



STONEHAGE FLEMING CHARITABLE FOUNDATION

WHO CAN APPLY AND HOW

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Stonehage Fleming Charitable Foundation (“SFCF”) considers applications for funding from clients and staff of Stonehage Fleming as well as external parties, organisations and institutions.

SELECTION CRITERIA AND PROCESS

This document outlines the key criteria the Trustees contemplate, when considering whether to make a donation.

We hope that through our involvement, significant social impact and sound governance will emerge as the key trademarks of all projects we support.

We insist on the highest standards of quality when selecting and monitoring the projects we support. All successful applicants must provide regular progress update reports, as well as a completion report when the funding comes to an end.

APPLICATION PROCESS & REVIEW

The SFCF reviews all of its outstanding commitments as well as new requests for support on an annual basis.

Applications should be made a year in advance of the anticipated funding requirement. Applications must be submitted by 30 November each year.

Each application will be reviewed in detail and assessed by the Trustees. Unfortunately, due to the vast volume of applications, we can ONLY respond to successful applicants. These will be notified by 31 March of the following year.

Applications should be addressed made by way of letter addressed to the Trustees of SFCF and sent to enquiries@SFcharitablefoundation.org. PLEASE NOTE: there is NO official application form. Applications should cover the below criteria in their application.

KEY CRITERIA

1. Categorical fit

Sponsorship preference is given to causes primarily in the fields of education, healthcare, social and sport development. Applicants should identify which of the four categories their requests fall within and demonstrate this connection.

2. Form of donation

Applicants should clearly set out the nature of their request e.g. whether the donation is for an event, student scholarships, ongoing support or a one-off donation for a specific project.

Where ongoing support is requested, and so as to be able to assist as many projects as possible, funding is generally limited to a maximum period of 5 years or until such time as the initiative has become self-sustaining and is able to generate and engage other sponsors and supporters.

Applicants should identify the period of time over which they wish to receive support from SFCF. For example, if it is a student scholarship system, the length of the degree as well as how much it would cost to sponsor each student per year would be required.

In some circumstances projects may be considered for longer term support if they demonstrate high potential for success and the project is consistent with long terms objectives of the SFCF.

3. Objectives

The SFCF's policy is to support projects in a manner that serves to contribute at an early stage and which involve local community participation.

Applicants should seek to demonstrate that their project is sustainable and has the potential to continue beyond the terms of the support granted by the SFCF (for example by generating support from other donors).

Preference will give given to projects which operate broadly within the same global spheres as the Stonehage Fleming Group.

