



## Pitstone Step-Up Grants Grant Making Policy & Application Guidelines

### 1. Charitable purpose and objective

Pitstone Step-Up Grants are administered by Pitstone Parish Charity (Charity Registration Number 261752). The trustee of the charity is Pitstone Parish Council. The trustee applies the funds of Pitstone Parish Charity at its discretion and in accordance with its charitable purposes:

The formal objects of the Charity are set out in its governing document, as follows :

- (1) *The object of the charity is the relief of persons resident in the area of benefit who are in need, hardship or distress.*
- (2) *The trustee may relieve persons in need by:*
  - a) *making grants of money to them; or*
  - b) *providing or paying for goods, services or facilities for them; or*
  - c) *making grants of money to other persons or bodies who provide goods, services or facilities to those in need.*
- (3) *In exceptional cases the trustee may decide to assist someone (who is otherwise qualified) who is:*
  - a) *resident outside the area of benefit; or*
  - b) *only temporarily resident in the area of benefit.*

NB: If you represent a local community group and are looking for assistance with funding towards a project specifically for your group, you may not meet the criteria for these Parish Charity funds. However, please note that Pitstone Parish Council runs a grant scheme to help local groups with expenses for equipment or events. It can offer grants to community and voluntary bodies provided they meet the criteria. Please email [parishclerk@pitstone.co.uk](mailto:parishclerk@pitstone.co.uk) for further information as this scheme may be better suited to assist your group.

### 2. Priorities for support

The number and value of grants that can be supported by the trustee is necessarily limited to the amount of funds that are available for distribution each year. The trustee has determined that the current priorities for funding are as described in this policy.

The priorities for support will be reviewed by the trustee periodically and may be adapted depending upon circumstances and the perceived effectiveness of the application of funds. Any change to these priorities will still fulfil the charitable purpose and objectives of the charity.

### 3. The Pitstone Step-Up Grants Programme

Pitstone Step-Up Grants are designed to enable the long-term transformation of the recipient's quality of life in some way (and thus relieve hardship, need or distress), rather than to provide a short-term sticking plaster fix. This could be through removing barriers to enable an individual to pursue a life-improving opportunity that would otherwise have been unaffordable, or to complete some form of training or upskilling that will demonstrably improve their professional or earning potential, where funding is not available from another source.

In each of the following grant categories the objective is to offer support to those to whom the most difference is likely to be made, so priority will be given to applications that can best demonstrate the positive impact that the grant will have on the lives of recipients.

The stated normal maximum amounts available will be reviewed annually but the trustee may consider awarding grants for amounts that exceed these guidelines if the applicant can demonstrate that there is an exceptional need or situation, and if funds permit.

Grants may be considered for multiple years where applicable, but an award of a grant in one year is not a guarantee of funding for subsequent applications.

#### A: Education Step-Up grants

These will enable the recipient to pursue opportunities as part of their formal education that would otherwise be unaffordable. They can be used to meet costs associated with accessing any level of formal education from primary school to postgraduate or gaining professional qualifications.

The maximum grant will normally be £1,500.

### **B: Career Step-Up grants**

These enable the recipient to undertake training or obtain specific tools or equipment in order to make a step change in their ability to pursue a particular career and enhance their earning potential.

The maximum grant will normally be £2,500.

### **C: Life Step-Up grants**

These will cover the costs of particular activities designed to enhance life skills through specific experiences.

The maximum grant will normally be £1,000.

### **D: Community Organisation Step-Up grants**

These will contribute towards the costs of a specific project being undertaken by any community organisation active within the Parish where the work is intended to serve those in the parish facing particular barriers in life. They can be used towards capital or revenue costs but cannot be used to cover core operating or annually recurring costs.

The maximum grant will normally be £5,000.

### **E: Helping Out grants**

Although it is anticipated that the vast majority of grants will be made within the four categories shown above, applications will be considered to assist with situations that do not fall within any of them. The same requirements will exist to demonstrate a clear need and show what the impact will be on improving the quality of life of the recipient.

The maximum grant will normally be £1,000.

## **4. General Criteria and Guidelines for all Applications (individual or community group)**

1. Each application will be considered on its own merits. Any decision to previously support similar work, causes or activities will not be considered to have set any precedent in decision-making.
2. The trustee will carry out sufficient due diligence to ensure that the request or situation meets both the charitable purposes, and the priorities for support set out in this policy.
3. The trustee body reserves the right to carry out sufficient due diligence on any potential beneficiary (individual or organisation) to ensure:
  - a) The identity of the beneficiary;
  - b) That funds are not knowingly used for:
    - i. Money laundering in accordance with the operative Money Laundering regulations;
    - ii. Terrorist financing in accordance with the Terrorist Act 2000;
    - iii. Bribery in accordance with the 2010 Bribery Act.
4. Successful applicants cannot apply for any other grant from the charity for a period of 12 months from the date of submission.
5. Unsuccessful applicants may be able to re-apply depending on the reason for being declined – see section 8.2 below.
6. Wherever possible grants will be paid directly to the body that is delivering the relevant goods or services. Requests for exceptions to this must be clearly explained within the application.
7. If the applicant is proposing to use a particular supplier or service provider they need to explain on the Application Form why they feel this is the most appropriate solution. Where appropriate this should include evidence that three different quotations have been obtained before choosing that supplier.
8. The trustee reserves the right to select the service provider that is to be used and will normally favour local suppliers and those with the required formal accreditations/qualifications.
9. Applicants will normally be invited to attend an interview as part of the application process.
10. Applicants will need to show that they are resident within the parish (also see paragraph 5 and 6.1 a) below)
11. Each application must describe:
  - a) The category of grant for which the applicant is applying.
  - b) The amount being sought and a clear cost breakdown of how it will be spent.
  - c) Any deadlines that need to be met in making a decision on the application or effecting payment if successful. E.g. Course enrolment deadlines, start of term etc.
  - d) The company, institution or other organisation that the applicant would prefer to provide the service/activity that is the subject of the grant and the reasons why.
  - e) The improvement to the life of the recipient as a result of the grant-funded activity. Where possible this should be expressed as a SMART objective. [i.e. the objective should be:
    - i. **S**pecific – what is the exact outcome or result of the activity?
    - ii. **M**easurable - how will success be shown?
    - iii. **A**chievable – show that this is something that is definitely possible with the grant.

