

# DEWSBURY ENDOWED SCHOOLS FOUNDATION TRUST GRANTS POLICY

## INTRODUCTION

The Trust was established to benefit the promotion of education, including social and physical training, of persons between the ages of seven and twenty-five years who are resident in the area of the former County Borough of Dewsbury.

The Charity has investment funds which it uses to support applications made on behalf of individuals and groups that demonstrate that they are eligible under the relevant criteria.

The Trust is administered by Kirklees Council which acts as Corporate Trustee and makes all decisions on awards made by the Trust.

The Corporate Trustee is advised by a working party made up of individuals from the Dewsbury area.

This is distinct and separate from the role of Kirklees Council as a local authority.

## SCHEME

Any application for a grant must satisfy the following criteria before consideration will be given by the Corporate Trustee as to whether or not to award a grant, be that the whole or a part of the sum applied for.

### Applicability

To be successful, each grant application

- Must support education or social or physical training
- Must be for individuals who are resident within the former County Borough of Dewsbury or if away on studies has a parent(s) that is
- Must be aged between 7 and 25 years
- For corporate organisations, must evidence that a minimum of 66% of participants are resident within the former County Borough of Dewsbury and be aged between 7 and 25 although this figure can be discretionary at the sole decision of the Corporate Trustee.

Organisations trading for profit are not eligible.

Public bodies are not eligible for support. (other than schools, colleges or not for profit childcare providers).

### Value of award

The grant can be awarded subject to the following

- (a) individuals usually: under £500

- (b) voluntary and community organisations (unlimited but will only exceed £25,000 on a very exceptional basis)
- (c) schools or childcare facilities, but only where more than two thirds of the attendees are resident in the current area of benefit although this figure can be discretionary at the sole decision of the Corporate Trustee (unlimited but will only exceed £25,000 on a very exceptional basis).

The Corporate Trustee will consider the subsidy value per eligible user as a criterion to determine the level of support to be provided.

For individuals, the Corporate Trustee does not seek to routinely pay for annual membership fees, attendance fees, exam fees, or similar, although it will give consideration to these in circumstances of specific hardship.

For corporate organisations:

It is envisaged that the arrangements will provide for a grant of a fixed sum for the purposes described in the application which will pay for.

- (a) specific items of goods, services or equipment; or
- (b) agreed works (including consultancy fees); or
- (c) make an agreed fixed, capped and/or proportion of support to the same; or
- (d) provide support by way of occasional subsidy

To the benefit of principally all participants who meet the age and residency applicability criteria.

In addition:

- All activity must be open to all inhabitants (within the relevant age/ residency criteria) should they choose or wish to participate.
- There must be no discrimination on the grounds of any protected characteristics (other than where this is permissible by law)
- There must be an adequate safeguarding policy
- The support may be denied or reduced if there is a shared benefit to a larger number of members who do not meet the eligibility criteria
- A group where eligible membership is significantly higher than half (66% and above) is more likely to receive the full or a significant part of their sum applied for
- The availability of other funding sources will be used as part of any decision on award
- Where an application is for an award to support a proposed commercial activity, acquire or improve premises, or to acquire vehicles, the business plan submitted must demonstrate that after support, the activity is sustainable and will not require further support, including asset renewal
- Where you are seeking grant funding for acquiring or improving a property, you must be able to demonstrate that you have a lease valid for at least 10 years and its use will satisfy the eligibility criteria
- There will be no support that contributes to the ongoing costs of an existing institution or operation, including routine repairs
- There will be no support where an organisation has adequate funding already available to them to meet the costs of the project

- Applicants will be required to demonstrate the funds that they have generated, anticipate generating and what funds have been secured from other parties. The grant assistance will not duplicate any of these sources.
- Grants will be exclusive of VAT when the applicant is able to obtain recovery from HMRC.

### Repeat Applications

Individuals will usually only be able to apply for 2 awards within any 5-year period. Organisations may apply for an unlimited number of awards for different purposes, though application should not relate to seeking additional funds to complete or sustain an earlier approved project.

### Payment of the Grant, and Project Monitoring

Payment to individuals will be on approval of the application. Payment to organisations will usually be on demonstration that the project has been completed, though in some cases, where this can be justified, some funding may be released in advance, or by agreed stage payments.

Individuals must complete a simple return after about 6 months confirming that they have fulfilled the purpose for which the grant aid was awarded.

All organisations awarded grants are required to provide

- a. A full statement of costs incurred, and income generated, as applicable
- b. Invoices that relate to any cost element exceeding £500
- c. Details of completion of the project and an assessment of the achievement of the stated objectives.

Sometimes this may be before release of the final funds.

If in the opinion of the Corporate Trustee the applicant has not used the funds as indicated, appropriately, against the stated objectives, the Corporate Trustee may withhold grant or seek to recover grant already paid.

There will be regular monitoring to the Corporate Trustee. For this purpose, some applicant information will be requested on a voluntary basis. This will not be used to determine grant award, and names of applicants, or any information that might reveal the name of applicant, will not be included in any public material.

## **AUTHORISATION**

Any application made on behalf of

- another person will need the consent of that person and for those under 18, their parent or legal guardian.
- A corporate body requires the governance consent of that organisation.

All applications will be assessed by officers on behalf of the Trust and, subject to the compliance with these scheme rules, will be presented to the Working Party,

with a recommendation. The Working Party will make recommendations to the Corporate Trustee.

The Corporate Trustee will formally consider each application.

The Corporate Trustee will consider the merits of each application and will consider first the absolute merit of each application, (to determine if a proposal is worthy of support), and then the priority of each application, recognising that the funds available for support each year are limited. The Corporate Trustee will consider the costs and merits of any project in determining what, if any, support to offer.

#### **OFFICERS ROLE**

Officers will arrange administration of the scheme, including production of reports assessing each application, and the monitoring and making of payments approved by the Corporate Trustee and ensuring funds have been expended in respect of the purpose of the application.

#### **DATA PROTECTION**

All applicants should be aware that all applications, whether successful or not, will be retained for 6 years. The Corporate Trustee will not share any information that could identify an individual applicant but may share information that relates to any corporate applicant.

#### **APPLICATIONS**

Can be made at any time via the entry web page.

Applications are considered approximately 4 times per year and where an award is agreed to be made all efforts are put in to try and ensure early payment.

