



Community Matters Yorkshire

Sue Davies

Director

Bernard Sunley Foundation

14th March 2023

Who we are

- Established in 1960.
- Family grant making foundation.
- Support charities across England and Wales.
- Four funding categories:

Community

Education

Health

Social Welfare

Who we are

- More than £128 million awarded since 1960.
- Over £4 million pledged each year in grants.
- 2021/22: 367 grants awarded totalling £4.282 million.
- A capital funder.
- Support projects delivering a community focus or providing facilities that support those in need.

Our funding

- Three levels of grants: Large, Medium and Small.
- Large grants of £20,000 and over.
- Medium grants between £5,000 and £20,000.
- Small grants of £5,000 and under (for project costs of £100k and less)
- Online applications only at: www.bernardsunley.org.
- Applications accepted all year round.

Our funding

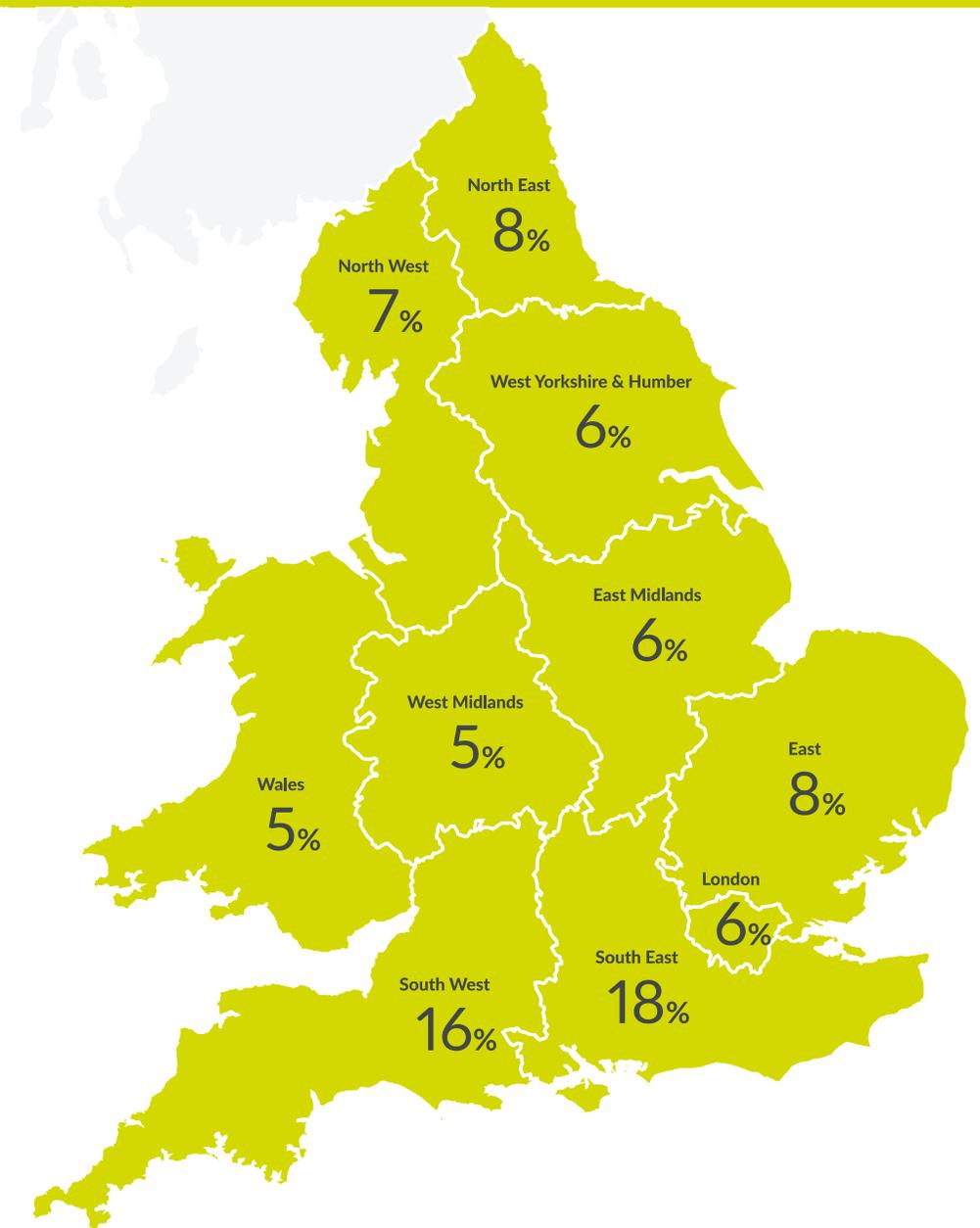
Grants approved by geographical area

More than half of the charities (52%) that received a grant this year were organisations that the Foundation was funding for the first time.

