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**Registered Charity Number:** 213629  
**Last update:** 03/06/2015

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**Grant total**

£675,000 (2011/12)

**Financial year (2013/14)**

No. of applications successful 49

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**Areas of work**

Local welfare and disability charities, environment and conservation, Quaker charities and international development

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**Trustees**

Victoria Salmon; Rupert Cadbury; Katherine van Hagen Cadbury; Margaret Salmon; Sarah Stafford; Adrian Thomas; John Penny; Sophy Blandy; Janine Cobain.

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**Beneficial area**

West Midlands, especially Birmingham and, to a lesser extent, UK, Ireland and overseas.

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**Information available**

Accounts; annual report; Charity Commission record; funder's website.

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**General information**

This trust was established in 1923 for general charitable purposes. It describes its origins as follows:

“William was the second son of Richard Cadbury, who, with his younger brother George, started the manufacture of chocolate under the Cadbury name. He came from a family with strong Quaker traditions which influenced his whole life. It was this Quaker ethos which underpinned his commitment to the advancement of social welfare schemes in the city of Birmingham.”

“William Cadbury established the trust soon after his two years as lord mayor of Birmingham from 1919 to 1921, wishing to give more help to the causes in which he was interested. One such was the building of the Queen Elizabeth Hospital, a medical centre with the space and facilities to bring together the small specialised hospitals scattered throughout Birmingham [...] He did much to encourage the city library and art gallery and a wide circle of Midland artists who became his personal friends. Through this charity, he also secured several properties for the National Trust.”

“As time went on, members of his family were brought in as trustees and this practice has continued with representatives of the next three generations becoming trustees in their turn, so that all the present trustees are his direct descendants.”

The trust's [website](#) outlines a clear grantmaking policy:

- “The William Cadbury Charitable Trust (“the trust”) supports charitable organisations based in the UK. If you do not have a UK base, are not registered with the Charity Commission or are applying as an individual we will not be able to help”
- “please review the Grant Programmes page in order to establish whether your project qualifies for our support. The West Midlands grant programme is sub divided into sectors which may overlap. Please select the sector which best fits your project”
- “please ensure that your application is brief, concise and to the point. Trustees are required to undertake a large volume of reading prior to a meeting and if you have exceeded the equivalent of three sides of A4 you may be asked to re-submit a shortened application”
- “trustees will consider applications for core costs as well as for development / project funding”
- “if the trust has supported you in the past, please briefly describe the outcome of the most recent project to receive our support”
- “grant applications can be submitted on-line or, if preferred, by post”
- “applications are considered by trustees on a regular basis and small grants (up to a maximum of £2000) are awarded monthly”
- “trustees meet in May and November to award approximately twenty large grants at each meeting, ranging in value from £10,000 to £20,000 with an occasional maximum of £50,000”
- “grants are normally awarded on a one-off basis and repeat applications are not usually considered within two years of the award”
- “UK bodies legally exempt from registration with the Charity Commission can apply and small grants are occasionally made to unregistered groups in the West Midlands (who must nevertheless have a constitution, an elected committee and a bank account controlled by two or more committee members.)”
- “we normally respond to appeals within six weeks of submission. If at that stage your appeal has been shortlisted for a large grant you may be asked to provide additional information and, if you have not already done so, to complete our on-line application form. Trustees may also ask to visit certain shortlisted applicants.”
- “applicants selected from the shortlist for consideration at the next half yearly meeting will be notified in the month prior to the meeting.”
- “successful applicants are asked to provide a receipt so that we can meet the requirements of our auditors and it is very much appreciated if this can be done promptly.”
- “all applicants will receive a response from the trust whether or not their application has been successful.”

“Birmingham and the West Midlands”

- “*community action* - community based and organised schemes (which may be centered on a place of worship) aimed at solving local problems and improving the quality of life of community members”
- “*vulnerable groups* - vulnerable groups include the elderly, children and young people, the disabled, asylum seekers and similar minorities”
- “*advice, mediation and counselling* - applicants must be able to point to the rigorous selection, training and monitoring of front line staff (particularly in the absence of formal qualifications) as well as to the overall need for the service provided”
- “*education and training* - trustees are particularly interested in schemes that help people of working age develop new skills in order to re-enter the jobs market”
- “*environment and conservation* - projects which address the impact of climate change and projects to preserve buildings and installations of historic importance and local interest”
- “*medical and healthcare* - covers hospices, self help groups and some medical research which must be based in and be of potential benefit to the West Midlands”
- “*the arts* - music, drama and the visual arts, museums and art galleries.”

“United Kingdom”

- “*the religious society of friends* - support for groups with a clear Quaker connection and support for the work of the Religious Society of Friends in the UK”
- “*penal affairs* – restorative justice, prison based projects and work with ex offenders aimed at reducing

re-offending.”

“Ireland”

- “*peace and reconciliation*”

“International development”

- “*Africa - the international development programme is concentrated on West Africa and work to reduce poverty on a sustainable basis in both rural and urban communities - schemes that help children access education are also supported*”
- “*Asia and Eastern Europe*”
- “*South America.*”

Note: The international development programme is heavily oversubscribed and unsolicited applications are unlikely to be successful.

## Grantmaking

In 2011/12 the trust had assets of £25 million and an income of £902,000. Grants were made totalling £675,000. Grants were broken down as follows:

	Percentage
West Midlands	75%
International development	18%
United Kingdom	5%
Ireland	2%

Beneficiaries across all categories receiving £2,000 or more included: Concern Universal (£90,000); Youth Hostel Association - Wilderhope Manor (£50,000); Birmingham Royal Ballet Trust (£24,000 each); Ideal for All and The Patients Association (£15,000 each); Age Concern and Royal Birmingham Society of Artists (£10,000 each); Castle Gates Family Trust (£8,000); Britain Yealy Meeting (£5,000); and Birmingham Settlement (£3,000).

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## Exclusions

The trust does not fund:

- individuals (whether for research, expeditions, educational purposes or medical treatment)
- projects concerned with travel, adventure, sports or recreation
- organisations which do not have UK charity registration (except those legally exempt).

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## Applications

Applications can be submitted via the trust's online [application form](#). Alternatively, they can be made in writing to the correspondent, including the following information:

- charity registration number
- a description of the charity's aims and achievements
- the grant programme being applied to
- an outline and budget for the project for which funding is sought
- details of funds raised and the current shortfall
- if the organisation has received funding from the trust before, please provide brief details of the outcome of this project.

There is no requirement to send your charity's annual report and accounts as the trust will refer to the accounts held online by the Charity Commission. Applications are considered on a continuing basis throughout the year. Small grants are assessed each month. Large grants are awarded at the trustees' meetings held twice annually, normally in May and November. Applicants whose appeals are to be considered at one of the meetings will be notified in advance.