

Funding Guidelines

This document outlines what we want to fund and is reviewed on an annual basis. We make updates to this document based on the feedback we receive in order to ensure clarity.

All of this information is also available [on our website which can be accessed by clicking here](#). If you would like to make an application, please use our [online portal which can be accessed by clicking here](#). Before you do so, please review this document or our website for further information about the grants we make and how to apply. You can also see [a PDF version of our 1st and 2nd stage application forms by clicking here](#). If you have any additional queries, please feel free to contact a member of the team.

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Introduction

Our overarching aim as an organisation is to advance wellbeing for people, society and the natural world. These funding guidelines relate to our strategy for 2025 to 2030. You can [read our strategy in full by clicking here](#). The focus of our current strategy is to respond to this age of significant disruption and interconnected global threats. These guidelines explain how we intend to deliver on this through our grantmaking.

In our grantmaking, we want to support charitable organisations that at their core are committed to ensuring the rights of people, society and the natural world for current and future generations. These guidelines outline in detail what we mean by this.

Who can apply

We are a small grantmaker that receives many more applications than we can support. Between 2020/21 and 2024/2025 our grant application numbers increased from 251 to 500 first stage applications. We were unable to increase our grantmaking budget to meet this demand, as we are struggling to secure target financial returns of inflation plus four per cent from our investments. This level of demand means we can only fund the applications that demonstrate the strongest fit with our criteria. We publish our application success rates annually in our annual report and accounts.

Basic eligibility criteria

For your application to be considered, you must meet all of the following eligibility criteria. We are unable to make exceptions to these criteria, due to the volume of applications we receive.

1. Have an annual income of between £100,000 and £10,000,000, and have published accounts that evidence this. We do not fund organisations below or above this income range. The only exception to this is for environmental organisations acting as intermediaries for work happening in the UK Overseas Territories.
2. Be a UK registered charity. If you are a campaigning organisation that has strong and clear reasons for not being a UK-registered charity, including not being able to register, then you can apply to us as a company limited by guarantee, including CICs, with an asset lock or as a fiscally hosted organisation. You must meet all of our other funding criteria. See our 'Frequently asked questions and useful links' section at the end of this document for more detail.
3. Be within our geographic remit. You must EITHER:
 - a. Have an impact at a national or UK level and be based in the UK. Your organisation can be from any part of the UK and must evidence the difference the work you are doing is having at a national or UK level. National level means your work has an impact across Northern Ireland, Wales, Scotland or England only. UK level impact means your work has an impact across two or more of the nations. If you are a local organisation making a difference locally only, without having any influence nationally or at a UK level, then your application will not be successful.

OR

- b. Be delivering environmental work related to the triple planetary crisis in the UK Overseas Territories. More detail about applying for work relating to the UK Overseas Territories can be found in the 'Frequently asked questions and useful links' section at the end of this document.

Funding well-run organisations

We fund organisations that are well-run. For us, this means organisations that demonstrate track record of effectiveness and impact, strong governance and management, effective financial management, and are collaborative and cross-sectoral. We have set out below our views on what this means:

- Track record of effectiveness and impact – this means having a good understanding of the needs being met and how best to tackle them, i.e. an evidence base for your work; awareness of how your work adds value and relates to and complements the work of others; effective systems to monitor and review progress; a culture of learning, reflection and improvement; and being alert to opportunities for wider impact.
- Strong governance and management – this means a diverse organisation with a skilled, experienced and engaged board, and strong and inspiring leadership that is delivering on the organisation's objectives, including an understanding of the organisation's strengths and weaknesses.
- Effective financial management – this means a thorough understanding and oversight of finances across the Board and leadership team, including good financial management processes, a reserves policy that is being followed, and a demonstrable funding need, i.e. not holding excessive free reserves outside of your organisation's reserves policy, such as unspent, unrestricted or designated funds, unless there is a clear Board approved reason for doing so.
- Collaborative and cross-sectoral – this means working with others, including those with shared and different perspectives and from across different sectors, in order to work more effectively and achieve shared goals.

Before applying, you may find it helpful to complete our [eligibility quiz which can be accessed by clicking here](#). You also can refer to [our Am I Eligible alternate document by clicking here](#) if you would like to see a list of all questions and answers in a PDF instead.

What we are looking to fund

Our aim

We believe that to advance wellbeing we need to support charitable organisations that at their core are committed to ensuring the rights of people, society and the natural world for current and future generations.

What we fund

In designing this strategy, we thought carefully about the context that we are operating in. We believe that we are living in an age of significant disruption and interconnected global threats that are impacting people, society and the natural world and that the solutions to these will elicit results now, but may also require decades and multiple generations before they are fully realised.

