



THE
HARGREAVES
FOUNDATION

**FURTHER INFORMATION
FOR APPLICANTS**

ABOUT US

The Hargreaves Foundation (Registered Charity: 1187297) is a grant-making charitable foundation set up in 2020 by Peter Hargreaves. Born in 1946 in Clitheroe, Lancashire, Peter Hargreaves attended the local grammar school and went on to train as an accountant. He remains the single largest shareholder of Hargreaves Lansdown - the FTSE100 financial services firm he co-founded in 1981. He stepped down as Chief Executive in 2010 and retired from the Board in 2015. The Foundation is funded through a transfer of shares held by Peter Hargreaves totalling around £100m, with the intention of further meaningful grants over time. The dividend income – likely to be around £2 million per year will be distributed as grants.

Together with his children, Robert and Louisa, the Hargreaves family will help transform young lives through sport and education via The Hargreaves Foundation.

"As a family, we have all benefited from education and our love of participatory sport. We will seek to support people, programmes and initiatives to achieve these goals and make a meaningful difference to many young people's lives." Peter Hargreaves, 2020

The Foundation's objectives are underpinned by the desire to give those under the age of 18, and living with a mental health condition, disability, or growing up in poverty, the opportunity to fulfil their potential whilst improving wellbeing, self-esteem and independence.



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ELIGIBILITY: Projects & Initiatives

All requests must fit with our objective:

Transforming young lives through sport and education.

In addition, requests must address one or more of the following priorities:

- Enables individuals to experience the mental and physical health benefits of participatory sport
- Ensures participatory sport is accessible (accessibility includes affordability)
- Provides sporting or educational activities that foster life skills
- Aims to improve academic engagement and attainment
- Encourages the development of skills and personal attributes to aid future employability

Example: The Change Foundation – funding for the Netball 4 Change project. Our grant will support vulnerable young women to learn about online safety through the rules and game of netball.



The Foundation funds clearly defined projects, initiatives or the purchase of specific items. These must be one-off e.g. purchase of equipment or time-limited with the activity or project being completed within 12 months.

Any activity must take place in UK.

Successful applications will clearly show how they are connected to participatory sport or education. We do not fund general activity such as after school clubs, mentoring, youth clubs and counselling.

Those benefiting must be aged under 18 and living with a mental health condition, disability, or growing up in poverty. We ask applicants to demonstrate poverty using recognised indicators such as being eligible for free school meals or a college bursary for those aged between 16 and 18 years or, for early years, living in a household that has less than 60% median household income (after housing costs and allowing for the additional costs of any disability). However, we don't just want general statistics for a geographical area, we want to know about the situation of the individual young people who are being supported.

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We will only consider funding projects, initiatives or items where under 18s who meet our criteria are the primary focus. This means we will not consider requests which benefit mixed ages or mixed groups, where under 18s who meet our criteria happen to be in the majority. Instead we expect the whole purpose and focus to be about supporting young people who are under 18 and living with a mental health condition, disability, or growing up in poverty.

We have no maximum or minimum grant size. We will consider contributions to larger projects. It will need to be clear what our funding will cover. If successful, we will pledge and won't pay a grant until all the funds needed are secured.

We want to fund life-changing interventions that make a material difference in the lives of young people. We will fund:

- ✓ Projects, initiatives or the purchase of specific items
- ✓ Projects that fit with our objective and priorities
- ✓ Projects that involve participatory sport or education
- ✓ Projects where the primary focus is under 18s living with a mental health condition, disability, or growing up in poverty
- ✓ One-off, time-limited projects

Example: Tall Ships Youth Trust –
funding of two voyages for 16-18 year olds
Tall Ships Youth Trust works with young people from across the UK, helping them redefine their horizons. Out at sea they are encouraged to grow in confidence and develop skills which set them up for life; teamwork, social skills and leadership.



- ✓ Training for staff/volunteers
- ✓ Residential activities

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Example: Ashcombe Primary School –

a grant towards a residential trip. Our grant will ensure disadvantaged pupils can join the school's week away to ensure that everyone can access the same experience and do things for the first time like riding a bike and paddling in the sea.



- ✓ Events
- ✓ Equipment and capital costs

Example: Action for Kids Charitable Trust –

a grant for mobility equipment AFK provides specialist mobility equipment not available on the NHS to disabled children and young people. The right piece of equipment can mean the difference between playing outside with friends or watching from the side lines; between participating in sport or spectating.



- ✓ Activity taking place in UK

We do not fund:

- ✗ Feasibility studies/consultations
- ✗ Crisis Funding
- ✗ Core Funding
- ✗ Retrospective Funding (i.e. spending that has already taken place)
- ✗ Items or Projects which statutory bodies have a duty to fund

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ELIGIBILITY: Organisations

We will consider applications from the following:

- ✓ Registered Charities or Charitable Incorporated Organisations
- ✓ Schools and Further Education Colleges (usually exempt charities)
- ✓ NHS Trusts

Organisations must have:

- ✓ At least one set of published accounts at the point of applying
- ✓ A bank account in the organisation's name with at least two unconnected signatories
- ✓ (for charities) At least 3 unconnected Trustees

We receive more applications than we can fund and give priority to organisations based in and/or working in the South West.

We do not fund:

- ✗ Individuals
- ✗ Social Enterprises including Community Interest Companies
- ✗ Private Companies
- ✗ Local Authorities



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Decision Making Process



- ✓ We can only accept our online application form.
- ✓ We aim to review applications in the month following online submission.
- ✓ Some smaller grant applications (£10,000 and under) may be approved by the Trustees after the first Trustees Review
- ✓ The requirement for Further Information will be tailored to each application, likely to include one or more the following:
 - Budget
 - Quotations
 - Policies
 - Plans
 - Site visits and face to face meeting
 - Request for a short video to supplement the application for a grant
- ✓ All offers of financial support will be subject to The Hargreaves Foundation's Terms & Conditions and satisfactory completion of Due Diligence.
- ✓ We will notify all unsuccessful applicants of the decision and offer feedback to all unsuccessful applications.

Grant recipients

If you are awarded a grant from The Hargreaves Foundation, we require you to complete and return a Grant Report Form at the end of your project or initiative. This will usually be required within 6 months of the grant award or, in the case of longer projects, a month after the end of your project. This report will ask you about the difference your project or item has made in the lives of the young people benefiting. We are happy for you to include case studies and photos with your grant report – as long as sharing these complies with GDPR/Safeguarding Policies. We also encourage grant recipients to tell us about how they used the grant and the difference it made in a 90 second short film.

How to apply

You can apply to The Hargreaves Foundation at any time using our online application form. Please note you cannot save the application form - we suggest saving elsewhere first and cutting and pasting the text into the form once you are ready to submit.

We aim to acknowledge all applications received within six weeks of receipt.

If you would like to discuss a potential application, then please contact us using the online contact form or by contacting

Alexandra Butler Alexandra.Butler@thehargreavesfoundation.org.

Please be aware that we are a small team and receive lots of enquiries so it may be a while before we can respond.



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