

## **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. It is a grant-giving trust and does not make loans.

### **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, children's toys, school books, or uniforms)
- 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)
- respite care or personal care for 4 weeks in any one year
- personal computing equipment and software including smart phones, broadband connection for one year to enable access to essential modern communication methods
- transport where appropriate, or occasional travel to Meetings for Worship for up to 24 occasions each calendar year
- emergency travel
- attendance at Quaker training courses or events, not covered by AM or LM funds

#### **2.2. Grants for Britain Yearly Meeting, Junior Yearly Meeting and Yearly Meeting Gathering, Young Friends' General Meeting or European and Middle East Section (FWCC) gatherings**

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), YFGM or FWCC-EMES gatherings. Applications should be made using the form specifically for such applications and not that for general grants.

### **3. What Expenditures are not covered by Grants?**

Any applicant to the RWT must be in membership, or a regular attender at a Meeting within our area of benefit. No applications can be made by a prisoner still in prison or in any way under the supervision of the prison service e.g. on parole.

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 Hall
- expenses incurred in performing Quaker roles, such as the costs of training, travelling, 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
- grants in contravention of terms of release on license of prisoners.

#### **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 evidence of need and to explain how he or she will benefit from a grant. Application forms can be obtained from the [suffolkquakers.org](http://suffolkquakers.org) website, Clerks to Area Meeting Trustees or from the Elders, Overseers and/or Pastoral Care Groups of the Local Meetings. The application needs to be countersigned by a member of the pastoral team of the applicant's Local Meeting. Application forms can be posted or emailed to the Clerk to the Trustees of Ipswich & Diss Area Meeting. Applications are accepted at any time.

#### **5. How is a Grant Application Processed?**

When an application is received the Clerk to Ipswich & Diss Area Meeting Trustees enters the relevant information onto the Trust's grant database. 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 Grants Panel. 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?**

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 communicate by email or telephone.

If the 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 Area Meeting treasurer pays the funds to the grant recipient via electronic bank transfer if possible. 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?**

The Clerk of Ipswich & Diss Area Meeting Trustees monitors the use and effectiveness of grants by contacting the grant recipients to confirm their grant has been of benefit.

The Trust also depends on 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 the grant money has been spent.

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 the 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 and only those people mentioned above (plus the accountant and account examiner) will know the name of the recipient. Grants 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.

ANNEX

**Revision of Richard Waynforth Trust Guidelines** (from IDAM Trustees Minute 47/20)

- a) *The applicant is in financial hardship in that they are at **an immediate risk of needing to borrow to pay their regular bills within the following three months***
- b) *The grant sum applied for can be up to **£1,000** in any one instance, normally not more than once in any 12 month period. Whilst the Trust's current guidelines do not permit-grant funding to cover normal living costs, in acute circumstances, and in consultation with the pastoral care Friend, the applicant may nonetheless submit more than one application to the Trust within this calendar year. Approval cannot be guaranteed.*
- c) *All other terms of the guidelines available on [www.suffolkquaker.org.uk](http://www.suffolkquaker.org.uk) apply.*
- d) *This scheme will offer these grant arrangements for the remainder of 2020.*
- e) *We ask pastoral care Friends to remind applicants that they should attempt to get mortgage and rent holidays during the crisis.*

This provision is extended to December 2021.