on its website www.plater.org.uk

The Plater Trust grants funding to recipients that best support the mission and values of Fr. Charles Plater and of the former Plater College. Following a major review in 2016, the Trust now makes grants each year for projects aligned with any or all of three themes:

- **Leadership for lay people**

Proposals for grant aid should be aimed at deepening the awareness of Catholic Social Teaching and Thought to better equip people to take on leadership roles in tackling poverty, exclusion, economic inequality, or environmental concerns, both within and outside the Church.

- **Social Action**

Grants for this theme need to demonstrate how the applicant’s project will deliver tangible outcomes to tackle poverty, exclusion, economic inequality or environmental concerns

- **Applied Research**

Grants will be awarded to projects which seek to develop and apply Catholic Social Teaching and Thought, in partnership with those who are working in and delivering social action work, with a view to ultimately improving practice and public policy.

There are two types of grants that CPT offer:

- 1) **Large Grants Programme** (£5,001- £60,000): Grants are typically around £30,000 - £60,000, to be spent within two years. However, for exceptional projects the Trust may, at its discretion, consider higher levels of funding. A full application form must be completed for this type of grant.
- 2) **Small Grants Programme** (£1,000 -£5,000): Grants are typically around £5,000 and are designed to support highly localised projects. All projects should be completed within one year. To be eligible for a small grant an organization must have an annual turnover of less than £100,000¹) and be a legally registered charity. A condensed application form must be completed for this type of grant.

2. About this year's bidding round

2.1 Following a major review of the Trust's grant making activities, the Trust now invites bids across all three of its funding priority themes.

2.2 Since the Plater Trust awarded its first grants in 2008, it has funded over fifty diverse projects, each contributing to the Trust's overall aim of advancing social justice through education in the broadest sense.

2.3 Applications must be made online via our website by **5:00pm on Friday 15th October 2021**.

3. Eligibility Details

3.1. Applications will only be considered from organisations (normally registered charities) for work that is legally charitable. **Applications will NOT be considered from or for individuals.** The Trust will consider applications to fund a postgraduate scholarship on a relevant topic, providing that the applying academic organisation ensures that it holds an open competition to select a candidate to undertake the grant-funded research.

3.2. The applicant organisation(s) must be based within England and/or Wales and the projects for which funding is sought must also be in England or Wales.

3.3 Applicant projects must advance one or more of our three priority themes – leadership for lay people; social action and/or applied research.

3.4The Trust will consider applications from organisations seeking to use a Plater Trust grant as match funding as part of a larger project, but only if it contributes to an effective delivery of the CPT mission.

3.5Applications from a consortium or partnership of organisations will be given consideration if the project has a clearly listed chief contact from the lead organisation, and fulfils all other eligibility criteria.

3.5 Applicant charities must have at least three non-executive trustees or directors.

¹ The definition of what constitutes a 'small charity' here is taken from the widely accepted classifications derived from NCVO UK Civil Society Almanac: (<https://data.ncvo.org.uk>) which defines a small charity as one with income £10,000 - £100,000 and a 'micro' charity as one with an income below £10,000.

3.6 Applicants should not normally apply for a grant larger than £60,000 in total unless an exceptionally strong case is made to go above this usual limit. Such a funding decision to exceed the limit is at the discretion of the Board of Trustees.

4. Format for Grant Applications

The Trust provides a specific user-friendly online application form for completion by applicants. This is longer and more detailed for organisations applying for larger grants, while organisations requesting a small grant are required to provide less information. There are in built word count limits for some of the questions and others are simple tick boxes.

A sample application form can be downloaded from our website to show all the questions we ask so you can see in advance of completing what information we need.

Please avoid the use of technical terms, acronyms and jargon in your application and, where abbreviations are used, write them out in full in the first instance.

The latest set of the charity's annual accounts should also be uploaded with your completed application form, along with a project budget and a copy of the charity's safeguarding policy.

Please do not attach any other additional digital media files such as film, still images or audio.

One external referee paragraph of support is needed for applicants seeking a small grant.

5. Criteria for assessing applications

General Guidance

- Assessment of addressing evidenced need in the context of Catholic Social Teaching (CST) and the three funding priority themes will be key to an application's success.
- It is expected that applicants will demonstrate an understanding of, and commitment to, the core principles of CST.
- Applications will be assessed against the following five criterion by members of the grant making committee. Applicants are required to be clear about **why** the project is necessary, **who** it will benefit, **how** it will be delivered, **what** difference will be achieved and **if, when and how** will it be sustained (please see below for more detail about what these mean).
- Each criterion is important, and members of the grant making committee will score applications on a scale of 0 (not met) to 5 (fully met) for each criterion. Through a collective quantitative and qualitative assessment exercise by the grant making committee, a shortlist of grant applications deemed the strongest, will then go to a full board of trustee meeting where final funding decisions will be made.
- Ethical practice considerations, particularly for academic research - will be assessed where relevant, so should be considered from the outset in project proposals.
- Applicants should be aware that the standard of applications has been improving year on year and, whilst we recognise that the workload associated with bids diverts practitioners away from front line work, investment of time in evidencing the need and the change an intervention will provide, will be key to a successful application.

1. Need (why)

Applicants should clearly explain the need for their specific project.

Why is the project needed and how effectively is it articulated in the context of one of the core CPT funding themes (leadership of lay people/Social Action/Applied Research)?

CPT Assessors are looking for a detailed appraisal of how you know this work is needed. This could include knowledge gained from evidence of work you have done before, consultations with beneficiaries, the research of others, or evidence of outcomes from a pilot etc..All claims about need should be evidenced by this type of data as far as is possible.

2. Beneficiary involvement (who)

Who are the target group for the proposed project? Have they been involved in the design and delivery model? How much user involvement is appropriate for your project and why?

