

Sovereign Health Care Charitable Trust guidelines for applicants - 2012

The money that Sovereign Health Care Charitable Trust donates comes from the health insurance company, Sovereign Health Care. This company doesn't have shareholders; any surplus it makes is reinvested in the company or given by Gift Aid to the charitable trust.

The trustees are therefore very conscious that the money they have to spend comes from the trading activities of a company that is based in Bradford, that has customers who mainly live in Yorkshire, and that has been concerned with the health and well-being of local people for over 135 years. The charitable trust's current priorities and practices reflect this.

Please remember that Sovereign Health Care Charitable Trust receives many more applications than it can fund. The trustees often have to make difficult decisions and may have to turn down appeals for good causes, even those that fully meet the trust's priorities.

Priorities

Sovereign Health Care Charitable Trust funds work that is wholly charitable and usually undertaken either by registered charities or by organisations that have been established for charitable purposes, are properly constituted and have a bank account. In general the trust favours initiatives that touch people's lives and clearly make a difference. As long as there is evidence that the organisation is continuing to deliver an effective service, the trust is happy to contribute to the general running costs of some organisations on a regular basis.

The trust is prepared to consider applications from **national** charities if the application is for work that is medical or health-related. Please note:

- Applications where there is a clear benefit to people in the Yorkshire area are more likely to be funded.
- Applications related to conditions or diseases that are particularly prevalent in the Bradford area are especially welcome.
- Grants are usually quite modest – a few thousand pounds at most. Large medical research initiatives where the trust's contribution would not be significant are unlikely to be a high priority.

The majority of grants made are to **local, district or regional** (Yorkshire) activities, with a bias towards Bradford.

- Applications for the work of local groups, hospitals, hospices and other good causes that are not from the Yorkshire area are unlikely to be supported.
- Applications that are health related (in a broad sense) are most likely to be funded. The trustees recognise that improving the health and well-being of people, especially disadvantaged people, is sometimes best undertaken through initiatives that tackle general social welfare needs as well.
- Although the trust sometimes makes quite large donations (particularly to hospitals and related institutions), most of its grants are for a couple of thousand pounds or less – quite often a few hundred pounds.

Applying

The charitable trust is keen not to burden the organisations it supports with too much paper work and 'jumping through hoops'. On the other hand, just sending a newsletter in the hope that this will trigger a cheque in return is unlikely to succeed. The trustees need to know what you do, what you want money for, how much it's going to cost and, when appropriate, how you'll know that the money has made a difference. There is no application form; just write to the trust with the appropriate information. The kind of detail the trust expects from a local

primary school wanting a couple of hundred pounds will be different from the information it expects from a large charity wanting several thousand pounds for a new initiative.

Trustees meet six times a year. From the trust receiving an application to the applicant receiving a cheque (or not) usually takes about two or three months. In the case of disasters and emergencies the trust may be able to act much more quickly. The trust notifies all applicants about the outcome of their request.

Send applications to:

Sovereign Health Care Charitable Trust
Royal Standard House
26 Manningham Lane
Bradford
BD1 3DN

Frequently Asked Questions

- Q Does the charitable trust fund individuals?**
Not usually, although the trust is happy to receive applications from **organisations** that provide support to individuals. For instance, the trust made a grant to a charity for bursaries to help West Yorkshire people with disabilities pay for an activity holiday.
- Q Does the charitable trust undertake sponsorship?**
The trust does not sponsor individual people nor does it usually enter into sponsorship agreements with charities (for example to sponsor a fundraising event like a charity dinner). Sovereign Health Care, the health insurance company, does sometimes sponsor these kinds of events, but the money does not come from the charitable trust.
- Q If we've had a grant from the charitable trust in the past, how long before we can apply again?**
There's no hard and fast rule but the trustees would normally expect the organisation to wait a year before applying again.
- Q If we've been turned down by the charitable trust, can we apply again?**
There is nothing to stop you. However, if you weren't a high priority the first time around, you probably won't be the next time. If you think you really are the kind of organisation that the trust is interested in supporting, you could email the charitable trust (charity@sovereignhealthcare.co.uk) asking for feedback on your failed application.
- Q Should we send our latest annual report and accounts with our application?**
The trust is likely to look at the copy of your latest report and accounts if it is available on the Charity Commission's website. If it's not available (you're a small charity or not a registered charity at all), then it would be helpful to have some figures about the organisation's finances, as well as figures about the work or activity you want the funding for. If you're in a difficult financial situation, explain what's going on and the steps you are taking to improve things. Conversely, if your accounts show huge "free" reserves, you might want to explain why you still need a grant.
- Q Can we apply to other funders at the same time as we apply to Sovereign Health Care Charitable Trust?**
Yes. The charitable trust is usually happy to be one of a number of funders supporting a project. If you've asked for funding for something very specific and you end up with too much money, just get in touch and explain. There may be some other way of using the grant from the charitable trust.