HALSTOCK VILLAGE TRUST

Registered Charity No. 1031807

Grant-Making Policy

Information for applicants

1. What does the Trust fund?

Halstock Village Trust provides grants for **charitable purposes that benefit people who live in Halstock**.

The Trustees consider applications individually and have to make sure that any grant:

- is for a charitable purpose recognised in law; and
- benefits people who live in Halstock, either directly or indirectly.

The Trust has limited funds, so grants are intended to support needs and projects where the Trust can make a meaningful difference.

2. Who can apply?

Applications may be considered from:

- **Community groups, associations and charities** working in Halstock or for the benefit of Halstock residents.
- **The Parochial Church Council and other religious organisations**, where their activities provide a clear benefit to Halstock residents.
- **Halstock Parish Council and other public bodies**, where the proposed expenditure is something they are not otherwise required or expected to fund.
- **Individuals living in Halstock**, in exceptional circumstances where there is a clear charitable need and no other suitable source of funding is available.

If you are unsure whether you are eligible, please contact the Trust before making an application.

3. The Trust is normally a funder of last resort

The Trust is **not normally the first organisation you should approach for funding**.

Before applying to the Trust, you should consider whether funding is available from other organisations that are better placed to support your project or need.

Depending on the circumstances, this might include:

- specialist grant-making trusts;
- national or local funding schemes;
- heritage or church funding;
- government or statutory funding;
- insurance;
- parent, umbrella or governing organisations; or
- other sources of sector-specific funding.

We may ask you to show what other funding you have applied for or investigated. You do **not necessarily have to have received a refusal from every other funder**, but the Trustees will expect you to have properly explored the most appropriate alternatives.

4. What will the Trust not normally fund?

The Trust will not normally make grants for:

- political activities;
- activities that take place outside Halstock, unless they clearly benefit Halstock residents;
- costs that should properly be paid for from public or statutory funding;
- expenditure that has already been incurred before you apply, except in exceptional circumstances; or
- anything that is inconsistent with the Trust's charitable purposes.

5. What will the Trustees consider?

When considering an application, the Trustees will look at:

Benefit to Halstock

How will the grant benefit people who live in Halstock?

Charitable purpose

Is the proposed expenditure for a genuine charitable purpose?

Need for the funding

Why is the funding needed, and why is the Trust an appropriate source of support?

Other funding

Have you explored other suitable sources of funding?

Value for money

Is the amount requested reasonable in relation to the proposed project or need?

Ability to deliver

If the application is for a project, does the organisation have suitable arrangements in place to deliver it successfully?

6. Larger grant applications

If you are applying for a **large grant**, the Trustees may ask for additional information. A large grant is currently defined as an application which, alone or together with other grants to the same applicant or project during the same financial year, would exceed:

- **£5,000**, or
- **10% of the Trust's available reserves**,

whichever is lower.

These figures are subject to final approval by the Trustees.

For a large project, you will normally need to provide:

- a description of the project and what you want to achieve;
- an explanation of how the project will benefit Halstock residents;
- the total cost of the project, with a breakdown of the main costs;
- details of the funding you have already secured;
- details of other funding you have applied for or are planning to apply for;
- details of any funding applications that have been unsuccessful or are still awaiting a decision;
- evidence that you have approached relevant specialist funders, where appropriate;
- details of your organisation's own financial contribution and fundraising;
- details of any relevant insurance claim or other financial support;
- the remaining amount you need to raise and the amount you are asking the Trust to contribute;

- your most recent audited or independently examined accounts, where applicable; and
- details of your organisation's constitution, charitable status and governance arrangements.

7. Specialist funding
For some projects, the Trustees will expect applicants to investigate specialist sources of funding first.
For example, a church, heritage or historic-building project may need to explore appropriate heritage, church or denominational funding schemes before applying to the Trust.
The Trust may ask you to provide evidence of the applications you have made.

8. How much can the Trust award?
The Trust has limited reserves and must make sure that it can continue to support charitable needs in Halstock in the future.
The Trustees therefore consider the size of every grant in relation to:
- the total cost of the project or need;
- other funding available;
- the Trust's available reserves; and
- other likely demands on the Trust's funds.

The Trust may therefore decide to:
- award the amount requested;
- award a smaller amount;
- make an award subject to conditions;
- wait for further information or the outcome of other funding applications; or
- decline the application.

There is a limit on the amount that can normally be awarded to one applicant or project in a financial year. Larger awards require additional Trustee approval.

9. If your application is successful
The Trustees may attach conditions to a grant.
For example, the Trust may:
- pay the grant in stages as a project progresses;
- require you to provide an update or report on how the money was spent;
- require acknowledgement of the Trust's contribution; or
- require some or all of the grant to be repaid if the money is not used for the purpose for which it was awarded.

If your project is waiting for an insurance payment or another funding decision, the Trustees may make a conditional or provisional commitment. The final amount paid by the Trust may depend on the amount still needed once the other funding has been confirmed.

10. If your application is unsuccessful
The Trustees' decision is final and there is **no formal right of appeal**.
However, you may apply again if:
- you are applying for a different project or purpose; or

- there has been a significant change in your circumstances or funding position.

11. Confidentiality
The Trustees will treat application information as confidential, except where disclosure is required by law or is appropriate for the Trust's charitable purposes. The Trust will report grants in its Annual Report and Accounts where required by the Charity Commission.

12. Important information for applicants
Before applying, please make sure you can clearly explain:

1. **What do you need funding for?**
2. **How much does it cost?**
3. **How much are you asking the Trust for?**
4. **Who in Halstock will benefit?**
5. **Why is this a charitable purpose?**
6. **What other funding have you considered or applied for?**
7. **What contribution are you making yourself?**
8. **What will happen if you do not receive the Trust's funding?**

Clear and complete information will help the Trustees assess your application.

In summary

The Trust is most likely to consider an application where:

- the applicant is eligible;
- there is a clear charitable purpose;
- people living in Halstock will benefit;
- other appropriate sources of funding have been explored;
- the amount requested is reasonable; and
- there is a clear explanation of how the money will be used.

If you are unsure whether your project or circumstances are suitable, please contact Halstock Village Trust before completing an application.
