

Grant Making Guidelines for the Richard Waynforth Trust

(part of Charity Registration No: 1134526)

1. What are the Aims of Richard Waynforth Trust?

The Richard Waynforth Trust (1134526-3) uses income from its ethically managed endowment fund to award grants that can alleviate hardship, distress and need being experienced by members and attenders of Ipswich & Diss Area Quaker Meeting. A new scheme was adopted by the Charity Commission on 7 October 2014 in which the area of benefit now also covers members and attenders of South-East Anglia Area Meeting and Norfolk & Waveney Area Meeting.

2. What Types of Grants are Available?

There are two types of grants available from the Richard Waynforth Trust:

2.1 General Grants

General grants can be used to alleviate hardship, distress and need by paying for:

- household bills (e.g., food, essential clothing, rent/mortgage payments, utilities)
- transport to and from Meeting for Worship
- essential home refurbishment (e.g., doors/floors/windows, heating, disabled facilities, kitchens)
- household items and electrical appliances
- mobility and disability aids (e.g., electrically powered vehicles, stair lifts, hearing aids, spectacles)
- training to get back to work (e.g., course fees, travel expenses, examination fees)
- emergency travel
- respite care and home help
- computer equipment (e.g., PCs, laptops, tablets, printers, keyboards, mice) and software used to perform Quaker roles within an Area Meeting or Local Meeting

2.2. Grants for Britain Yearly Meeting, Junior Yearly Meeting and Yearly Meeting Gathering

The Trust believes that no member or attender should be constrained by financial reasons from attending Britain Yearly Meeting (BYM), Junior Yearly Meeting (JYM) and Yearly Meeting Gathering (YMG). The Trust therefore provides the Area Meetings with the sum of £2,000 per annum to help finance attendance at these events for those who would otherwise find it financially difficult to attend. Should any Area Meeting not need assistance of this kind, if for instance a bursary fund already exists for this purpose, this sum will not be allocated.

3. What Expenditures are not covered by Grants?

Please note that the Trust does not award any grants for:

- retrospective funding for money that has already been spent or for goods or services that have already been ordered or purchased
- medical treatment covered by the National Health Service
- attendance at training courses or events at Woodbrooke, Charney Manor and Swathmoor House
- expenses incurred in performing Quaker roles, such as the costs of training, traveling, computer consumables (e.g., print cartridges, paper) and administration (e.g., postage, telephone calls); these costs are paid for by either the Area Meeting or Local Meeting, depending on the role.

4. How does a Member or Attender Apply for a Grant?

In order to be considered for a grant, a member or attender is asked to submit a brief application form to show sufficient evidence of need and to explain how he or she will benefit from a grant (please see pages 4 and 5 for the general grants application and pages 6 and 7 for the BYM, JYM and YMG grants application). Application forms can be obtained from the Clerk of the relevant Area Meeting's Trustees or from the Elders, Overseers and/or Pastoral Care Groups of the Local Meetings. The application has to be countersigned by either the Clerk or an Elder of the applicant's Local Meeting.

The Trust encourages the Elders, Overseers and/or Pastoral Care Groups as well as members and attenders themselves to call the Clerk of their Area Meeting's Trustees to discuss potential needs. Completed applications for general grants should only be posted or emailed to the Clerk of Ipswich & Diss Area Meeting Trustees. Applications for BYM, JYM and YMG grants should be posted or emailed to the Clerk of the relevant Area Meeting's Trustees. Applications are accepted at any time.

5. How is a Grant Application Processed?

When an application is received for a general grant, the Clerk of the Ipswich & Diss Area Meeting Trustees enters the relevant information onto the Trust's grant database (please see page 8). The Clerk of the relevant Area Meeting's Trustees follows the same process when applications are received for BYM, JYM and YMG grants.

The Clerk next sends an acknowledgement letter or email to the member or attender to verify receipt of the application and to confirm when the applicant will be notified of the grant decision. The Clerk then forwards copies of the application to Trustees on the relevant Grants Panel (please see section 6). For each grant request, the Clerk also creates and maintains a file that includes the application form and all written correspondence.

6. How is a Grant Application Assessed and a Decision Reached?

For general grants, five Trustees from Ipswich & Diss Area Quaker Meeting and one each from Norfolk & Waveney Area Meeting and South-East Anglia Area Meeting form a Grants Panel that assesses and decides the outcome of applications. One of the seven grant panellists is always the Clerk to the Trustees of Ipswich & Diss Area Meeting. A quorum of four Trustees is needed to assess and decide the outcome of a grant application. The Grants Panel Trustees can meet to review an application or correspond by email and telephone.

For BYM, JYM and YMG grants, the relevant Area Meeting operates a similar grants panel, but comprised of its Clerk to the Trustees and its trustees only.

If a Grants Panel needs further information before deciding on the outcome of an application, the Clerk will contact the grant applicant directly or consult with the applicant's Elders, Overseers and/or Pastoral Care Group. The Clerk will then pass the additional information to the other Grant Panellists.

There are three decisions that the Grants Panels can reach for a grant:

- **Awarded** — The application is approved, and the funding is awarded in full or in part.
- **Conditional** — The grant is conditional on the fulfilment of a requirement(s) set by the Grants Panel. Once the member or attender has met the requirement(s), the grant will be funded. If the member or attender does not agree to the condition(s), the Trustees can reconsider the condition(s) or choose to reject the grant request.
- **Rejected** — An application will be rejected, if the Grants Panel does not agree that the request meets the objectives of the Trust, or there is insufficient evidence of need.

