

## **PETERSFIELD u3a LEARNING GRANT SCHEME 2026 (PILOT)**

### **APPLICANT PACK**

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*“The Learning Grant scheme is designed to help groups try something new, develop their activities, or enhance members’ learning in creative ways” – Jenny Thwaites (Chair)*

#### **(1) Introduction**

Over the last several years, our u3a costs have been a little less than our revenue. As a result, we have accumulated ‘surplus funds’ that we are unlikely to use in the normal course of events.

As a charity, we follow Charity Commission guidance which discourages us from holding surplus funds. Rather, the Commission prefers the funds to be used towards the charity’s purpose, which for Petersfield u3a is:

*‘the advancement of education, and in particular the education of older people and those retired from full-time work, by all means including associated activities conducive to learning and personal development in Petersfield and surrounding district’.*

In order to use surplus funds in the pursuit of our charity’s purpose, your Management Committee has agreed to introduce a Learning Grant scheme, and will allocate up to £5,000 of our u3a’s surplus funds to this scheme in the current year. The Management Committee is keen to help as many members as possible, within this limit, and the sums awarded will reflect this. As this is a new venture the scheme will be initially run on a pilot basis so it can be reviewed.

The funds will enable groups to carry out projects that extend their normal activities in ways that will advance our members’ education, and are conducive to enhanced learning and personal development.

The scheme will run from September 2026 to the end of March 2027 and has been designed to be fair, transparent and compliant with Charity Commission guidance.

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The Management Committee will evaluate the pilot scheme following its completion, taking into account members’ views. This will help us identify what works well and what can be improved.

## (2) How to apply for a Learning Grant

### Who can apply?

Any group, or combination of groups working together, may apply for a Learning Grant in 2026. The application may be submitted by either the convenor or one or more other group members.

### What is eligible for a Learning Grant?

Anything that will advance our members' education and is conducive to enhanced learning and personal development could be considered. Illustrative examples of possible projects include:

- Workshops and hands-on sessions – e.g. art, craft, writing, birdwatching, research;
- Field trips or site visits – e.g. industry sites, museums, galleries, exhibitions;
- Hosting guest speakers or experts to provide specialist input;
- Individuals attending learning events in order to pass on learning content to other members;
- Equipment for use by one or more groups<sup>1</sup>;
- Venue hire for special learning events;
- Competitive activities<sup>2</sup> or creative projects which extend groups' learning;
- Activities occurring in conjunction with other local u3as;
- Other special group events designed to enhance learning.

### Is anything ineligible for a Learning Grant?

Our interest groups self-fund their normal activities' costs (e.g. venue hire, typically-used resources, refreshments). These costs are not eligible for a Learning Grant.

### If we receive a Learning Grant in 2026, when must we use it?

Projects are to be completed by **31 March 2027**. If there is a practical reason why this is not possible, please explain this when applying — an extension may be considered.

### When to apply for a Learning Grant?

You can apply for a Learning Grant up to the closing date of **Friday 17 July 2026**. No late applications can be considered.

### How do we apply for a Learning Grant?

1. Simply tell us about your group's proposed project. Please do this by using the 2026 Learning Grant application form – you can either complete the form and attach it to an email, or simply answer all the questions in an email. You'll find the form at the end of this Applicant Pack. It is also available as a stand-alone form from the Grants Team ([grants@petersfieldu3a.org.uk](mailto:grants@petersfieldu3a.org.uk)) or from your Hub Coordinator
2. Email your application to the Learning Grants team at [grants@petersfieldu3a.org.uk](mailto:grants@petersfieldu3a.org.uk) .  
We'll acknowledge receipt of your application within seven days.

### If we have question about the scheme?

Simply send your question to [grants@petersfieldu3a.org.uk](mailto:grants@petersfieldu3a.org.uk). We will answer any question received by **30 June**, and will aim to respond within 7 days.

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<sup>1</sup> Any purchased equipment remains the property of Petersfield u3a.

<sup>2</sup> Excludes activities such as raffles, also monetary prizes.

## (3) What happens after you apply for a Learning Grant?

### Who will review your application?

The Evaluation Team will be made up of two trustees<sup>3</sup> and two other u3a members. The team will assess all applications and, in each case, decide whether to award a Learning Grant.

### What will the team look for?

The Management Committee is keen to support as many members as possible within the overall funding available, but will only award funding for projects that are clearly well matched with our charity's purpose (see page 1).

