
Additional information required for projects within specific areas:

Medical/ scientific research proposals

Please provide an appendix (for assessment by expert referees) describing the science for which the building or equipment is requested, and covering both past achievements and future directions. The principal scientists' one page CVs (including references to key publications) should also be attached. The appendix should be kept as short as possible.

Special needs proposals

Please include a description of the selection policy for users of the facilities, where appropriate, and the systems in place to monitor standards of care.

Hospice proposals

Please include a letter of support from your local palliative care network.

Museum and gallery proposals

Please submit the latest annual visitor figures or, for new initiatives, an estimate including a short justification.

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.

These guidelines also apply, where relevant, to applications to the Wolfson Family Charitable Trust, a sister trust of the Wolfson Foundation.

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THE WOLFSON FOUNDATION

Applying for a grant



Introduction

The Wolfson Foundation is a grant-making charity that was established in 1955. It aims to support excellence, generally through the funding of capital infrastructure in the fields of science and medicine, health, education and the arts & humanities. Further information is available at www.wolfson.org.uk

The Wolfson Foundation operates a two stage application process. The aim of the first stage is to determine whether a project is eligible. These guidance notes are designed for organisations that have been formally invited to submit a full (second stage) application.

We deliberately avoid asking applicants to complete an application form, or being over-prescriptive on the format.

Once received, applications are considered by expert reviewers and a specialist panel who make recommendations to the full Board of Trustees.

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

Please note that the letter inviting a full second stage application may indicate specific areas of the project on which the application should focus, and may request additional information not detailed in these guidelines.

Content

All applications should include the following:

1. Cover letter
A cover letter signed by the head of the organisation.
2. Organisation/department
A brief introduction to the organisation (or department, if relevant). It may be helpful to provide a short background, including history and notable achievements.
3. Project
 - a) A brief summary in lay terms of the aims of the project, including an account of what it intends to achieve. This should focus on the specific area for which funds are 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 include the location of the project.
 - b) An indication of the timetable for the project. Please note that awards are not made retrospectively, and that the project must be ongoing after the date of the award.
 - c) An artist's impression of the building (for any major new build projects).
4. Finance
 - a) the total cost of the project
 - b) the amount and source of funds already received or pledged
 - c) professional fees and VAT (indicated separately)
 - d) estimates of the subsequent running and maintenance costs of the complete development and explanation of how these will be met
 - e) assurance that the project has been/will be subject to competitive tender
 - f) cost per room/area (even if estimated) for building and renovation projects, and cost of fixtures and fittings or equipment. (Applicants are not generally encouraged to request a specific amount. An award may however be linked to a discrete aspect of the project. Applications should therefore contain a list of costed rooms/areas at a range of values.)

5. Reviewer (optional)
An independent reviewer may be nominated, who should have some knowledge of the proposed project and be aware of the application to the Wolfson Foundation. Please provide name, address, telephone number and email address. The application will in addition be sent to other experts chosen by the Foundation.

Format

1. Applications should be **no longer than 5 sides** (excluding the cover letter). In addition, technical or further information may be annexed but should be kept as brief as possible.
2. 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.).
3. Pages should be no larger than A4. Text should be, where possible, **printed on both sides** of standard weight paper. Applications should be collated and secured with treasury tags.
4. We require **multiple** copies of the application. Please send 18 copies for science or medicine applications, 15 copies for special needs or hospice applications, or 12 copies for arts, humanities or education applications. We may occasionally request additional copies.
5. Please return with your applications a **single** copy of the summary sheet. This should not be attached to each application as it is for administrative purposes only. It should include details of the person who may be contacted in case of a query about the application.

Applications should arrive by one of the deadline dates of 1 March (for a June decision) and 1 September (for a December decision), or as notified.

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