We ask all applicants to be clear about how they involve beneficiaries, how they get their feedback and how they use this to ensure that activities reflect their actual needs. We also ask you to think about what level of ongoing involvement in project decision making ,beneficiaries are intended to have.

Assessors know that user involvement is far from straightforward and there may be many valid reasons as to why beneficiaries can only perhaps be partially, or even occasionally, not involved. So we ask you to explain clearly in your application what level of user involvement you feel is appropriate for the project you wish us to fund. We refer you to the useful ladder of participation tool [here](#) to help you explain your particular approach to user involvement.

3. Response (how)

How does the proposed project address and mitigate the identified need?

We want to understand what you plan to deliver and over what period. This question is likely to include details about: the type of activities provided, who delivers the activities, the average length of time you work with individuals, duration of sessions, frequency of contact, where the activity is delivered, how the activities are provided and the number of people you intend to help each year.

Assessors will also consider overall project feasibility and whether the applicant has produced evidence of its capacity to undertake the proposal. There needs to be an explicit connection between identified need and the proposed response or intervention.

It is also important that assessors are able to see how the proposal is distinguished from other projects delivering in the same area and/or how it adds value? Assessors will expect applicants to differentiate themselves from other organisations responding to similar needs, including the potential for partnership working with other organisations.

4. Outcomes (what will change)

What practical results, changes and/or improvements in the lives of the people you help do you hope to achieve by project completion ?

Assessors will be looking for specific details of the measurable short and medium term change(s) you plan will happen in people's lives as a result of your work. Such outcomes can be for individuals, families, your own organisation and for wider communities and society.

Assessors will also want to know how will you monitor and evaluate the work? (i.e. how you will know whether, and to what degree, your project has been successful?

Ideally we recommend some baseline tool which can measure the change pre and post your work.

5. Sustainability (if, when and how)

What will happen to the project after the Plater funding ends?

Assessors are realistic in knowing that sustainability is often hard to achieve and sometimes not relevant if the need identified is a specific short term one. Please tell us here what sustainability means for your proposed project.

It is also important for assessors that organisations are proactive in sharing the project outcomes and learning. We want to know how you plan to make your work more sustainable by sharing its results, and how in the case of applied research projects, it contributes to the ongoing task of building Catholic social thought and practice in the UK context.

6. About Plater Trust grant awards

- Funding will be for up to 100 per cent of project costs. With limited funds available, there are difficult choices for Trustees to make, and unfortunately we are only able to fund approximately one in every five applications we receive.
- The maximum length of time for a project to be undertaken is two years for large grants and one year for small grants. Projects longer than this period will not normally be considered.
- Successful applicants will be required to sign an agreement, which will include:

- The submission of a mid-term report on progress of the grant funded project (normally at the 12-month stage)
- that the Trustees or their nominated representatives may visit the organisation to assess progress and offer support.
- that appropriate mention of the Trust be made on all publications produced as a result of the grant, including use of the Trust's logo. The Trust should be notified in advance that such materials are being produced.
- That successful applicants will supply material about the project for Plater's website in the form of short case studies, photographs, videos or downloads as appropriate.
- Where the application for grant funding is made by a consortium or partnership, one of the applicant organisations must be identified as the responsible financial body (lead body) and the key responsibilities must be clearly allocated in the joint application. Responsibility for submitting narrative and financial reports will rest with the responsible financial body. Dispersal of funds received from the Trust to consortium members or partners for work undertaken on the project will be a requirement of the responsible financial body, not the Trust.
- The Trust will consider applications from organisations seeking to use its grant as match funding as part of a larger project but only if it contributes to an effective delivery of the Trust's objects, reflects its values and relates directly to Plater's mission.
- Recipients will be expected to maintain separate cost centres and accounts for any funds received from the Trust so that expenses can be allocated clearly.
- The Trustees reserve the right to call for written accounts of all projects funded by the Trust at any time upon reasonable notice.
- Successful applicants will be required to delay any publicity about their grant award until after the Trust's annual awards celebration (to be held in February 2022).

7. What happens after we receive an application

The processing of applications by the Trust will be as follows:

- a. All applications will be acknowledged by email within five working days confirming safe receipt;
- b. Any submissions that do not address one of the three funding themes will not be considered;
- c. Valid applications will be considered by the Plater Trust's Grant Making Body before being referred to the Trustees for final decision;
- d. The Trustees reserve the right to amend the terms and conditions of the grant making process at their discretion and without prior notice. Their decisions will be final;
- e. All applicants will be informed by e-mail once the process is complete; this is expected by early January 2022.
- f. The formal announcement of the awards will be made at the Plater Trust's annual celebration to be held in February 2022.

8. How will the grant be paid?

After confirming the award of the grant to successful organisations, the trust will send an agreement form to be signed by the responsible person for that organisation. On satisfactory completion of the agreement, the Trust will pay the grant in the following stages:

- The organisation will receive 50 % of the total grant at the outset, as start-up assistance for the project.
- A further 40% of the grant will be paid upon receipt of a mid-term progress report setting out progress of the project one year after commencement (or the half way stage for projects of shorter duration). If, at this interim stage, little or no progress has been made, the grant may be rescinded and the initial grant clawed back.
- The final 10 % of the grant awarded will be paid by the Trust upon receipt of an adequate final report. **This must be received by the Trust no later than three months after the project's completion.**

Organisations should note and take account of this timetable for grant payment for their cash flow and budgeting purposes.

Document History

v1 – Initial Draft (27th August 2019) produced following discussions at the Trust's Grant Making Body on 22nd August 2019.

V2 – various corrections and front page expanded

V3 – (28th August) further revisions on criteria

V4 – (2nd September 2019) further revisions following consultation with GMB

V5 – (24th June 2021) at GMB meeting.