As a grantmaker with direct experience of funding work through our previous strategies relating to the environment, social causes and the arts, we feel well placed to support charitable work that responds to ONE OR MORE of the following:

- Tackling the triple planetary crisis by mitigating and adapting to climate impacts, reducing pollution and protecting and restoring nature.

- Building greater trust and connection, reducing polarisation within society and increasing the levels of participation and influence in the political process (which is sometimes referred to as political equality).
- Promoting the development and adoption of economic models and systems that support people and planet and reduce wealth inequalities.
- Advancing equity and justice for marginalised communities impacted by the issues above.

We're looking to fund organisations that can demonstrate that intrinsic to their approach they are:

1. Chagemaking organisations.

We want to fund organisations that:

- Understand their role within existing and/or new systems* and the role systems have on people, society and the natural world.
- Have a clear strategy for how and why they intend to make change in existing and/or new systems, e.g. by challenging long-held orthodoxies and business as usual approaches, including helping us to see the world differently, or pursuing alternative and better approaches for people, society and the natural world, or having evidence-led approaches to policy, advocacy and campaigning work.
- Are rooted in practical experience alongside their chagemaking work.
- Are engaging with unpopular or difficult causes.

AND

2. Committed to advancing justice* through the active involvement of individuals and communities with personal or direct experience of the issues.

We believe a justice led approach helps to secure equity, access and rights, especially for those experiencing exclusion and the most adverse impacts of this age of significant disruption and interconnected global threats.

We want to support work that seeks to advance justice by doing one or more of the following:

- Building power and movements within communities by supporting activism work and community organising.
- Advocating for change on the 'inside track', e.g. by improving policy, legislation and/or regulatory frameworks within political, public and corporate sectors.
- Addressing the root causes of injustice, as well as the symptoms.
- Developing alternative ideas and approaches that build new narratives and public understanding of an issue.

*For more details about what we mean by 'justice' and 'systems', please see the FAQs section.

What our grants can be used for

We offer multi-year funding for core costs and accept applications for a maximum of £180k over up to five years. We provide funding of up to a maximum of £60k per year (e.g. an organisation applying for £180k would need to request this funding over a minimum of three years).

We have a small Grants Team, and take a light touch approach to grants management, which means we don't have the capacity to be an organisation's main funder. Therefore, we ask that applicants consider the amount they are requesting per year in proportion with their annual income.

Core funding is funding which goes towards the core costs of delivering an organisation's work. These costs could include:

- staff salaries, training and expenses
- day-to-day running costs and operations
- monitoring and evaluation, including research
- communications and digital innovation.

If most or all of the activity that your organisation undertakes fits with our funding criteria, and you are a UK-registered charity, then you can apply for unrestricted core funding. However, if there are aspects of your work that are not relevant, we ask that you specify where the funds would be directed to within your organisation.

It is not our preference to provide project funding, as we do not have much experience of this. Organisations applying for project grants must still demonstrate overall alignment with our funding criteria. If you think a project grant would be best, please do discuss with us first.

To get an idea of the kind of grants we have awarded in the past, take a look at the grants list on our website or on 360Giving which show the grant duration, the amount awarded and a short summary of what the grant was for.

What we do not fund

We do not consider applications from organisations that:

- do not meet our basic eligibility criteria as outlined in the 'who can apply' section
- have applied unsuccessfully within the previous 12 months (based on the date the application was submitted)
- focus on a single medical area, such as an individual disease, organ or condition
- are hospitals, hospices, schools or colleges
- are universities, unless the application is from a leading university specialist unit or a centre of excellence or leader in the field with an operating budget of between £100k and £10m, and the work demonstrates that it is distinctive, involves partnerships with charities or similar, has a budget that includes no contribution to central overheads and strongly meets our funding criteria.

Grants are **not** made to or for any of the following purposes:

- individuals, including student grants or bursaries
- general and round-robin appeals
- capital developments and individual items of equipment
- promotion of religion or places of worship
- learning and participation activities, where this is the primary focus of the application
- leisure or individual holiday schemes
- sport, where this is the core of the organisation's activities
- education, such as initiatives linked to the curriculum or educational projects
- animal welfare, captive breeding and/or animal rescue centres as the main purpose of the work
- medical research or treatment, including drug and alcohol rehabilitation services

- work based in prisons that should receive statutory funding and does not pursue wider systems change
- one-off campaigns that do not meet our funding criteria and that are not part of a clear long-term strategy for the organisation
- one-off events, such as conferences, trips, seminars, master classes, summer schools, single commissions or productions
- onward distribution of our funds as grants to other organisations, unless we have explicitly agreed to join a funder collaboration where this will happen
- work that attempts to advance the rights of one group or groups by removing the rights of another group or groups, and stokes division.