Grants are awarded to a range of projects throughout England and Wales.

Other
(UK wide, England & Wales,
England, Overseas)

15%



Our funding

Large and Medium grants

- Projects usually cost over £100,000 and can be up to £5 million.
- Agreed at three Trustees' Meetings held across the year.
- Applications assessed and agreed within approx. 6 months.
- Large grant projects are visited by staff or a Trustee.

Our funding

Small grants

- Projects usually cost under £100,000.
- Annual income of under £1 millions/
- Grants are between £2000 - £5000.
- Agreed by Trustees every month.
- Results within approx. 3 - 6 months.
- Represent over 65% of number of annual grants.
- 239 of this year's 357 grants were small, monthly grants.

Our funding

- We do not fully fund projects.
- We pledge grants for 2 years from date of grant offer.
- Payments are made when funds are raised for the capital project to begin.

What we fund

- Charities or CIOs registered in England and Wales.
- Certain organisations with 'exempt' and 'excepted' status. Includes places of worship, specialist schools, scout and guide groups, housing associations and community benefit societies.
- Capital projects
- New minibuses
- Churches and other places of worship with a strong, secular community focus.

What we fund: Community

- **Project aims:**

To bring local communities together and provide greater opportunities for the young, the elderly, the disabled and the disadvantaged.

- **Types of projects:**

building or refurbishment of Scout huts, Village halls, Community centres, Youth clubs, Boxing clubs, Outdoor activity centres, Farm and outdoor learning centres, Sports centres and pavilions, playing fields and playgrounds.

- New minibuses

What we fund: Community

Case study: The Ethel Trust

The Foundation awarded £10,000 in 2022 towards a kitchen for a newly commissioned community barge.

The charity was established in 1988 and provides day and residential canal and river sessions for disadvantaged groups in South Yorkshire.

The Ethel Trust provided lots of details on current and projected activities and a detailed fundraising plan showing plenty of local support.



What we fund: Education

- Special needs schools: Improvements and new facilities (e.g. playgrounds).
- New, adapted minibuses to benefit children with special needs and disabilities.
- Educational nature centres.
- New education and learning centres at museums, galleries and other arts organisations.

What we fund: Education

Case study: Catcote Academy, Hartlepool

The Foundation awarded £30,000 in 2019 to the creation of 'The Zone' – a new outdoor learning and activity space at this special needs school.

Catcote Academy caters for pupils aged 11 – 25, many of whom are profoundly disabled. The new outdoor space is turning an underused football pitch into an adventure play area, gym and sensory music space amongst other things. It will be maintained by the school's sixth form pupils and also be used by local groups and the wider community.



What we fund: Health

- The Foundation supports health charities that provide an excellent standard of care and support within their communities.
- Outdoor recreational spaces for care homes, hospices and day centres.
- Building and refurbishment projects.
- Specialist new transport.

What we fund: Health

Case study: Heel & Toe

The charity provides a range of therapies for children with physical and complex disabilities in the North East.

BSF has awarded £30,000 across 3 separate grants in 2013, 2017 and 2019 to enable the charity to extend its premises and offer enhanced services.



What we fund: Social Welfare

- The Foundation supports projects for veterans and the elderly.
- Schemes involving ex-offenders and those in prison.
- New, affordable housing units.
- New treatments centres.
- Building improvements to assist the homeless and vulnerable.

What we fund: Social Welfare

Case study: Lighthouse Homes, Rotherham, S Yorks

The Foundation awarded £10,000 in 2021 towards the conversion of an existing property to create seven single ensuite bedrooms.

Lighthouse Homes provides medium and long term accommodation and support for the homeless. It has a particular focus on supporting those with drug and alcohol addictions.



What we don't fund

- Charities registered outside England or Wales.
- Community amateur sports clubs community interest companies (CICs) or unregistered community groups.
- NHS hospitals or charities fundraising on their behalf.
- Mainstream schools, colleges or universities, or charities fundraising on their behalf.
- Charities with an annual income of £10 million and over.
- Newly established charities with no previous annual accounts.
- Individuals.
- Capital fees – building surveys, planning applications or feasibility studies.
- Core costs – salaries, running and repair costs, websites and other IT, programmes, rent, utility bills.
- Medical or research medical equipment.
- Fittings such as electrical appliances and furniture.
- Equipment such as IT infrastructure and AV systems, work tools, sports gear, musical instruments etc.
- Second hand vehicles

How to apply

- Online at www.bernardsunley.org
- Eligibility Quiz: <https://bernardsunley.org/apply/eligibility>
- Email/call us: office@bernardsunley.org or 0203 036 0090 with any queries.