

Joseph Rowntree Charitable Trust

1984

Beverley House, Shipton Road, York YO3 6RB. Tel: (0904) 29241

The Joseph Rowntree Charitable Trust

Joseph Rowntree (1836-1925) was a Quaker and a successful businessman, who wanted to make sure that his personal wealth was used in a worthwhile way. It was for this reason that in 1904 he set up three trusts - the Village Trust (now the Memorial Trust), the Social Service Trust, and the Charitable Trust. While they all operate from the same building, they are now entirely independent of each other. Information on the first two is available separately; this leaflet deals only with the Joseph Rowntree Charitable Trust.

Where does the money come from?

The Trust's income comes from investment earnings, most of them from the Rowntree Mackintosh confectionery and grocery company. In all other respects the Trust is entirely separate from and independent of the Company. The Trustees have a policy of gradually diversifying investments, and shares are now held in a number of other companies. In pursuing this policy, the Trust tries to ensure that it does not invest in companies which are significantly involved in brewing or tobacco, in defence contracts or in South Africa, since this would conflict with the Trust's overall aims as expressed through its grantmaking policies.

At the time this leaflet was prepared, the Trust's annual income amounted to approximately £820,000.

A Note about Trustees

Usually there are about twelve Trustees, drawn from amongst members of the Society of Friends (Quakers), or from those closely in sympathy with the Society. The names of individual Trustees may be found in the Directory of Grant-Making Trusts, or in the Trust's own reports. At the time this leaflet was being prepared, there were five women and five men Trustees, with an age range of 30 to 65. Trustees are closely involved in the selection of projects to be funded, and all grant refusals come to the Trustees for ratification at a full Trust meeting.

What kind of projects does the Trust support?

As a registered charity, the Trust has certain tax privileges, and confines its giving to purposes accepted in law as charitable. Trustees' decisions are informed by the fact that they are members of the Society of Friends (Quakers). The Trust prefers to support practical work which will assist, in Joseph Rowntree's words, in 'searching out... underlying causes' of problems, rather than narrow academic research or the provision of direct relief. This leads Trustees to support innovatory projects, in order to help them get established, rather than supporting work which is well-proven and should be the responsibility of others.

The ways in which Trustees interpret the wishes of the founder vary from time to time as society's needs change. Periodic Trust Reports are published, and these provide an account of projects supported. At the time of writing, the Trust is mainly concerned with:

1. Work aimed at promoting the creation of a peaceable society, and international understanding.

2. Promoting peaceful change and development in Southern Africa.
3. Supporting constructive attitudes and non-violent approaches to the problems of Northern Ireland, particularly in the fields of education and justice.
4. Developing innovatory approaches in education and social development. Recently, Trust grants have supported practical projects which contribute to the development of:
 - A multi-racial society
 - New approaches to meeting some of the needs of children and families
 - Strategies to tackle unemployment, particularly in the northern part of the country
 - Responsible corporate behaviour in the private and public sectors
 - Strategies to help those who are the victims of educational disadvantage.

What the Trust won't support

Generally the Trust:

1. Does **not** make grants for buildings or equipment.
2. Does **not** provide educational bursaries.
3. Does **not** respond to general appeals.
4. Does **not** provide grants for academic research.
5. Does **not** support work in the arts, environmental conservation, job creation, local work in London and the South East, travel/adventure projects.
6. Does **not** support larger well-established national charities.
7. Does **not** support those established social care projects which should probably be the responsibility of the State.
8. Does **not** make grants to replace withdrawn or expired statutory funding, or to make up deficits already incurred.

How to apply for a Trust grant

There is no application form for Trust grants but the following points should be taken into account:

1. Applications should be no longer than four A4 sides in length.
 2. Supporting material may be sent, but this is unlikely to be seen by Trustees.
 3. Applications should include the following:
 - A short general description of the project and statement of aims.
 - A budget broken down under different expenditure headings, showing whether inflation has been allowed for, if the grant is for more than one year, and indicating what part of the budget is requested from the Trust.
 - The names of any other agencies that may be likely to contribute to the cost of the project, and an indication of where money will come from when any funding from the Trust runs out.
 - Information on how the progress of the project is to be monitored and, if possible, evaluated, and made known to others.
 - If the project is an on-going one, the most recent set of audited accounts.
- The Trust sometimes seeks an independent expert view of particular applications: this consultation is always carried out in confidence.

