



# Community Funding – Policy and Processes

## Introduction

The Trustees (Board) of Westray Development Trust (WDT) have the ultimate responsibility of ensuring the assets of the charity are used to their full potential and for the benefit of the community of Westray. The Board can choose to delegate authority to sub-groups as it sees fit. The purpose of this document is to set out the levels of authority within the community turbine fund project evaluation processes as well as grant purpose and eligibility criteria.

WDT's Grant Budget as a whole is set annually by the Board and presented to the AGM. The WDT financial year runs 1st July to 30th June and the figures presented to the AGM for budget purposes are based on the income from the previous fully completed financial year. For example, at the 2014/15 AGM (held around November) the budgets presented were for the 2015/16 financial year and based on the income from 2013/14. The income for the Grant Budget is derived from WDT's net income which includes contributions from its trading subsidiaries, micro-turbine income and any other rents, donations or sources of income.

The Board has set the following funding categories within its Grant Budget;

- Community Grants
- Entertainment Grants
- Education & Training Grants
- Investment Budget

As well as the grant funds, the Board has set up a community business loan scheme. There is a separate policy document for this.

## Who has the authority to allocate funds within these budgets?

There are four levels of authority within these processes: the Board, the Project Evaluation Group (PEG), the Financial Sub group and the WDT Staff team.

The *Community Grants* are controlled by the Board. Before the Board decides on any community grant applications the Project Evaluation Group (PEG) first assess and score the application before making a recommendation to the Board.

The *Entertainment Grants* and the *Education & Training Grants* are managed by the Trust Staff who assess each application against a set of criteria provided by the Board. The Trust staff have been allocated the authority by the Board to approve funding to a maximum of £500 under the Education & Training Grant scheme and £700 under the Entertainment Grant scheme.

The *Investment Budget* is controlled by the Board. Before the Board decides on any community grant applications the Project Evaluation Group (PEG) first assess and score the application before making a recommendation to the Board.

In line with best practice procedures, generally accepted by grant providers, there is no right to appeal any decision made by the Board or any of its delegated agents.



## **Grant Policy**

All activities that the Trust carries out must be in line with the Charity's governing document, The Articles of Association. The Articles of Association sets out the charitable objectives of the Trust and also states the powers that the Trust has in order to fulfil its charitable objectives.

The charitable objectives of the Trust are:

1. To provide in the interests of social welfare, facilities for recreation and other leisure time occupation available to the public at large in Westray, with a view to improving their conditions of life;
2. To advance education and in particular to promote opportunities for learning for the benefit of the general public;
3. To protect and/or preserve the environment for the benefit of the general public;
4. To provide or assist in the provision of housing for people in necessitous Circumstances within Westray;
5. To relieve poverty particularly among the residents of the island of Westray;
6. To advance the arts, heritage, culture and science;
7. To relieve those in need by reason of age, ill-health, disability, financial hardship or other disadvantage (includes relief given by the provision of accommodation and care);
8. To regenerate the community of Westray by the maintenance or improvement of the physical, social and economic infrastructure;
9. To promote, establish, operate and/or support other schemes and projects of a charitable nature for the benefit of the community of Westray.

Everything that is funded through the grants and loan schemes stated in the introduction must fit under one or more of these charitable objectives. In addition, any project that is applying for funding under the Community Grant scheme must also be assessed and scored against the following criteria:

- Objectives – does the project have clear correlation with the charitable objectives of the Trust?
- Need – does the applicant show evidence of need?
- Impact – what will be the resulting benefits of this project and how will these be measured?
- Achievability – can the organisers of the project deliver it to a satisfactory conclusion?
- Costs – does the project offer value for money?

## **Procedure**

Anyone wishing to apply for funding should contact the office for an application form or download a form from the Trust website. Trust staff will be available to assist and advise in the completion of applications. The Trust staff will contact the applicant to confirm that the application has been received. Each application will be given a unique reference number and any correspondence regarding the application should contain it.

**For Entertainment & Education Grants;** The Trust staff will carry out an assessment on the application within 10 days of receipt and inform the applicant in writing of the decision.