Application process, including our approach to access, and timelines

To make the best possible application, then you need to ensure that your organisation is eligible and that your work meets our funding guidelines.

We receive more applications than we are able to fund, and if you are unsuccessful we will provide feedback as to why. Unsuccessful applicants are asked to wait for one year from the date you submitted your previous application before you reapply.

To make an application to us, you need to use our online portal to create an online account. You can create a new account or log in to an existing account [by clicking here](#). Once you have created your online account and uploaded your first stage application, you will receive an instant confirmation.

Our approach to accessibility

We ask that all applicants submit a two page written application, which can be in Word or PDF format. However, if you have a specific access requirement that makes submitting in this way difficult, please do contact us and we will be happy to discuss making reasonable adjustments to the process. This includes if you are having difficulty navigating the online portal. To support applicants, we have shared a copy of the 1st and 2nd stage application forms [which can be accessed by clicking here](#). These aim to be compatible with accessibility tools, but if you would like to receive a version in a different format, please do get in touch. For all such enquiries, please reach out to beth@ellerman.org.uk.

We are actively seeking to improve our accessibility and welcome any feedback on this front. You can see more detail about our approach to accessibility in our [Accessibility Statement that can be accessed by clicking here](#) and in [this blog on our website which can be read by clicking here](#).

Application process

The application process consists of two stages:

STAGE ONE

1. Please complete a two A4 page proposal using a minimum font size of 10 with the following headings:
 - A brief summary of your organisation's aims and activities, including demonstrating that you are a well-run organisation.
 - An outline of your approach to changemaking and advancing justice through the active involvement of individuals and communities with personal or direct experience of the issues, and sharing how your work relates to one or more of the following:
 - tackling the triple planetary crisis of climate change, pollution and nature loss;
 - building greater trust and connection, reducing polarisation in society and increasing the levels of participation and influence in the political process;

- promoting the development and adoption of economic models and systems that support people and planet and reduce wealth inequalities;
 - advancing equity and justice for marginalised communities impacted by these issues.
 - What you would like us to fund and why you are well placed to do this work.
2. You will be asked to upload the following financial documents alongside the application to evidence that your annual income is above £100k and below £10m:
 - Your annual report and financial statements from the previous financial year, in draft form if necessary.
 - Your management accounts (including a full year income and expenditure budget) for the current financial year.
 - If your accounts show a significant surplus or deficit, high or low reserves outside of your reserves policy, we will ask you to provide a brief explanation.
 3. You will also be asked to submit an accompanying application form with basic data such as contact details, and information relating to the DEI Data Standard (this information is not used as part of the assessment process – please see our section on DEI later in the document for more detail).

Once you have created your online account and uploaded your first stage application you will receive an instant confirmation.

STAGE TWO

If your application proceeds to second stage, we will ask for a more detailed proposal and additional information. Then we will arrange to meet you to find out more about your work.

Timelines

We make funding decisions throughout the year, which means you can apply for funding all year. We spend evenly throughout the year and there is no 'good' or 'bad' time of year to apply to us.

We review the eligibility of applications once a month, usually in the middle of the month. If you are aiming for a specific round of eligibility checks, we suggest that you submit your application by the beginning of that month. Our Trustees work with the team in monthly 'Sifting Meetings' to review all eligible first stage applications, usually at the beginning of the month. At this meeting, they decide which applications to progress to the second stage. If you proceed to stage two then you will be given four weeks to submit your second stage proposal, and a further four weeks for us to meet with your team, totalling eight weeks for this stage. Our Trustees will then make a final decision about which applications to fund at our bi-monthly Board meetings.

Below, we set out the timelines in which we aim to respond to your application by:

- We will assess your eligibility within approximately four to six weeks of submitting your first stage application to us. If you are not eligible, we will let you know at this point.
- If you are eligible, we will undertake further assessment which we call 'sifting', and you will receive a decision on your first stage application within eight to 10 weeks of submitting your first stage application to us.
- You will receive a decision on your second stage application within four to eight weeks of submitting your second stage application to us.

