



## **APPLICATIONS FOR THE MEDICALLY RELATED DONATIONS PROGRAMME**

### **INFORMATION FOR APPLICANTS**

This grant scheme, available to registered or exempt charities, is for capital expenditure to support innovation. Grants given under the Medically Related Donations scheme are awarded annually and are for capital projects only.

This grant scheme is for capital expenditure to support innovation in one of two areas:

1. In the field of medical research by funding infrastructure development in universities and/or hospitals, which will be used to improve healthcare. The Trust's focus is on the physical facilities in which translational science is undertaken, which may involve laboratory space or patient facilities.
2. In the provision of care. The Trustees will define a specific theme which is currently 'the provision of an original care model for people living with severe disabilities.'

The programme is open to registered or exempt charities operating within the UK and provides funding for capital expenditure.

[Examples of previous awards](#) are available from the Trust's web-site.

Depending on the availability of resources, the Trustees hope to allocate up to £1.5m in total annually to this scheme. It is likely that approximately four awards will be made each year, across the two areas of priority. The Trust may fund a project completely, or make a contribution towards the funding of a larger project. Where the Trust is considering a contribution towards a larger project, the Trustees will take a particular interest in the criteria concerning innovation and the transformational impact of any specific elements of the project that might be funded by the Trust.

### **Eligibility**

1. This programme is available to registered or exempt charities operating within the United Kingdom and is for capital projects only. Potential applicants should note that it is not possible for the Trust to make donations to:
  - a. Beneficiaries who do not have registered charity status,
  - b. Overseas organisations, or to organisations based in the UK who are seeking support for a project overseas,
  - c. Faith-based charities.
2. The Trust does not accept new applications from organisations which have received an award under the Medically Related Donation Programme within the past 2 years. Applications which have been previously rejected cannot be re-considered.

3. Please note that substantial demand for the Trust's limited and finite resources means that application for a medically related donation is a competitive process. Submission of an Expression of Interest does not guarantee shortlisting or the award of funding.
4. The Trust normally expects successful applicants to draw down the award within 2 years of the award notification date.
5. Expressions of Interest may be submitted from **6th January 2021 to 31st March 2021**. Shortlisted applicants will be asked to provide a fully detailed application which will be presented to the Board of Trustees for a decision at its meeting in the autumn.
6. Expressions of Interest are limited to one per organisation/institution, per year.
7. For sums below £1500 the Ann Rylands Small Donation Programme application process should be used.
8. Applicants should contact the Trust, should they have any further questions  
Email: [donations@julesthortrust.org.uk](mailto:donations@julesthortrust.org.uk)

### **HOW WE FUND**

The application process operates competitively, with a triage of short preliminary applications, followed by submission of detailed applications, and, where appropriate, site visits. The Trust is not prescriptive in defining the nature of bids which may qualify for funding but, where applicable, applicants will be expected to fully complete the application form, explaining clearly and convincingly the need of the project and why the Trust should support it.

Awards are made annually by the Trustees at their autumn meeting, usually held in November.

There is a two-stage application process:-

1. Preliminary proposals  
Applicants should submit their online Expression of Interest application form (available through our [website](#)) by no later than **31<sup>st</sup> March**.  
The Trustees will undertake short-listing at their summer meeting, usually held in May or June.
2. Full Proposals  
Applicants whose proposals are shortlisted will be invited to make a fully detailed submission **by 31<sup>st</sup> August**.  
These full applications will then be subject to peer review or site visits, where appropriate, and Trustees will make their final decisions at their autumn/winter meeting, usually held in November.  
Applicants should hear the outcome in December.

## **Application form Guidance**

### **Section 1 – Eligibility**

Please answer the eligibility questions. If you are eligible to continue the form will appear below the answered questions.

## **Section 2 - Charity Details**

Please input the details of the charity or organisation that is applying. Questions marked with \* are required before the form can be submitted.

## **Section 3 - Main Contact**

Please input the details for the main contact of the charity or organisation that is applying. Questions marked with \* are required before the form can be submitted.

## **Section 4 - Charity Objectives & Public Benefit**

- A. Describe briefly the objectives and work of the applicant charity. (Max 1,000 words)  
Please state the objectives and aims of the charity or organisation applying. We want to understand the work that you do and how it impacts the public.
  
- B. Please specify what public benefit is provided by the applicant charity. (Max 1,000 words)  
We want to understand how the charity or organisation supports and provides benefit to the public. Please state how the charity or organisation does this.

