

The Evelyn Trust

(Charity registration number 232891)

Guidelines for Applicants

and

Conditions of Grant

The Evelyn Trust

AVAILABILITY OF GRANTS

The Evelyn Trust was established as a charity in 1920, when it owned and managed The Evelyn Hospital in Cambridge. In 2003 it sold the hospital and invested the funds to support “the relief of sickness, the preservation and protection of health for the public benefit and the promotion of medical research and education within the City of Cambridge, the University of Cambridge or Anglia Ruskin University in Cambridge or otherwise in the surrounding areas.”

Grants are distributed at the Trust’s discretion to selected registered charities, institutions and causes. Its reasoning behind its decisions cannot be discussed with applicants.

The Trust makes grants for:

Clinical research projects and fellowships:

Towards the cost of specific, planned and well managed medical research programmes.

Capital projects:

Towards the cost of new buildings or extensions or for the renovation of existing buildings, as well as contributions towards the cost of new capital equipment required for a specific medical purpose.

Medical support staff and teams to achieve a step-change in service offering:

Towards the cost of medical / care teams and staff engaged in specific new or innovative programmes to provide medical and healthcare support to the public, including support in the home.

In addition, applications for grants will be considered, to support the work of charities that have a mission and purpose that coincides with the Objects of the Trust, including charities that support individuals.

The Trustees do not make grants where / for:

- Alternative funding from a non-charitable organisation is available.
- Ongoing overheads, administrative or maintenance costs, VAT or professional fees.
- General funds, non-specific appeals, endowment funds, conduit organisations or appeals by circular.
- Costs of meetings, conferences, conference fees, exhibitions, concerts, travel, expeditions, sponsorship of individuals, film or video production and the like.
- Organisations based outside the object area.
- Research involving live animals.
- Individuals or to provide support on an ongoing basis.
- The purchase of land.
- Causes with a strong political association.
- Research funding for fields already well supported by other charities.

Conditions are attached to the offer of a grant and an example of these is shown on page 11 .

TO APPLY FOR A GRANT

There are three stages in the grant application process:

1. *An outline application for a grant*

The format of this follows on pages 5 to 10 and brings together basic information to enable the Trustees to confirm whether or not The Evelyn Trust is able to consider the application further. Outline applications may be submitted at any time up to a deadline date of **30 November** preceding the grant year beginning from, usually, the following July.

Please note there are different outline application forms for medical research projects and non-medical research projects.

2. *Full application for a grant - more detailed supporting information*

If the Trustees decide they are able to consider the project further, they will wish to extend their enquiries by requesting a detailed explanation of the work to be done, how it will be achieved and the results and outputs that are being sought, as well as more detailed financial information, annual reports and accounts, copies of estimates, building plans, photographs, artists' impressions etc. In the case of research work a full protocol will be required, as will CV's, lists of publications etc. Also, opportunities to meet to discuss the project may be sought. Clearly the extent of such additional information will vary from application to application.

Appropriate expert advice is available to the Trustees from the Trust's Medical Advisory Committee or other professional advisors and the applicant may be requested to provide further information as a result of advice so received.

3. *Allocation of grants*

After final consideration of the full applications and Medical Advisory Committee reports, where they are sought, Trustees will allocate available funds to the applicants it wishes to support. Grants should be available to beneficiaries by the end of July.

Applicants should be aware that there is a very large demand from applicants for support and, therefore, by no means can all applicants be funded.

In the first instance, therefore, please submit an outline application by email (or by post) for a grant in the format attached, to:

**The Charity Director, The Evelyn Trust, at evelyntrust@aol.com or
P O Box 223, Saffron Walden, Essex CB10 9BP.**

Receipt of this will be acknowledged.

Applications need to be accompanied by a letter from the head of the organisation applying.

The Evelyn Trust

OUTLINE APPLICATION FOR A MEDICAL RESEARCH GRANT

1. Title of Research or other Project:	
2. Name of Applicant <i>Surname:</i> <i>Forename:</i>	Title and Position:
3. Co-Investigator(s) <i>Surname:</i> <i>Forename:</i> <i>Surname:</i> <i>Forename:</i> <i>Surname:</i> <i>Forename:</i>	Title and Position:
4. Current address: Postcode: Tel: e-mail:	Address where research will be conducted: Postcode: Tel: e-mail:
5. Lay title of research:	
6. Lay description of research or other project (100 words maximum – underline 5 descriptive keywords)	

The Evelyn Trust

OUTLINE APPLICATION FOR A NON-MEDICAL GRANT

1. Name of organisation applying for a grant _____

Registered charity number _____

Contact in the organisation

Name _____

Address _____

_____ Postcode _____

Telephone _____ *email* _____

Position/role _____

2. Brief (50 words maximum) description of aims and objectives of the organisation or charity applying for the grant. Please supply any publicity material or website address, explaining the work of the Charity.

3. Key financial information in respect of the organisation or charity:

• Total Fund Value £ _____

• Total Income £ _____

• Administration costs as a percentage of Total Income _____ %

A copy of the latest financial statements would be appreciated.