- iv. **Realistic** - show that there is a good chance of success.
  - v. **Time-bound** - explain that there is a clear timescale by which the objective will be met.
12. Each application must also give details of how impact will be measured and reported back to Pitstone Parish Charity.
  13. Not all grants will be offered for the maximum amounts indicated within this policy and the Parish Charity also reserves the right to award sums smaller than that being sought.
  14. Exceptionally the Trustee may consider an application under a category other than that for which the applicant originally applied.
  15. Any grant offered may be made subject to specific conditions eg further information to be supplied prior to payment (such as proof of acceptance of entry onto course) or the grant to be paid in instalments.
  16. In accepting a grant, the applicant accepts the terms and conditions outlined within the grant offer.
  17. Grants must only be used for the purpose outlined in the application and the trustee reserves the right to ask for evidence that they have been. No funds can be redeployed to alternative uses and in the event of any funds being unused, used other than for the purposes stated in the application or remaining surplus to the applicant's requirements, this **MUST** be reported immediately to the Administrator and returned to Pitstone Parish Charity.
  18. It is for the applicant to check the effect of receipt of a grant on their personal circumstances such as tax or benefit entitlement.
  19. In accepting a grant, recipients automatically give permission for their story to be used in an anonymised and generalised form by the trustee to demonstrate its public benefit and promote the grant scheme.

## 5. Specific Criteria for Individual Applicants

To be eligible an individual applicant must live within Pitstone Parish boundaries or demonstrate a clear link to the Parish, for example having recently relocated elsewhere having lived there for a significant period.

## 6. Specific Criteria for Community Organisations

1. To be eligible an organisation must:
  - a) Be based within Pitstone Parish boundaries or provide evidence that the project to be funded will provide benefit to the parish.
  - b) Have an up-to-date Safeguarding policy that it submits with its application.
  - c) Demonstrates its compliance in delivery of services and activities with the Equality Act 2010.
  - d) Have its previous year accounts available for scrutiny.
  - e) Provide a copy of a bank statement less than 3 months old to evidence that they have a dual-signatory bank account in the name of the organisation into which the grant will be paid. No grants will be paid into individual or other single-signatory bank accounts.
  - f) Be able to provide a budget for the project and demonstrate that the project can be delivered within the grant or that it has the balance already in hand.
2. Applications from organisations must be signed by an appropriate authorised office holder. E.g. Chair of Trustees or Management Committee.
3. When attending the interview with the Charity, each representative will need to show that they have permission to speak on behalf of the organisation.
4. Applications will need to show that the benefits of the grant will be experienced within the parish.
5. Any Conflict of Interest, whether actual or that may reasonably be perceived, relating to the application (for example where anyone related to those making the application may benefit) must be declared as part of the application.
6. Each application must describe:
  - a) The amount being sought and details of the source of the balance of funding if the overall project cost is greater than £5,000;
  - b) The SMART objectives of the work that the grant will fund;
  - c) A plan and budget for how it will be delivered within 12 months of receipt;
  - d) Details of how impact will be measured and reported back and how the organisation will seek to learn from it;
  - e) Plans for promoting the work facilitated by the grant and its impact;
  - f) Details of how impact will be measured and reported back to Pitstone Parish Charity.
7. Pitstone Parish Charity welcomes applications from faith charities. However, its grants must not be used for any activity that involves proselytising or promoting that faith.
8. Where the grant is for a specified project or purpose it should not be drawn down until the work is ready to proceed. In situations where funds have been drawn down, but that project or activity does not proceed or where any grant or part thereof remains unused after 12 months, all unused/surplus funds must be reported to the Administrator and returned to Pitstone Parish Charity.

## 7. Administration – Internal Use

1. For all grants the trustee should be confident:

- a) Of the purpose of the proposed grant including an understanding of the work/activity and the way in which the grant will be managed and applied.
  - b) Of the person(s) responsible for the management of an organisational grant and for overseeing the work.
2. All grants to organisations will be paid to the recipient organisation's named, dual-signatory bank account – not to the personal account of any individual, or to any single-signatory corporate account.
  3. All grants will be provided by means of an electronic banking transfer. The charity's normal payment authorisation process will be applied to all payments.
  4. Where formal written applications have been received, or other records maintained, these will be stored and subsequently disposed of in accordance with the charity's policy on data protection and prevailing GDPR guidelines.

#### **8. Decision making**

1. The decision of the trustee on whether to award a grant is final. There is no appeals process should a decision be unfavourable to an applicant.
2. The trustee is not obliged to provide an explanation to applicants in the event that their application is not successful or is granted for a lesser sum than was applied for but will endeavour, where possible, to give feedback to assist any future application.

#### **9. Monitoring and Evaluation**

An evaluation form must be submitted to the trustee at the completion of each grant-funded activity.

#### **10. Review**

This Step-Up Grant policy was adopted by Pitstone Parish Charity on .....14/3/24.....

minute reference ...6..... and will be reviewed on at least an annual basis.

Signed on behalf of Pitstone Parish Charity by:

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Chairman