The table below outlines the sequencing of these three decision points over the course of the year:

Eligibility check (middle of the month)	Sifting meetings (Beginning of the month)	Board meeting (End of the month)
September	October	January
October	November	
November	December	March
December	January	
January	February	May
February	March	
March	April	July
April	May	
May	June	September
June	July	
July	August	November
August	September	
If you are aiming for a specific round of eligibility checks, we suggest that you submit your application by the beginning of that month.	We notify applicants of the result of their first stage application by the end of the month.	We notify second stage applicants of the result of their application within 48 hours of the Board meeting.

If you are unsure about whether to apply or need further information about the application process, please call us on 020 7451 1471 or email beth@ellerman.org.uk. We are happy to offer advice on applications via phone, video call, or email.

Our values and our approach to Diversity, Equity and Inclusion

Our values

We strive to apply our five values of being responsive, flexible, discerning, connected and applying a personal touch to all aspects of our grantmaking.

Our approach to Diversity, Equity and Inclusion (DEI)

We believe that principles of DEI must guide all that we do, which can be summarised as: our recruitment, retention and progression of staff and Trustees; the management of our underlying endowment; our grantmaking; our internal and external communications; and our analysis of the origin of our wealth through our History Project.

Like many of our peers, we recognise that the failure to prioritise and improve DEI practices within institutional philanthropy and the wider charity and philanthropic sectors has led to the inequitable distribution of funding. As a sector, this failure manifests itself primarily through our non-diverse staff teams and Boards, and the ways in which our funding practices, processes and cultures disproportionately disadvantage marginalised groups – among the very groups we seek to support through our funding in the first place. You can read our [DEI Policy in full on our website by clicking here](#).

We have adopted the DEI Data Standard in our grantmaking, which means we ask applicants to provide information about DEI as part of their first stage application. The DEI Data Standard has been produced by a group of charitable funders, including us, and you can find out more about this work [by visiting the DEI Data Standard Working Group website](#)

[by clicking here](#). We are asking these questions to gain a better understanding about the kinds of organisations that are applying to us and that we go on to fund. Please note that the information provided **is not** used as part of our decision making. There is no judgment or preference for particular responses. Applicants also have the option of selecting 'prefer not to say' for this section of the application.

Frequently asked questions and useful links

The following frequently answered questions relate to information not covered elsewhere in these funding guidelines.

Does my organisation need to be a charity to apply?

If you are a campaigning organisation that has strong and clear reasons for not being a UK-registered charity, including not being able to register, then you can apply to us. We will accept applications from companies limited by guarantee, including CICs, or fiscally hosted organisations. We do not accept applications from companies limited by shares, or any of the organisation types listed in our 'What we do not fund' section. Companies limited by guarantee must have an asset lock, be able to demonstrate that they have charitable objects, and not pay dividends or excessive salaries to Directors. You must meet all of our other funding criteria. For fiscally hosted organisations, you will need to evidence that your organisation or group (rather than the fiscal hosts' aggregated income) is above £100k and below £10m. We may ask to meet with fiscal hosts, where applicable, as part of our second stage process.

Do you make grants overseas?

Yes – we support environmental work in the UK Overseas Territories (UKOTs). This is usually delivered via a pooled funder collaboration called The UKOTs Fund and different funding guidelines are applied for this work. When The UKOTs Fund is open, we will announce it via an open call. However, when the pooled fund is closed, UKOTs based organisations can also apply to us using these main funding guidelines, for environmental work related to the triple planetary crisis only. If you are considering applying for work in the UKOTs, we recommend you get in touch with us first and we will be happy to discuss a potential application.

For work in the UK Overseas Territories, we fund UK-based charities working in the UKOTs, and we are also happy to accept direct applications from Territory-registered charities, including through UK-based conduits. We aim to take a nuanced approach and distinguish between Territories based on their respective charity governance systems. In practice this means the following:

- NGOs registered in Territories with UK-modelled charity governance systems (e.g. Bermuda, Cayman Islands, Gibraltar, and St Helena) will be able to apply directly.
- Charities registered in Territories which have non-profit oversight systems that are primarily finance-focussed (e.g. Anguilla, British Virgin Islands, Montserrat, Turks & Caicos) will also be considered for direct funding. However, to ensure an extra level of compliance, NGOs from these Territories will be required to show evidence that they have been successfully accepted as the lead organisation on a UK Government Darwin Plus project grant.
- Given the minimal local charity governance we will not accept direct funding requests from NGOs which are registered solely in the Falkland Islands and will require applications to be made via a UK-registered charity.

If your Territory is not listed, or if you have any queries regarding the most appropriate application mechanism, please feel free to contact a member of the Grants Team for advice.

The Crown Dependencies of the Bailiwicks of Jersey and Guernsey which make up Channel Islands, and the Isle of Man are not part of the United Kingdom. Organisations registered in the Crown Dependencies are therefore not eligible.