4. In lay language, a brief (250 words maximum) summary of the project, including details of support required, timescale for the project and a clear summary of the outputs and achievements/benefits that are being looked for and against which the success of the project can ultimately be measured.

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5. Brief (150 words maximum) profile and relevant experience of applicant or team leader and other key people involved.

-
6. Names, addresses and telephone numbers of two independent referees who would have a view on the need for, and importance of, the proposed project and who could be contacted by The Evelyn Trust if it would help its consideration of the application.

1. *Name*..... 2.

Address.....

.....

.....

Tel No.....

£

7. Cost of the project.

- Total cost of the project _____
- Funds already raised and pledged _____
- Amount still to be raised _____
- Amount being sought _____
- Over what period _____
- Previous support received from Evelyn Trust
(year and amount received please) _____
- **Other organisations that have considered, or are considering, a similar or related application and result, or the expected timing of that result:**

8. Breakdown of project costs

Please provide brief details of how the funding will be used

Posts to be funded and details of salaries (including NI and Superannuation)

Consumables – cost

Equipment – specification and cost

9. I/We have read this initial application for a grant from The Evelyn Trust and the Terms and Conditions that The Evelyn Trust attaches to the offer of a grant and on behalf of _____ (the applying organisation / charity) agree to be bound by them.

I/we also understand that no alteration or waiver of those conditions can occur without written approval from The Evelyn Trust.

<i>Applicant</i>	<i>Position Held</i>	<i>Telephone Number</i>
_____	_____	_____

<i>Signature</i>		<i>Date</i>
_____		_____

<i>Head of applying organisation</i>	<i>Position held</i>	<i>Telephone Number</i>
_____	_____	_____

<i>Signature</i>		<i>Date</i>
_____		_____

The Evelyn Trust

**CONDITIONS OF GRANT TO [APPLICANT] OF [APPLICANT BODY]
DATED [DATE]
TITLE OF GRANT (PROJECT REF)**

(This document will vary in its detail, grant by grant)

GENERAL CONDITIONS AND CLAIMS FOR EXPENDITURE

1. The Grant is to be used only for the purpose outlined in the Application approved for funding by the Trustees ('the Project').
2. Acceptance of the Grant shall be evidence of your acceptance of clause 1 and your agreement that, in the event of a breach of clause 1 or any other material provision of these Conditions the Grant shall be returned in full with interest from the date of your receipt of the Grant to the date of its repayment at 5% above the published Base Rate of the Bank of England, during this period.
3. By accepting the Grant you also agree to be subject to these Conditions as a whole.
4. The Grant is made to the Applicant for an amount of up to £_____ to be paid over _____ (from the start of the Project) to support the research of _____ to be conducted by _____, and only by him / her.
5. The Grant must not be used for overheads, administrative and maintenance costs, VAT, professional fees, travel and delivery costs and no additional money will be granted to cover these costs.
6. You confirm that agreement has been given to the research being carried out in the department stated in the Application, that the Applicant will be given the necessary accommodation and facilities and that all necessary licences and approvals will be obtained before the Project commences.

7. You confirm that the application has been submitted with the agreement of the administrative authority of the Applicant body and you agree that it will properly administer the Grant which will be used only to support the work for which it was intended. You also confirm that the Applicant body will maintain support for this department during the period of the Grant.
8. Unless otherwise agreed, the first payment in respect of the Grant must be claimed within one year of the date of the award _____ . If it is not claimed within one year, your entitlement to the Grant shall cease as soon as that one year period expires.
9. The Project is planned to start _____ .
The Project is scheduled to be completed by _____ .
The final claims for expenditure on the Project must be received within six months of the end of the Project otherwise entitlement to any outstanding balances of Grant will cease when that period expires.
Extensions to the Project (for time only) will require written authorisation from the Evelyn Trust.
10. The Grant will not be increased for any reason.
11. In the event that the total expenditure is less than the value of the Grant, only the actual expenditure will be met. The balance of the Grant agreed will then be withdrawn. If you have been paid all or any of that balance, you must repay it to the Evelyn Trust promptly upon demand. Any late repayment will be subject to interest as provided in paragraph 2 above.
12. As outlined below under “progress reports and monitoring” it is a condition of the Grant that the Evelyn Trust is kept informed as to the progress of the Project in a manner and form required by the Evelyn Trust. You must advise us immediately if material issues arise which could hamper or impair your ability to complete the work set out in your application. The Principal Investigator also agrees to advise the Evelyn Trust of any change to his/her status within the Applicant body, or any scientific, managerial or administrative issue, which might affect the direction of the research or the Project.

13. If the Project is cancelled or does not take place in a reasonable time, you must promptly upon demand repay to The Evelyn Trust all sums already paid unless a lesser sum is agreed by the Evelyn Trust. Any late payment shall be subject to interest as provided in paragraph 2 above.

