



## BRAZIER TRUST GRANTS POLICY

### 0. Revision History

<b>Version</b>	<b>Issued</b>	<b>Notes</b>
Draft 1.0	2 September 2013	Initial draft for review
Version 1.0	2 September 2013	Adopted
Version 1.1	28 April 2014	Amendment Approved (28 April 2014)
Version 1.2	15 December 2014	Amended so that the threshold below which grants may be considered at a meeting of the Town Council is '£2000 or less' (was 'less than £2000')
Version 1.3	14 December 2020	Addition of New Policies

### 1. Introduction

The objects of the Brazier Trust are defined in the Order made by the Charity Commission on 2 February 1987. Section 3 sets out the powers for the application of income as follows:

- (1) The Trustee shall apply the clear income of the charity in the maintenance and upkeep of the property of the charity
- (2) Subject thereto, the trustee shall apply said income as it sees fit for charitable purposes the general benefit of the inhabitants of Bishop's Stortford.

The Charities Act 2011 defines a charitable purpose as one that falls within the following list of purposes and is for the public benefit.

- The prevention or relief of poverty
- The advancement of education
- The advancement of religion
- The advancement of health or the saving of lives
- The advancement of citizenship or community development
- The advancement of the arts, culture, heritage or science
- The advancement of amateur sport
- The advancement of human rights, conflict resolution or reconciliation or the promotion of religious or racial harmony or equality and diversity
- The advancement of environmental protection or improvement
- The relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage
- The advancement of animal welfare
- The promotion of the efficiency of the armed forces of the Crown, or of the efficiency of the police, fire and rescue services or ambulance services
- Any other purposes currently recognised as charitable and any new charitable purposes which are similar to another charitable purpose

The Trustee therefore has a quite wide discretion in applying the income surplus to that required to maintain the property.<sup>1</sup>

## **2. Policy Statement**

Grants will be awarded to support and encourage a diverse range of community activities across all age ranges, a wide range of interests, initiatives and events that help to meet the needs of the residents of Bishop's Stortford.

## **3. Guidelines and Criteria**

Grants will normally be given only to:

- Voluntary, charitable or not-for profit organisations based in or serving the area of the civil parish of Bishop's Stortford
- Individuals resident in or around Bishop's Stortford where the grant is for charitable purposes and for the benefit of the residents of the civil parish of Bishop's Stortford.

Grants will not be awarded to National Charities unless it can be demonstrated that the local branch will benefit directly. Written evidence must be provided.

Grants may be made:

- for capital purchases, in which case no more than one application may be made per project
- for one-off projects (which may include a combination of revenue and capital items), in which case no more than one application may be made per project
- for revenue support, in which case no more than one successful application may be made by any organisation (or group of related organisations) in any three year period.

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<sup>1</sup> Grants MUST by law fall within one of these categories. The Trust could, in the policy, restrict grants to a subset of these categories if it so chooses.

The Trustee will not give grants for recurring revenue support.

The purpose for which the grant is applied must be charitable in law.

All applicants must submit:

- an application on the prescribed grant application form
- evidence that the project or endeavour for which a grant is sought is financially viable
- evidence that there is a real financial need for the grant
- list grants received from any organisation during the previous 36 months

Organisational applicants must submit, in addition, accounts for the most recent financial year which should show that the accounts are well managed and the organisation as a whole is financially viable.

Applications for grants with a value of £2000 or less will be considered by the Trustee (Bishop's Stortford Town Council) at ordinary meetings of Council or at a meeting of the Trust. Applications for grants in excess of £2000 will be considered at a meeting of the Trust. The Trust cannot guarantee a grant to any organisation or individual. Each grant application is considered on its individual merits.

Grant money awarded must be spent on the purpose for which the application was made. Requests to re-assign grants to an alternative purpose will be considered only in very exceptional circumstances. Unless such a request is granted money which is not spent on the declared purpose must be returned to the Trust.

The Trust will normally expect to distribute grants to a variety of organisations, this may mean a smaller amount is awarded than that applied for. The Trust reserves the right to decline any application or to apply conditions to the grant.

Whilst the Trust does not require that applicants have match funding from other sources for their project, it must be stated on the application if other funding is being sourced. Applications where more than 50% of the funding for the project will be considered less favourably. The Trust will consider applications from religious groups, but the application must show that the project will bring wider community benefit.

Applications which do not conform to the above requirements will be returned without consideration. Applicants will be disqualified if they submit non-conforming applications on more than one occasion.' ('the above requirements' referred to in this recommendation is the documentation which applicants for grants must submit).

The Trust will require all organisations to provide a formal acknowledgement of receiving grant aid. In the case of individuals, the Trust will require a report of the project or other agreed method of verifying the use for which application of grant was made.

When a grant is awarded, the Trust also reserves the right to reclaim part or the entire grant if it is not satisfied that it has been spent in accordance with the application and/or conditions applied by the Trust. It will only take this action after giving the organisation or individual any opportunity to make representations.

The recipient organisation must provide feedback following completion of the project, or within 12 months of award of grant, whichever is sooner.

Effective 1st April 2021, Town Council funds available for ad-hoc grants be donated each year to the Brazier Trust for charitable purposes for the general benefit of the inhabitants of Bishop's Stortford (i.e. in accordance with the powers of the Trust).