

## UK Overseas Territories Fund - frequently asked questions

### Will you support work that takes place in a single Territory?

We will fund organisations working in a single Territory or whose work has impact across multiple Territories.

### Do I have to be a registered charity to apply?

We will normally only make grants to registered, excepted or exempt charities. However, we will sometimes make an exception if we feel the organisation is uniquely placed to help meet our funding objectives. We call this the 'only they can do it' test. Please contact a member of the team to discuss your application prior to making an application if this applies to your organisation.

### Do you only make grants to charities based in the UK?

While we fund UK-based charities working in the UKOTs, we are also happy to accept direct applications from Territory-registered charities or 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 (**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 (**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 or an EU BEST 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 team for advice.

### Are there other funders involved in the UK Overseas Territories Fund?

John Ellerman Foundation is leading on the design and implementation of this funding initiative, with support from a number of other mainly UK-based funders and the Environmental Funders Network. Players of People's Postcode Lottery have raised £500,000 which will be awarded through Postcode Planet Trust. We are also in active discussions with two other funders who are seeking approval for additional contributions. Joint decisions will be taken between funders involved in this collaboration in October about which applications to support.

### Do you have a preference for conservation or policy-related work?

We do not have a preference. To-date, we have supported practical conservation activity, work that strengthens environmental policy, and work that ensures the implementation of existing legislative frameworks.

### **Does the UKOTs Fund have particular focus areas?**

While we have an interest in terrestrial as well as marine-related environments, we do not focus on any particular Territories, habitats or species. We recognise the interdependence of communities, habitats and species and therefore seek to support organisations which apply this in their thinking and practice. As this is a pooled fund, and to reflect the funding interests of other funders, a small proportion of the fund may be reserved for work focussed on advancing marine community engagement and partnership-building, helping build local support to secure marine protections of marine and mangrove areas, as well improve the effective management of existing MPAs and protected mangrove forests.

### **When do you fund core costs and when do you prefer to fund a project?**

As a responsive, discerning and flexible funder, we listen to what you judge is important. Our main interest is in supporting organisations whose work matches our funding priorities. We believe that core funding is often the most valuable contribution we can make, especially in a context such as the UKOTs where such funding that is towards an organisation's core operating costs is never normally available. Core funding is a direct contribution to the core costs of an organisation, and can be spent upon any expenses, from salaries to insurance, IT and HR support to marketing materials and vehicle maintenance. Applicants should demonstrate a funding need and that they do not hold excessive free reserves, i.e. unspent and unrestricted funds. A core funding need could be demonstrated by evidencing recent in-Territory impact and outlining upcoming priorities where the organisation's ongoing presence or inputs will seek to make a difference. Note that we are particularly keen to encourage more core cost applications in this second round of funding, especially from Territory charities which have never received this type of financial support before.

If you think a project grant would be best, you can apply for that instead. We are aware that a modest core grant will have a limited impact on the finances of larger organisations, so if your turnover is close to or over £10m a year, it will likely be better to apply for a project grant.

### **When will you fund research?**

We recognise that rigorous research and policy analysis can provide the evidence and arguments to advocate for important changes in practice. We prefer to fund this sort of work if it is grounded in real life experience, includes the voices of those affected and is likely to make a practical difference. When considering such proposals, your track record, expertise, knowledge of the context and understanding of how to effect such change will be important considerations.

### **Do you fund universities?**

Not usually, and not for their core work. Exceptionally, we may consider an application from a specialist unit if you are a centre of excellence and a leader in your field. Your work should:

- be distinctive and likely to make a practical difference
- involve partnerships with charities or NGOs
- have a budget that includes no contribution to overheads
- strongly match our funding interests
- demonstrate mechanisms for openly sharing all data gathered with the relevant Territory/Territories

- evidence Territory-based demand for the work and, for inhabited Territories, long-term capacity-building.

### **How much can I apply for?**

It is our intention that this special fund will support a variety of organisations and projects, through grants ranging in size between £10k and £150k, for a period of up to three years. We anticipate making no more than one grant per organisation. However, this does not apply to organisations acting as a conduit for Territory-based NGOs.

### **When is the best time for me to apply? Do you have any deadlines?**

Unlike the majority of our grantmaking, this funding stream has a defined application window. You can submit your application between Friday 8 July and Monday 19 September 2022.

### **How quickly will I know your decision?**

We will acknowledge your application upon receipt of your proposal via our online portal. We expect to be making decisions in early October 2022, including whether we require a virtual follow-up meeting to assess your application further. Follow-up meetings will take place in October or November 2022.

### **If our organisation has applied to the Ellerman main grants programme or the 2021 UKOTs special fund unsuccessfully in the past, can we apply to this fund?**

Yes – we are accepting applications from organisations that have been rejected from John Ellerman Foundation's main grantmaking programme or the 2021 UKOTs special fund.

### **If our organisation has a grant already with Ellerman through the main grants programme or the 2021 UKOTs special fund, can we apply to this fund as well?**

Yes – we are open to accepting applications from existing John Ellerman Foundation grantees. However, in order to manage demand and competition for this UK Overseas Territories Fund, we may need to prioritise applications which are not from UK-based organisations that we are already funding.

### **If our organisation has a grant from Ellerman which has recently finished, can we apply to this fund?**

Yes – organisations with recently completed grants are welcome to apply and there is no required waiting period before submitting another application.

### **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. We are also planning to hold virtual information sessions during the application window; for further details, please consult our website.