What are Trustees looking for?

Many worthwhile applications in the Trust have to be refused simply because resources are limited. In trying to decide rationally where to offer support, Trustees will look for evidence of:

- Clear, relevant and realistic objectives.
- The competence to achieve them.
- Potential for replication of the innovative aspects of a project.
- The effect that a Trust grant is likely to have on other potential funding resources.
- Where necessary a medium/long term funding strategy.

How long does it take?

The Trust meets in March, June, September and December each year but for applications to be considered it is usually necessary for the Trust to receive them two months in advance. For many applications, especially those involving salaries, or funding over a period of two to three years, it may be necessary for the applicant to meet representatives of the Trust, who may be Trustees or staff, or both. Where an application is clearly outside the Trust's field of involvement, a response is sent as promptly as possible.

Joseph Rowntree Charitable Trust
 Beverley House, Shipton Road, York, YO3 6RB (Tel: (0904) 29241
 Secretary: Steven Burkeman. Assistant Secretary: A. Wallis Johnson.

The Joseph Rowntree Charitable Trust

BEVERLEY HOUSE SHIPTON ROAD YORK YO3 6RB

4th September 1985

Stephen Lowry,
The Peace Project,
P.O. Box 941,
Pretoria 0001,
South Africa.

Dear Steve,

It was good to meet you yesterday and to hear something of the work of the End Conscription Campaign. I am writing now formally to acknowledge the application to the Trust which will go forward for consideration for a meeting to be held early in December. I have also today written to the Cadbury Trusts, Clarks, and the Friends Ambulance Unit enclosing copies of the application. The addresses of those bodies are on the attached sheet in case you need to correspond further with them. I have asked them to contact you directly. I shall also be discussing the application with Pratap Chitnis, Director of the Joseph Rowntree Social Service Trust.

Hopefully, out of all this something might emerge!

For the time being, then, we wish you and your colleagues in the Campaign well at this very difficult time. I will write again when there is something else to report.

With good wishes,

Yours sincerely,



Steven Burkeman
Secretary

SB/ML

Barrow and Geraldine S. Cadbury Trust,
2 College Walk,
Selly Oak,
Birmingham.
B29 6LE

Friends Ambulance Unit,
c/o Clifford Barnard,
Friends House,
Euston Road,
London NW1 2BJ

Richard Clark,
The Clark Foundation,
C & J Clark Ltd.,
Street,
Somerset.

End Conscription Campaign

227/9 Khotso House
42 De Villiers Street
Johannesburg
2000
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Telex: 4-86519 S.A.

18 June 1986

Steve Burkeman
Secretary
The Joseph Rowntree Charitable Trust

Dear Steve

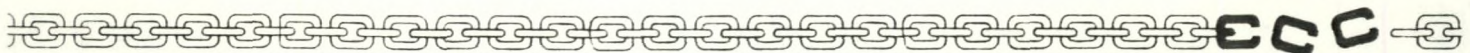
A thousand apologies for such a late response to the donation made by the trust towards our campaign. I eventually did receive the cheques for £ 2 500,00 which was R 3 708,50 in local currency. I have also been led to believe that you are considering a second grant for the same amount for the second half of the year. This will also be greatly appreciated.

Our campaign has been going very well with three new branches being established in East London, Stellenbosch and Pretoria. The latter two regions are significant in that they represent an outreach to the Afrikaans community which has not been achieved to date. It is very exciting work taking the campaign into this community, although it also presents many difficulties. However, the work continues at full steam. At the moment we are fearing a bit of a crack-down in the time leading to the commemoration services on the 10th anniversary of the Soweto uprising. I don't think however that this will be too problematic. It just means that one must move home for a couple of days.

Again, thank-you very much for your support. I shall be sending out copies of our material soon, so that you can get a clearer idea of how the campaign is progressing.

Yours in Peace and Solidarity

Stephen Lowry
National Treasurer



End Conscription Campaign

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