The Evaluation Team will therefore consider each application on its own merits:

- Is the application clear and does it give enough detail to understand the proposal?
- How does the application **advance members' education**, how is it conducive to **enriched learning or learning experiences** as well as **personal development**, and how does it **move beyond normal meeting activities**?
- How many members will benefit?
- Does it offer good **value for money**?
- Is the project straightforward to manage and administer?
- Are there any challenges, and are they manageable?

If there are insufficient funds to support all strong applications, the Team may need to prioritise those which most closely align with our charity's purpose, benefit more members and offer better value for money.

Decisions will be at the sole discretion of the Evaluation Team, and, where appropriate, the Management Committee.

### What are the potential outcomes?

The Evaluation Team may:

- offer a Learning Grant for the full amount requested or a partial amount;
- set conditions (e.g. providing updates on progress).

The Evaluation Team can award grants to a **maximum** of £500 directly through the Treasurer. Larger sums are only awarded at the discretion of the Management Committee.

The Team will aim to provide useful feedback to unsuccessful applicants.

### When and how will we hear the outcome?

The Evaluation Team expects to evaluate proposals by the end of August 2026 and aims to provide feedback by email from early September 2026.

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<sup>3</sup> All Management Committee members are trustees registered with the Charity Commission.

## (4) Using your Learning Grant

The Management Committee wants to give you maximum freedom in your use of the Learning Grant but... We want to make the 'but' as small as possible; however, as charity trustees, we want to follow good practice. This guideline describes practice we would like you to observe.

### **Complete your project**

Complete your project by **31 March 2027** (or later if agreed with the Evaluation Team).

### **Conditions**

Please take note, and act on, any conditions set when your Learning Grant was awarded.

### **Financial matters**

**Please note that the Learning Grants Team will be working closely with the Treasurer regarding matters of funding.**

- We will let you know how to manage and record your use of Learning Grant funds.
- Use funds only as described in your application.
- If, for any reason, a need arises to change how Learning Grant Funds are used, ensure the Learning Grants Team is fully aware, agree and approve before any change of use occurs. We may have to refer to the Management Committee before approving changes, so allow time for this.
- Your Learning Grant may have been agreed provisionally on the basis of estimated costs. If so, you will be given a deadline for submitting the confirmed costs. Please ensure you do so by that date, and remember to allow time in your planning for the final costs to be reviewed and approved. This may require approval by the Management Committee.

### **Equipment**

If your Learning Grant includes the purchase of equipment, we will let you know how to add this to our Asset Register so that it's covered by u3a insurance. Please also ensure all equipment is properly stored.

### **Grant benefits**

When your project is complete, please provide a short report outlining how you used your grant and how members benefited. We may ask you to provide a short article for 'Connect' to let the wider membership know what your grant achieved – we want members to be able to see how surplus funds have been used and what benefits have been achieved.

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## LEARNING GRANT SCHEME 2026

### APPLICATION FORM

#### Instructions:

You can copy this form into a fresh Word document. Alternatively, a stand-alone version of this form is available from the Grants Team ([grants@petersfieldu3a.org.uk](mailto:grants@petersfieldu3a.org.uk)) or from your Hub Coordinator.

Complete your application form<sup>4</sup> and email it to [grants@petersfieldu3a.org.uk](mailto:grants@petersfieldu3a.org.uk) by **17 July 2026**.

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#### 1. Name of your group

#### 2. Title of your project

*A brief title to identify your project*

#### 3. Your Proposal

*Referring to section 2 of the Applicant Pack, (What is the team going to be looking for?), please describe your proposed project in the sections below. Use as much space as you need and don't worry about being overly formal – just tell us what you have in mind.*

##### a. What do you want to do with the Learning Grant?

*Please tell us what you plan to do and why you want to do it.*

##### b. How will your project support learning in our u3a, and who will benefit?

*Please explain how your project will enhance members' learning or personal development, how many group members will be involved and whether the benefits will extend beyond your group.*

##### c. Timing:

*When do you expect your project to start and end? Projects must be completed by **31 March 2027**<sup>5</sup>. Funding will be available from September 2026.*

#### 4. How much do you need<sup>6</sup>?

*List the items and services with costs as well as the total amount. Where possible, obtain a quotation before submitting this form. If any figures are estimated, mark them clearly as 'Estimate'.*

#### 5. Your contact details<sup>7</sup>:

*Please provide details of your main contact and a second (back-up) contact (name, email, phone).*

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<sup>4</sup> If you wish, instead of using the form, you can simply respond to all the questions in an email.

<sup>5</sup> If there is a practical reason why this is not possible, please explain when applying — the Evaluation Team may consider an extension.

<sup>6</sup> You may apply for full- or part-funding. All costs must include VAT.

<sup>7</sup> Applicant may be group convenor or any other member/s of the group.