

**T H E R C S H E R R I F F T R U S T**  
Advancing the arts in Elmbridge

## Grant Pack

**Please read the guidelines on the next pages carefully before submitting an application. All applicants are strongly advised to contact the Trust's Director for an informal discussion before completing the form.**

**This Grant Pack applies to the following grant schemes:**

**Project Grants for Organisations and Individuals  
Underwriting Grants (for organisations)  
Capital Grants (for venues and arts organisations)**

**Dates for 2012**

<b><u>Application Deadlines</u></b>	<b><u>Date of Trust Decisions</u></b>
Monday 09 <sup>th</sup> January	Wednesday 25 <sup>th</sup> January
Monday 16 <sup>th</sup> April	Tuesday 08 <sup>th</sup> May
Monday 09 <sup>th</sup> July	Tuesday 17 <sup>th</sup> July
Monday 08 <sup>th</sup> October	Thursday 01 <sup>st</sup> November

**Schools should apply using the separate Schools' Fund Pack**

**All enquiries should be addressed to:**

The R C Sherriff Trust, Case House, 85-89 High Street,  
Walton-on-Thames, Surrey KT12 1DZ. Tel: 01932 229996  
email: [arts@rcsherrifftrust.org.uk](mailto:arts@rcsherrifftrust.org.uk) [www.rcsherrifftrust.org.uk](http://www.rcsherrifftrust.org.uk)  
Registered Charity No.272527

## **Guidelines for Potential Applicants**

### **Aims of the Scheme:**

The R C Sherriff Trust supports the arts in Elmbridge, through its grant-making, for the following purposes:

- To support and stimulate excellence, new ideas and innovation in the arts in the borough, whether amateur or professional
- To invest in the creative talent of individual artists in Elmbridge and to provide opportunities for them to develop further their skills and knowledge
- To increase opportunities for all Elmbridge residents to take part in or experience high-quality arts activities, whatever their economic or social circumstances
- To increase resources and improve facilities for the arts in the borough
- To support and encourage initiatives aimed at the development of new audiences and venues for the arts in the borough
- To promote good practice in management, marketing, fundraising and educational work amongst arts organisations in Elmbridge, and to encourage collaboration.

### **General Guidance**

**Note 1** All applicants are advised to contact the Trust to discuss their applications with the Director before submitting them.

**Note 2** **No retrospective grants will be awarded.** Decisions will be made at Trust Board meetings on the dates listed on the front of this pack and applicants will be notified of the results within two days of the meeting. ***Applications will only be considered for Projects scheduled to start at least three weeks after the particular date of decision.*** If in doubt, please check the timing of your application with the Trust.

**Note 3** Eligibility. All applicants must be residents of the Borough of Elmbridge. In the case of organisations, the majority of their membership should come from within the Borough and it should be perceived that they are an Elmbridge-based group.

**Note 4** **All successful applicants must issue a press release about their association with the Trust and use the items in the Marketing Pack, supplied by the Trust.** (NB *This condition may be waived in respect of some awards to individuals*). The pack is supplied either with the offer letter, in the case of Underwriting Grants, or with the cheque for all other types of grant. If you do not receive one, please call the office.

**Note 5** **Successful applicants are required to return monitoring forms and/or reports about the funded project after it has taken place. Failure to do so may affect future applications.**

**Note 6** If a grant offer *is* made, a cheque will only be released upon confirmation that **all** the money required for the project, is in place (except in the case of Underwriting Grants, of course).

**Note 7** **GRANT OFFERS MUST BE ACCEPTED WITHIN ONE MONTH OF THE DATE OF THE OFFER LETTER, OR THE OFFER WILL LAPSE.**

### **Guidance for Organisations**

#### Who can apply:

Arts organisations, both professional and amateur; other local organisations, voluntary and community groups who use the arts as part of their work/activities, or wish to host an occasional arts event; and consortia of organisations or individual artists (one of the organisations or individuals involved would have to take a lead role by assuming responsibility for making the application and managing any grant).