How do you define 'systems' and 'systems change'?

We feel that there are two types of systems and that these will always co-exist as they each learn and grow from the other.

1. *Existing systems* are able to grow, but sometimes experience decline because they are not operating as effectively as they should and/or are not benefitting all people and our planet. These kinds of systems are sometimes described as *dominant* systems.
2. *New systems* seek out and champion new approaches and solutions to the challenges and opportunities we face. They can also be described as *emergent* systems.

Examples of systems include (but are not limited to) civil, economic, natural, and political. We want to invest in work that seeks to build on and improve the world as it is. We also want to invest in new approaches that seek to reimagine more fundamentally how the world could be. We feel the four areas we are prioritising in our current strategy all offer examples of ways of working in existing and new systems.

It is our belief that systems rely on different people from all walks of life. Some will be protecting existing systems from decline so they can continue to provide support to people, society and the natural world. There will be people highlighting the ways in which these systems are (or are not) working and why, and what we need to consider keeping and what we need to consider letting go of. Others will be focusing their energies on promoting and developing new systems due issues and frustrations within the existing systems.

We know that there are a range of ways of making change and progress within systems. We support recognised approaches to changing systems, as well as approaches that are less tried and tested or could be described as outlier or edge case approaches. We do not expect applicants to be working in every part of these systems. However, we do expect them to be able to explain which systems they seek to influence, what their place is within them, and how they aim to do so.

For more detail about our approach to systems change and changemaking, please see our strategy for 2025 to 2030 [which can be accessed by clicking here](#).

How do you define 'justice'?

We use the term 'justice' as a framework to understand the systemic root causes of issues. We see organisations in the voluntary sector regularly use 'justice' as a frame for a variety of different and intersecting issues, e.g. racial justice, climate justice, migrant justice, gender justice. Our understanding of justice relates to access to resources, equity of outcomes, participation, diversity and countering discrimination, and human rights.

When can I reapply if I have a grant? Do you provide continuation funding?

Current grant-holders can reapply up to three months before their grant end date.

Can I discuss my application with you before I apply?

We are always happy to discuss potential applications. Before you get in touch, please read our guidance. You can reach out to our team using the details on the 'Contact Us' section of our website.

Do our accounts need to be audited by an independent auditor?

Your accounts must adhere to Charity Commission guidance, and so if you are able to submit accounts that have been reviewed by an independent examiner then we will accept

these too. If you are not a registered charity, then your accounts must be reviewed as per the processes in place for your organisation type.

What does the Foundation being part of the Living Wage Funders scheme mean?

We are committed to tackling low pay by encouraging the organisations we support to pay the real Living Wage. You can [find out more about the Living Wage by clicking here](#).

We want to support our grant-holders to pay their employees the Living Wage as outlined above. Please do consider this when applying for funding to cover salaries within your proposals. The Grants Team may suggest changes to budgets where we think that the Living Wage is not being offered.

What can I do if I am unhappy about any stage of the application process?

We want organisations and the individuals submitting applications to contact us if they have feedback on our application process that could lead to improvements. We also have a Complaints Policy that you can use if you would like to make a complaint, which is available [on our website and can be accessed by clicking here](#). Complaints are managed by our Senior Grants Manager. Furthermore, every two to three years, we run an independently commissioned audit of our application process that is sent to all applicants and grant-holders – this offers a review of our application process too.

How long will we have to wait before receiving funds after having a proposal approved?

We aim to distribute the first payment of a grant as soon as possible after receiving and approving the required bank details as set out in the offer letter. The only time this is delayed is if there are conditions on the grant, for example: grant is payable upon recruitment to a role.

Can I include hyperlinks and/or images in my application?

You can include some hyperlinks to supplementary information that support what you have referred to in your application. We encourage you to offer some context for the hyperlinks, as we may not be able to read the information contained within the hyperlinked information in full. Hyperlinks should not be used as appendices to increase the overall word count of the application, but rather as an opportunity to point to already existing and publicly available information such as blog posts, news articles, or strategy documents. Images can also be used, but please note that these images will need to be included as part of the two-page limit we set for first stage application.

Here is a list of useful links that will support you with your application to us:

[Eligibility quiz](#)

[PDF version of our application forms](#)

[Our 2025 to 2030 Strategy](#)

[Link to the online application portal](#)

Further advice

If you are unsure about whether to apply or need further information about the application process, please call us on 020 7451 1472 or email beth@ellerman.org.uk. We are happy to offer advice on applications via phone, video call, or email.