



THE
WOLFSON
FOUNDATION



STAGE TWO APPLICATION GUIDELINES

www.wolfson.org.uk

STAGE TWO: APPLICATION GUIDELINES

The Wolfson Foundation is a grant-making charity that aims to support excellence, generally through the funding of capital infrastructure in the fields of science & medicine, education, the arts & humanities, and health & disability.

We operate a two stage application process. These guidelines are issued to organisations that have been invited to submit a Stage Two application and are accompanied by a *Summary Sheet*. Please be in touch with the grants team if you have any queries about your application or visit our website (www.wolfson.org.uk).

If there have been any significant changes to your project since the submission of your Stage One application, please contact us before completing a Stage Two application.

DEADLINES

Stage Two applications should arrive by one of the deadline dates of **1 March** (for a June decision) and **1 September** (for a December decision), unless another deadline date has been indicated.

KEY CRITERIA

Key criteria used to assess applications include: the excellence of the organisation; the anticipated outcomes of the project; financial viability and match funding; value for money; adequate provision for ongoing costs and maintenance, and the aesthetics of any building project.

CONTENT

All Stage Two applications should contain the following:

1. COVER LETTER

A cover letter signed by the Chief Executive or equivalent (a copy of which should be attached to each copy of your application).

2. ORGANISATION PROFILE

A brief introduction to the organisation (or department, if relevant). It may be helpful to provide a short background, including history and notable achievements, as well as current aims and future plans.

3. PROJECT DETAILS

- a) A brief summary (in lay terms) of the project. This should focus on the specific area for which funds are being sought, but should be presented in the context of the wider project, if relevant. If the project is not based at the organisation's main address, please make clear the location of the project.

Please note that the letter inviting a full Stage Two application may indicate specific areas of the project on which the application should focus, and may request additional information not detailed in these guidelines.
- b) The aims and anticipated outcomes of the project. These should be listed as bullet points, and an example is available at www.wolfson.org.uk/outcomes. At least one of the anticipated outcomes should be one of those listed under the funding area to which you have been invited to apply, with an explanation of how your project relates to this outcome (see the relevant page at www.wolfson.org.uk/funding).

If your application for a grant is successful, you will be asked to report on the project's progress in relation to these aims, in order to help us to evaluate the impact of the grant.
- c) An indication of the timetable for the project. Please note that awards are not made retrospectively. The project must be ongoing after the date of the award and grants are paid in arrears on receipt of invoices.
- d) An artist's impression of the building, for any major new build projects.
- e) Additional information specific to the relevant funding area (see page 4).

4. FINANCE

- a) The total cost of the project, including a cost breakdown. Professional fees and VAT should be indicated separately.
- b) The amount and source of funds already received and/or pledged, and the plan for raising the balance. Please also include a list of any forthcoming funding decisions (with dates).
- c) Estimates of the subsequent running and maintenance costs of the completed project and an explanation of how these will be met.
- d) Assurance that the project has been/will be subject to competitive tender.
- e) Cost per room/area (even if estimated) for building and renovation projects and costs of fixtures and fittings or equipment. (Applicants are not generally encouraged to request a specific amount, however the Foundation may link an award to a discrete aspect of the project).

An example of how to present your project's financial information is available at www.wolfson.org.uk/finance

5. REVIEWER (optional)

Applicants may nominate an independent reviewer, who should have some knowledge of the proposed project and be aware of the application to the Wolfson Foundation. Please provide their name, address, telephone number and email address on your *Summary Sheet*. Further details on selection of a reviewer are available on our website (www.wolfson.org.uk/funding/faqs).

There is no obligation to nominate a reviewer.

The application will also be sent to independent reviewers chosen by the Foundation.

FORMAT

1. Applications should be **no longer than 6 sides** (excluding cover letter) on **A4 size** paper. Text should be no smaller than font size 12 and printed on both sides, where possible. Applications should be collated and secured with treasury tags.
2. Technical or further information may be attached as appendices, for example images of building plans. These appendices should be kept as concise as possible and be no larger than A4.
3. Applications must be stand-alone documents (i.e. not reliant on information previously provided or contained in other documents such as promotional flyers, annual reports, etc.).
4. We require **multiple** copies of the application. Arts and Humanities applications – 15 copies; Science and Medicine applications – 18 copies; Health and Disability application – 7 copies.
5. Please return with your application a **single copy** of the *Summary Sheet* provided with this leaflet. It should include details of the person who may be contacted in case of a query about the application.
6. If you have been requested to submit an electronic copy of your application, it should be sent as a single file, including all appendices and any covering letters, excluding the summary sheet (which should be sent as a separate document).

REVIEW PROCESS

Once received, applications are considered in detail by expert reviewers and a specialist panel who make recommendations to the full Board of Trustees. During this stage we may ask you to supply further information or respond to queries that have been raised.

ADDITIONAL INFORMATION BY FUNDING AREA:

ARTS & HUMANITIES – 15 copies

Museum and gallery proposals

Please provide the latest annual visitor figures or, for new initiatives, an estimate including a short justification. Please include images and plans of museum/gallery projects. You should also provide details of the collections that will occupy new or refurbished spaces (including some images).

Historic building proposals

Please specify the date of the building, its listed building grade and significance in a national context. Please include a recent photograph and, where relevant, annual visitor figures. Please also provide information on planning permission/consents, expert advice sought on both conservation and interpretation, and planned public access.

Music and performing arts proposals

Please provide brief details of your artistic programme.

SCIENCE & MEDICINE – 18 copies

Medical/Scientific research proposals

Please provide an appendix (for assessment by expert reviewers) describing the science for which the building or equipment is requested, and covering both past achievements and future directions. This appendix may extend to a maximum of 15 sides of A4 (although if possible can be considerably shorter). The principal scientists' one page CVs (including references to key publications) should also be attached.

Public Engagement with Science

Please provide information about the scientific subject that will be presented and how it will be interpreted for the public. If it is a museum or other attraction that is open to the public, please describe the latest annual visitor numbers or, for new initiatives, an estimate including a short justification. Please include images and plans of the museum/attraction. If it is a museum, you should also provide details of the collections that will occupy the new or refurbished spaces.

HEALTH & DISABILITY – 7 copies

Please demonstrate clearly the need for the project (whether a new initiative or an expansion of existing services). Please include a description of the selection and/or referral policy for users of the facilities, where appropriate, and the systems in place for monitoring standards of care.

Applications that do not conform to these guidelines may not be accepted.

These guidelines also apply, where relevant, to applications to the Wolfson Family Charitable Trust (registered charity no. 228382), a sister charity of the Wolfson Foundation.



The Wolfson Foundation was established in 1955. Since then, over £800 million (£1.7 billion in real terms) has been allocated to some 10,000 projects across the UK.

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