#### What can you apply for:

Capital, Project or Underwriting Grants, purposes of which could include:

- Commissions of new work from professional artists
- Productions, performances, one-off arts events
- Tours of “artistic product” to the village and public halls, and arts venues around the borough
- Artists in residence, masterclasses
- Research and development, and experimental projects
- Educational programmes
- Participative arts activities, particularly for young people and retired people
- Marketing initiatives and audience development strategies
- Capital items such as equipment and improvements to facilities and buildings.

**Note 8** The Trust will only award grants to properly constituted, not-for-profit organisations, although they need not be registered charities.

**Note 9** Organisations applying for more than £500, must supply a set of their most recent Annual Accounts.

**Note 10** Organisations may apply for grants to **develop and improve** their repertoires, activities and skills, *not* to subsidise core activities. **The Trust will not fund the purchase of sheet music and scores.**

**Note 11** Your application may cover more than one activity.

**Note 12** The application form must be signed by the Chairperson or Treasurer of an organisation, unless by prior arrangement with the Trust’s Director.

- Note 13** Cheques for organisations will not normally be made payable to an individual, unless by prior arrangement with the Trust's Director.
- Note 14** Successful applicants may not reapply to the Trust within the same financial year (January – December), ***although exceptions may occasionally be made in the case of Underwriting grants if they are not required/taken up in the first instance.***
- Note 15** *Please return a completed Cover Sheet and Parts A, B and C of the enclosed forms to the Trust office by the appropriate deadline.*

### **Guidance for Individuals**

#### Who can apply:

Composers, craftspeople, curators, designers, directors, film-makers, musicians, performers, producers, promoters, theatre technicians, visual artists, writers and other individual arts practitioners.

#### What can you apply for:

Grants to assist with:

- Professional development and training (including travel grants) eg short courses in specific skills, work placements with other artists, specified periods of travel and/or study
- Research and development for arts projects
- The publication, production or exhibition of a specific piece of work
- Capital items eg equipment

**Note 16** Managers, education officers, fundraisers, marketing staff, press officers and workshop leaders may apply for individual grants towards training and personal development only.

**Note 17** *Please return a completed Cover Sheet and Parts B and C of the enclosed forms to the Trust office by the appropriate deadline.*

**Note 18** If successful, applicants can apply once a year for *a maximum of three consecutive years*, after which they must wait at least one complete financial year (January – December) before applying again.

#### **What We Do Not Fund:**

- Arts activities or events taking place outside Elmbridge (except in the case of attendance at training courses/development opportunities for individuals)
- Activities that are not arts-related
- Fundraising events, eg special performances in aid of a local charity
- Activities that provide no potential benefit to the public

- Activities which have already taken place; goods or services that have been bought or ordered before receiving an offer letter
- Commercial ventures which could recoup their costs from their profits (other than Underwriting grants for performances)
- Costs that are already covered by other funding
- Core costs ie ongoing overheads such as salaries, insurance, maintenance budgets for equipment or buildings
- Higher education courses, long-term vocational training eg Drama School, or ongoing training programmes (eg piano lessons, regular dance classes).

### **Partnership Funding:**

We expect you to find approximately 50% of the money you need from other sources (except in the case of Underwriting Grants). These can include:

- Earned income from your proposed arts activity
- Funding from public organisations such as local authorities (ie Elmbridge Borough Council, Surrey County Arts), the Arts Council South East, the Heritage Lottery Fund etc
- Grants from other Trusts and Foundations
- Business sponsorship
- Fundraising activities
- A contribution from you or from your organisation's reserves

### **What Levels of Grant are available?**

***Project and Capital awards are unlikely to exceed £1500.***

***Underwriting Grants are unlikely to exceed £1000 for a series/run of performances, or £500 for a one-off performance*** (if your event is likely to make a bigger loss, perhaps you should re-think its financial viability and its 'audience appeal'!)

***Awards to individuals are unlikely to exceed £500***, except for large-scale ventures.

### **How do Underwriting Grants work?**

This flexible scheme has been introduced specifically for the support of any arts event, amateur or professional, that is anticipated to "break even" financially. The Trust is keen to ensure that local organisations do not make a financial loss, but it may not use its charitable funds to help create a surplus. Therefore, **we will only offer Underwriting Grants for events where there is the potential (however small) for a profit to be made.** Please read the notes for this category, below, and, if necessary, seek further advice from the Trust's Director.