## **Section 5 - Your Appeal**

- A. Please provide a concise summary of the project for which you are seeking financial support. (Max 1,250 words)  
Please describe what you propose to do detailing briefly the key aims and objectives of the project. Please ensure to provide a brief summary of the top level, relevant background information necessary to provide evidence of the need for the project. You should also mention how the project will be sustainable and how it will provide a catalyst for change within the community it will be supporting.  
  
Please include how the level of the applicant charity or organisation's reserves may influence the project funding plans.  
  
This section should provide a clear and succinct summary of the proposed project (applicants shortlisted to the Second Stage will have the opportunity to elaborate further on their project design).
  
- B. Please explain how the project meets the Trust's criteria and how it relates to the funding themes of research and care? (Max 250 words)  
Please detail how the project fits the following funding themes 1. infrastructure for medical research in universities and hospitals, and 2. original models of care. You should also make a clear case as to what is innovative about the project. You should also explain why your project is needed now.
  
- C. What is the anticipated outcome of this project and how will it provide benefit to the public? (Max 250 words)  
We wish to understand the potential impact of the project in the short and longer term. Your response should detail what the outcomes of the project will be and how the project

will be transformative for those it will support. You should also focus on how the outcomes will be measured, detail how the project will provide a catalyst for change and provide a wider benefit to the public

- D. Please detail the project delivery plan. Please include timelines, milestones and any go/no-go checkpoints. (Max 500 words)

Please state and provide details of your project delivery plan. The Trust expects the applicant to detail the milestones that must be met along with their corresponding timescales. Please set out the principal risks you foresee in delivering the project, how these will be managed and, where appropriate, any go/no-go checkpoints.

- E. What challenges do you face in finding funders for this project? (Max 250 words)

Please provide a brief overview of the financial plan for the project and any challenges you have faced or anticipate in finding appropriate funding for this project. Please state any contingency plans you have in place if appropriate funding is not found.

- F. The cost of your project:

- i. What is the total cost of the project?

Please state the estimated total cost of the project, in its entirety.

- ii. How much have you raised so far from external sources, not including your own contribution?

Please state the exact amount you have raised so far from external sources. Please do not include any contribution made by the applicant charity or organisation, including from reserves.

- iii. Source of funds already secured from external sources only

Where permissible, please detail the source of the funds you have already secured and included in the figure above (question ii).

- iv. How much are you contributing from your own resources?

Please state the amount the applicant charity or organisation is contributing in total to this project from their own resources.

- v. Please comment on your charity's current level of free reserves, its relationship to your Trustees' reserves policy, and how the figure in your answer to question iv (above) has been determined.

Please state the applicant charity or organisation's current amount of free reserves, and how this relates to the financial plan for the project.

- vi. How much remains outstanding and needs to be raised?

Please state the total amount remaining to be fundraised in order to complete the project.

vii. How are you intending to bridge any shortfall?

Please detail how you are hoping to fill any gaps in funding. If any shortfall is to be carried by the applicant charity or organisation, please state how the applicant charity or organisation is to support these costs.

viii. Applications pending

Please provide details of any other funding applications relevant to this application. Please provide the name of the charities or organisations you have applied to, as well as the amounts you have requested and the date you hope to hear the outcome.

## **Section 6 - Supporting & Reference Documents**

### 1. Trustee's Report & Financial Statements

Please upload the **most recent fully signed copy** of your Trustee's report and financial statement. Please note that if the Trustee's report and financial statement is not signed your application will be unable to be processed and will not be reviewed by the Trust.

### 2. Budget in support of Section 5

Please upload a budget that supports your answers in section 5. Please outline each phase of the project with its associated costs.

## **Section 7 - Consent Statements**

Declaration from the Lead Applicant is required to confirm that all of the information provided within the application is accurate and correct (to the best of your knowledge) and that you have read and accept our [Terms and Conditions](#) of award. (Approving the application will imply that the approver agrees to abide by our terms and conditions if a grant is awarded).

## **Second Stage Application Guidance**

The second stage application should be the applicant's own "case for support" which, together with the Expression of Interest form and attachments submitted at the preliminary stage, should provide the Trustees with a comprehensive picture of the project, its financing, and the justification for the Trust providing support. In addition to covering fully the issues specified in the bullet points above, the submission should include:

1. An update on information in the original Expression of Interest form, if relevant
2. The latest budget, plus cash flow forecast (income and expenditure)
3. Projections for revenue sustainability post completion of the project

The "case for support" should not exceed 10 sides of A4 with maximum font size 11. All submissions to the Trust should be made via the online form, a link to which will be sent directly to short-listed applicants.

The Trust may wish to visit the applicant as part of the assessment process, or to invite comments from independent reviewers.