



## Eric Wright Charitable Trust – Guidelines

### Overview

The Eric Wright Charitable Trust is a charitable body that was formed by Mr. Wright in 1990, based on the belief that the role of business in society is not to create wealth for the few but instead is fundamental to the building of a strong community. Originally vested with 49% of the shareholding, the Trust is now the sole owner of 100% of the Eric Wright Group - an award-winning leader in the UK property and construction industry - following the gift of his remaining shares by Mr. Wright.

### Who can apply?

In the Lancaster District, the programme is aimed at smaller local organisations with an average annual income of less than £50,000. If your usual income would be £50,000 or less but has marginally gone over this threshold in the last 2 years due to external factors (e.g. capital grant received, one-off project funding or post-COVID sustainability funding), we will still consider an application as long as you are able to explain reasons for the additional income. Please feel free to contact us in advance to discuss suitability if you are unsure.

You must be working within the voluntary, community and social enterprise sector providing activity to make a positive difference to the lives and wellbeing of people of any age. We would like to encourage all small voluntary or community groups to apply. Those without a formal constitution are asked to seek support from an established organisation or group. If you are unsure how to go about this, please get in touch with us.

### What is the focus and criteria of the fund?

The Trust makes grants to organisations providing activities with a charitable purpose.

- Receiving organisations do not need to be registered charities, but the activity for which they seek a grant must be charitable, which includes social activities
- The application must be made on behalf of an organisation, not by an individual.
- Activities that cannot be funded include projects/events that have already taken place or been paid for, contributions to major appeals, activities promoting political or religious beliefs and activity which should be provided by statutory services.

### **How much is available?**

Grants of up to £500

### **Which areas are covered?**

The Lancaster district as defined by Lancaster City Council's political boundaries i.e. Lancaster, Morecambe, Heysham, Carnforth and surrounding rural areas.

### **Supporting documents**

The following must be supplied to support your application. If you are struggling to supply these, please contact us for advice and support.

- A signed copy of your governing document i.e. your constitution or rules
- Most recent annual report (if you have one)
- A copy of the group's latest annual accounts or income/expenditure document (If the accounts show a reserve, please explain why you are requesting a grant)
- A copy of a recent bank statement for your group or nominated bank account
- Any relevant quotes linked to your breakdown of costs
- A copy of your Equality, Diversity & Inclusion Policy (or similarly named policy), which should have been reviewed and approved within the last two years.
- If your project involves work with children or vulnerable adults, a copy of your Safeguarding Policy, which should have been reviewed and approved within the last two years.
- Copies of any other policy you believe is relevant to your application.

You are not required to provide any other supporting material in addition to the information you will be asked to provide in the application form.

### **Application and Grant Making Process**

*Applications can be submitted at any time.* All applications submitted and received between the first and last day of any month will be considered at the next decision-making panel. Panels will take place during the 2<sup>nd</sup> week of each month.

*For example, an application received at or before 11.59pm on 31<sup>st</sup> January will be discussed at the panel taking place in the second week of February.*

You should hear the outcome of your application shortly after the panel has met.

### **Evidence and Publicity**

At the end of the activity you will be asked to provide us with evidence that you have spent the money on what it has been given for – e.g. a copy of the receipt(s). We will also require a write-up about the funded activity along with photographs and / or videos that we can use for publicity purposes including press releases, social media, website, reports etc.

**Underspend**

Should you not spend the entire grant on the purpose for which it is given, please let us know. When you let us know, if you would like to make a suggestion about what the remainder could be spent on, this could be considered at the next meeting of the panel - please don't just spend it.

If you have any queries about the fund, or about how to apply, please do not hesitate to get in touch with us by emailing [sharonphillips@lancastercvs.org.uk](mailto:sharonphillips@lancastercvs.org.uk) or by ringing CVS on 01524 555900