When applying for an Underwriting grant please complete the Cover Sheet and Parts A, B and D of the enclosed forms. Part D is a special budget that will ask you for the maximum box office achievable (i.e. if every ticket were sold at full price) and the minimum estimated box office (i.e. your lowest expected return). The Trust will usually underwrite the difference between your lowest expected box office return and the cost of the event. The amount of your grant relates directly to your ticket sales.

**For example: A sample budget for your event –**

Expenditure (cost of event)	750	
Maximum box office income	1000	eg 100 tickets @ £10 each
Estimated minimum income	500	eg 50 tickets @ £10 each

Underwriting grant = £750 (expenditure) – lowest estimated income £500, therefore the Trust would offer a maximum underwriting grant of £250.

After the event, you submit an Income and Expenditure report to the Trust. The following are examples of the possible outcomes:

**Actual income £500:** £750 (expenditure) - £500 (income) = **£250**,  
*maximum underwriting grant paid*

**Actual income £650:** £750 (expenditure) - £650 (income) = **£100**,  
*underwriting grant paid*

**Actual income £1000** - £750 expenditure = **£250 profit**; therefore,  
**NO UNDERWRITING GRANT NECESSARY/PAYABLE.**

**What would be eligible for capital funding?**

This fund supports:

- a) specific, arts-related enhancements to venues in the Borough, such as the purchase of stage lighting, sound equipment or specialist fixtures and fittings, eg stage curtains, sprung floors, induction loops etc. ***The venue must have a significant, valued element of arts programming in order to qualify for a grant.***
- b) the purchase of instruments or items of specific, arts-related equipment, by non-building-based arts organisations, to improve the resources available in the Borough.

Please note that the R C Sherriff Trust does *not* put money into bricks and mortar.

***Application is by formal written proposal, which must include the following:***

For venues:

- the type and amount of arts usage (if it is a multi-purpose venue, such as a village hall) with, for example, a profile of a typical user group
- the current state of the venue
- what improvements are required, and why (eg what, if anything, they are replacing; how the various user groups and their

audiences will benefit from them; how they will improve the artistic standards or training opportunities)

- how long it will take to implement and complete the enhancements
- who will provide any training needed in the use and maintenance of these new facilities, for the venue staff/volunteers and for members of the user groups; what will be the time-scale for this; and how will it be funded.

For arts organisations:

- why the equipment is needed (eg what, if anything, it is replacing; how it will improve the artistic standards or training opportunities or how the members and/or audience will benefit in other ways), the time-scale for purchasing and installing the equipment
- who will provide any training needed in the use and maintenance of this equipment, for members of the arts group, and how will this be funded
- the arrangements for making this equipment available to other arts organisations in the locality and for training them in its use and maintenance

For all applicants:

- A full financial budget relating to the proposed work/purchase must be enclosed with your proposal (in addition to a copy of the organisation's most recent Annual Accounts if you are applying for more than £500).
- The budget must show the full costing for the project, and how this will be covered ie how much money can be raised from other funding sources and how much (the balance) you are requesting from the R C Sherriff Trust.
- The application must also show evidence that the organisation has sought two or three quotes from different suppliers/contractors for the work/equipment, and
- A copy of the estimate from the successful 'bidder' must be included, with an explanation of the choice.
- ***If a grant offer is made, a cheque will only be released upon confirmation that all the money has been raised for the project; and the applicant will be asked to submit copies of receipts for the work/equipment, upon completion.***

**Please note that applicants can apply for a maximum of 50% of the cost of the project, whether venue enhancement or new equipment, and that the Trust is unlikely to award grants of more than £1500, unless there are exceptional circumstances.**

**What do I do now?**

Please complete and return the appropriate application forms (enclosed), or submit your proposal (for capital grants), by one of the four deadlines quoted on the title page.

R C Sherriff Trust  
December 2011