The Clerk notifies the member or attender of the Grants Panel's decision by letter or email. When a grant has been awarded, the relevant Area Meeting's treasurer pays the funds to the grant recipient via electronic bank transfer. When an application has been rejected, the Grants Panel will try to suggest alternative funding sources. A member or attender who wishes to contest a rejection by the Grants Panel is asked to write to the Clerk of Ipswich & Diss Area Meeting Trustees, who will bring the appeal to the full body of Trustees of Ipswich & Diss Area Meeting. If the member or attender is still unsatisfied, they should write to the Clerk of Ipswich & Diss Area Meeting, who is not a trustee. Of course, a member or attender may also withdraw an application, if the funding has been found elsewhere or is no longer needed.

The Clerk updates the grant database to record the status of the application (A=awarded; C=awarded conditionally; R=rejected with reason noted and W=withdrawn by applicant) and the amount awarded.

7. How are Grant Awards Monitored?

For general grants, the Clerk of Ipswich & Diss Area Meeting Trustees monitors the use and effectiveness of grants by directly contacting the grant recipients to confirm their grant has been of benefit. For BYM, JYM and YMG grants, the Clerk of the relevant Area Meeting's Trustees contacts the grant recipient.

The Trust also depends on the Elders, Overseers and/or Pastoral Care Groups of the Local Meetings to monitor any further needs of members and attenders who have received grants and to identify any other members and attenders who may benefit from relief-in-need grant funding.

Grant recipients are asked to notify the treasurer of Ipswich & Diss Area Meeting when general grant money has been spent. They are asked to notify their Area Meeting's treasurer when BYM, JYM and YMG grant money has been spent.

For general grants, if £500.00 or more was awarded, the grant recipient must provide receipts to the treasurer of Ipswich & Diss Area Meeting. For BYM, JYM and YMG grants, the grant recipient must always provide receipts to their Area Meeting's treasurer. Funding must be returned, if the grant recipient is unable to use the grant for its original purpose. Any unspent funding must also be returned.

8. How are Grant Awards Reported?

All grants awarded by the Trust are completely confidential and therefore are not publicised. The Trust's Annual Review provides a monetary value for the total amount of grants awarded during the financial year but does not mention the names of grant recipients or the details or values of any individual grants awarded.

At the end of each financial year (January to December), the AM treasurers provide their BYM, JYM and YMG grant database report (please see page 8), with receipts and applications, to the treasurer of Ipswich & Diss Area Meeting. If an Area Meeting does not use all of its £2,000 in a given year, then any unspent funds can be retained but will be subtracted from the next year's allocation.

Grant Application Form for the Richard Waynforth Trust

(part of Charity Registration No: 1134526)

Please use this application form for **general grants**. If you have questions or need help to complete this application, please call Christina van Melzen on 01986 798308 or email her at chrisvanmelzen@outlook.com.

1. About you

Name:	
Telephone Number:	
Email:	
Address:	
Post Code:	
AM and LM:	

2. About the grant

How much money are you asking for (please state an exact amount)?

Please specify the total cost and provide a full breakdown of the costs¹:

	£
	£
	£
Total	£

What do you want the money for and how will it help you?

Please explain why you qualify for a relief-in-need grant.

3. Bank Details

Please identify the bank account into which the funds should be paid, if your application is successful²:

Account Name:

Bank Name:

Sort Code:						
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Account Number:									
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4. Signatures

Please sign below and then ask either the Clerk or an Elder of your Local Meeting to countersign the application.

Applicant Signature:		Date:	
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Clerk/Elder Name:		Date:	
Signature:		LM:	

Completed applications should be posted or emailed to Christina van Melzen at Rookery Farm, Laxfield, Woodbridge, IP13 8JA or chrisvanmelzen@outlook.com.

Notes:

1. The mileage rate for car travel is 45p per mile.
2. A grant recipient is asked to notify the treasurer of Ipswich & Diss Area Meeting when the grant money has been spent. If the grant was for £500 or more, the grant recipient is also asked to provide receipts. Funding must be returned, if the grant recipient is unable to use the grant for its original purpose. Any unspent funding must also be returned.

Grant Application Form for the Richard Waynforth Trust

(part of Charity Registration No: 1134526)

Please use this application form for **BYM, JYM and YMG grants**. If you have questions or need help to complete this application, please call _____ on _____ or email _____.

1. About you

Name:	
Telephone Number:	
Email:	
Address:	
Post Code:	
AM and LM:	

2. About the grant

Do you wish to attend (please tick relevant box)?

Britain Yearly Meeting	
Junior Yearly Meeting	
Yearly Meeting Gathering	

How much money are you asking for (please state an exact amount)?

£	
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Please specify the total cost and provide a full breakdown of the costs¹:

Accommodation	£
Travel	£
Event Fee	£
Total	£

Please explain why you qualify for a relief-in-need grant.

3. Bank Details

Please identify the bank account into which the funds should be paid, if your application is successful²:

Account Name:

Bank Name:

Sort Code:						
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Account Number:								
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4. Signatures

Please sign below and then ask either the Clerk or an Elder of your Local Meeting to countersign the application.

Applicant Signature:		Date:	
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Clerk/Elder Name:		Date:	
Signature:		LM:	

Completed applications should be posted or emailed to _____ at _____ or _____.

Notes:

1. The mileage rate for car travel is 45p per mile.
2. A grant recipient is asked to notify his or her AM treasurer when the grant money has been spent. The grant recipient is also asked to provide receipts for the expenditure(s). Funding must be returned, if the grant recipient is unable to use the grant for its original purpose. Any unspent funding must also be returned.