14. The Grant will be paid in an agreed number of instalments on:

- Written confirmation that all funds for the Project or phase of the Project are available;
- Written evidence that all ethical and other approvals have been received;
- Written confirmation that building work / equipment to the value in the Application was completed / ordered after the date of the award;
- Sight of paid invoices (where requested by us) or records of charges for consumables and other Project expenses for each expenditure heading as set out in the Application;
- Evidence of time spent on the Project (where requested by us) and salary costs allocated to it, by individual, and evidence that the work has been completed.

15. All applications for payment (or invoices) will need to include supporting analyses of costs that correspond to the headings of expenditure contained in the Application together with explanations of how the expenditure relates to the Project stage(s).

(This paragraph will certainly need to be varied to suit each successful application)

16. In the case of Capital Projects, the following additional conditions also apply:

- The design, fabric and costs of any building work must be acceptable to the Evelyn Trust and, where applicable, the landlord / freeholder of the property;
- The new or renovated building will be properly maintained;

- In the case of building work, the Grant will be paid on sight of architects' certificates (or other firm evidence acceptable to the Trustees) showing that work to the value of the Grant, or greater, has been successfully completed;
- Evidence acceptable to the Evelyn Trust that equipment has been properly installed and is functioning properly and that staff using it have received proper training.

17. The Principal Investigator and other members of the Project team shall keep sufficient diaries, notebooks or logs to enable qualified reviewers to establish whether their work was proceeding in accordance with the objects of the research programme set out in the Application.

18. The Evelyn Trust may upon written notice demand the immediate repayment of all sums paid under the grant if the Trustees of the Evelyn Trust believe that such sums are being misapplied or that the Project is not being conducted properly. Any late repayment shall be subject to interest as provided in paragraph 2 above.

PROGRESS REPORTS AND MONITORING

19. It is the policy of the Trustees to monitor all Grants made. Accordingly the Applicant must submit periodic reports of the progress of the Project as the Evelyn Trust may require. Continued financial support from the Evelyn Trust will be dependent upon the timely submission of reports and amounts may be withheld from payment applications pending receipt of such reports.

20. Monitoring visits (and audits of how grant monies are being spent) by Trustees of the Evelyn Trust or their representatives may also be conducted, should the Trustees consider this necessary owing to the size or nature of the Project.

21. Trustees will usually ask for a preliminary report at six months and an annual report at the anniversary and annually thereafter. Within six months of the conclusion of the Project, a final report (End Of Grant Evaluation Report) will be required, detailing fully the results and

outputs of the Project, as well as a detailed account of the costs incurred. The Head of Department (or his/her successor), will be required to vouch for the research that has been completed by signing the final report at the end of the grant period.

PUBLICITY

22. The Evelyn Trust wishes to widen public awareness of its work to support medical endeavours in Cambridgeshire and to further establish its reputation as a successful, respected grant-giving charity. To this end the Evelyn Trust requires public acknowledgement in respect of the Project and seeks opportunities to permanently link the Evelyn Trust name with the Project whenever possible.
23. The Applicant will therefore liaise closely with the Evelyn Trust to explore any publicity opportunities that may arise. The Evelyn Trust's name must not be used in any publicity without the specific permission of the Evelyn Trust, which it would normally be pleased to give.

LIABILITY

24. The Evelyn Trust and its Trustees will not be liable in any way whatsoever for the conduct or outcome of the Project or any activity set out in the Application to which monies contributed pursuant to this Grant may be applied and you hereby indemnify and hold harmless The Evelyn Trust's Trustees and all representatives of The Evelyn Trust against any liability which may arise in connection with the conduct of the Project or activity associated with it or the use or exploitation of any results generated from it.

COMMERCIAL EXPLOITATION

25. In the event that the work funded by the Grant on the Project leads in whole or in part to commercially exploitable products or services or rights, The Evelyn Trust will be entitled to receive a proportion of any revenue, payment or other commercial gain arising, which will be calculated as follows:

- gross income less all reasonable costs of exploitation (including patent, legal and incidental expenses);
- less any amounts properly due to individuals involved in the Project working for the Applicant;
- a proportion of the net income after taking the above into account will then be transferred to the Evelyn Trust in the proportion which the Grant bears to the total Project cost.

ACCEPTANCE OF THE OFFER AND PAYMENT PROCEDURES

We confirm that we are willing to accept the grant on the above conditions:

PRINCIPAL INVESTIGATOR ("APPLICANT") AND CO-APPLICANTS

Principal investigator's name (print): Signature: Date:
.....

Co-applicant's name(s) (print): Signature(s): Date:
.....
.....
.....
.....

HEAD OF ACADEMIC OR CLINICAL DEPARTMENT IN WHICH THE RESEARCH WILL BE UNDERTAKEN

Head of department's name (print): Signature: Date:
.....

ADMINISTRATIVE AUTHORITY OF APPLICANT BODY (e.g. Charity Director, Company Director, University Grants Administrator, NHS R&D Director, NHS Trust Authorised Signatory)

Name (print): Signature: Date:
.....
.....

Position: Institution:
.....

Payment will normally be made to a UK registered charity through a UK bank. Please provide details of the bank to which payment should be made, as follows:

Name and address of the bank:

Sort Code

Account number

Account name: