

York Common Good Trust
(registered charity no. 503556)

Grant-making policy

1. Purpose

The purpose of this policy is to set out the principles, criteria and processes that govern how York Common Good Trust (“the Trust”) makes grants.

A grant is defined as a financial award the Trust makes from its funds to support charitable activities, usually to registered charities or charitable community groups, but sometimes to other bodies or individuals.

2. The Objects of the Trust

Under the terms of the Trust Deed dated 11th December 1974 the objects of the Trust are to issue lump sum grants mainly to existing charitable/community groups within the City of York (‘Unitary Authority’ area) and the surrounding district, particularly those that are intrinsic to the City, but may also include individuals working in the City for the benefit of its citizens who are not themselves registered as a charity but who cannot make progress within their efforts through lack of resources.

3. Priorities for support

Grants are made to help people rather than the environment.

Preference will be given to requests received from locally based voluntary groups rather than large national charities.

The number of requests which can be supported by the Trust is, of necessity, limited to the amount of funds available for distribution.

4. Principles

In awarding grants, the Trustees will apply the following principles:

- All applications from previous recipients of grants or from previously unsuccessful applicants will be considered by the Trustees on their own merits. Although the Trustees will have regard to the outcome of the previous application, any new application will in no way receive preferential or adverse consideration.
- Both successful and unsuccessful applicants will typically not be considered for second and subsequent applications within 12 months of their most recent grant application decision.
- The Trust will not normally make individual awards for sums in excess of £1,000.

5. Exclusions

The Trustees do not support requests for projects involving “bricks and mortar”.

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6. Grant application process

All applications for grants should be completed in conjunction with this policy. The preferred method is by electronic means either using the online application form on the Trust's website www.yorkcommongoodtrust.org.uk or by email to secretary@yorkcommongoodtrust.org.uk. Applications made by post should be sent to Charles Walker, The Secretary, York Common Good Trust, 54 Bootham, York, YO30 7XZ.

7. Information requirements before awarding a grant

- Name of organisation (or applicant)
- Status (charity number if registered) and purpose of the organisation
- When established
- Details of the officers of the organisation
- Name, address, email address, telephone number and role of the person making the application
- Description of project / purpose for which funding is sought
- Total cost of project and amount applying for
- Details of fund raising, including any other organisations approached
- Details of funding already received for specific project
- 'Safeguarding' – (if relevant) details of procedures in place to safeguard young and vulnerable people in the care of the organisation, including a copy of any policy document
- Latest accounts or financial statement
- Confirmation that the organisation is UK resident
- Bank account details (in the event of the application being successful) – account name, sort code, account number

8. Assessment process

All grant applications will be subject to initial assessment by the Trust's Secretary to ensure that they meet the basic criteria for funding. Applications must be prepared to provide such other information as the Trustees may reasonably require in order to assist them in their decision-making process. Grants will be considered by the Trustees at their meetings (usually held quarterly in January, April, July and October/November) and the Secretary will aim to contact all applicants informing them of the outcome of their application for funding as soon as possible following the Trustees' meeting. In exceptional circumstances, urgent applications may be considered by the Trustees between meetings.

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Assessment process (contd.)

Applicants should note that, as with many other charitable trusts, the Trust may receive more applications in any given quarter than it has funds to support. Even if an application fits within the criteria and priorities of the Trust, and a detailed assessment has been made, the Trust may still be unable to provide a grant. In these circumstances, with the agreement of the Trust and the applicant, the grant application may be deferred and carried forward for further consideration at the next meeting.

The decision of the Trustees on whether to award a grant is final.

The Trustees will not be obliged to provide an explanation to the applicants should their application be unsuccessful.

9. Applicant and partner due diligence

The Trustees will carry out sufficient due diligence on any potential beneficiary to ensure the identity of the beneficiary and that funds are applied in accordance with the applicant's charitable purpose.

In cases where the Trust is not the only supporter of the work or project, and to protect its reputation, the Trustees may choose to extend any due diligence beyond the proposed beneficiary and to include other partner supporting organisations.

The Trustees will adopt a risk rated approach to due diligence. Risk factors will include the size of grant and the nature of the relationship between the Trust and the applicant.

Where the proposed beneficiary is well known to the Trustees and the relationship has been long standing and well established, the amount of due diligence undertaken is likely to be reduced.

10. Administration

With the agreement of the Trust and the beneficiary, grants will be provided by means of an electronic banking transfer or a cheque. The Trust's normal payment authorisation process will be applied to any payments.

Where the grant is for a specified project or purpose, and in situations where that purpose does not proceed or where any grant or part thereof remains unused, unused funds must be returned unless the beneficiary submits a formal request to retain the funds for some alternative purpose acceptable to the Trustees at their absolute discretion.

Adopted on 14 April 2022