**For Community Grants and Investment Budget;** The PEG meets every 3 months, usually within two weeks before a WDT Board meeting to discuss and assess each application against an approved scoring matrix. Dates for these meetings will be published on the website and in the local press but applicants should be aware that the funding meeting will generally be the first Tuesday in October, January, April and July and therefore, the PEG meeting will generally be during mid-September, December, March and June. The Board has the final decision on Community and Investment Budget Grants.

Successful applicants will receive an award letter, two grant acceptance forms and a copy of the terms and conditions document which should be read carefully, both copies of the grant acceptance form should be signed and one copy returned to the Trust office. Funding will only be paid when WDT receives the signed acceptance form and receipts.

Applicants should be aware that if successful, their name or the name of the organisation, the name of the event/project and the amount of grant will be made public by means of the WDT website, social media and in the local press and may be used to promote the work of the Trust. This information will also be published in the Westray Development Trust Annual Report. Applicants may also be asked to provide photographs and/or a short report for this.

Please note that there are limited funds and projects will be prioritised so there is no guarantee that applicants will receive what they have applied for even if they think that they meet with all the criteria.

### **Entertainment Grants (EG) – Criteria**

The Entertainment Grants scheme was developed to meet objective 1: *‘To provide in the interest of social welfare, facilities for recreation and other leisure time occupation available to the public at large in Westray with a view to improving their conditions of life’.*

This grant was designed to enable groups to put on events that would be open to and benefit the community of Westray. In particular the Board recognises that the cost of bringing entertainment to the island could be seen as prohibitive if the group who wishes to put on the event would have to make a full cost recovery or were looking to fundraise. Therefore, a group may apply for funding of up to a maximum of £500 per event, which should be strictly used for costs associated with that event only. For example, this may include band hire, room hire, band accommodation and travel etc. The grant is to put on events in Westray only.

The group must make it clear in its application how the event will benefit members of the Westray community. If the event is being held to raise funds for charities off the island, this must be stated in the application to the Trust and it made clear how this will be of benefit to Westray or if members of the Westray community have benefitted personally from the charities. Applications requiring over £500 can be considered under the Community Grants scheme.

**Maximum of £700 per event.**



**Education & Training Grants (ETG) – Criteria**

The Education & Training Grants scheme was developed to meet charitable objective 2: *“Advancing education and in particular to promote opportunities for learning for the benefit of the general public.”*

Education & Training Grants are limited to 50% of course fees up to a maximum of £500 per person per year. For example, if a course were to cost £2,000 the individual would not be granted £1,000 but be capped at a £500 grant. The term ‘course fees’ covers the cost of lessons/coaching and any examinations that are part of the course. It does not cover travel, equipment purchase/hire or any additional costs.

The courses eligible for these grants are for personal development either socially, academically or vocationally. Statutory workplace courses will not be considered, as your employer should cover this cost. In the case of individuals who wish to obtain a full driving licence, WDT will fund up to 50% of the costs of up to 10 hours of lessons per person, 1 theory test and 1 practical driving test. This can only be obtained once per individual. Applicants must be ordinarily resident on Westray i.e. Westray is where they live for most of the year.

Applications submitted retrospective (i.e. after the course/training has occurred) will not be considered. Applications that are submitted, but which are not assessed prior to the commencement of the training will still be considered.

**Maximum grant of 50% of course fee cost. This is capped at a maximum of £500 per person per year. Individuals must be ordinarily resident in Westray.**

**Community Grants (CG) – Criteria**

This grant scheme is for projects that;

- Have direct benefit to Westray residents.
- Contribute to the charitable objectives of the Westray Development Trust
- Fit well with the key themes of the Westray Development Plan or identified priorities.

		Benefits	
		Remain on Westray	Benefit leaves Westray
Location of Event	<b>Event occurs on Westray</b>	Meets with charitable objectives e.g. Westray Regatta	Meets with charitable objectives e.g. Island Picnic or Bisgeos Run
	<b>Event does not occur on Westray</b>	Meets with charitable objectives e.g. Children’s visit to Poland	Does not meet with charitable objectives e.g. completing the West Highland way for Oxfam

The Community Grants will fund between £50 and £50,000 at a maximum of 80% of the total cost of the project. The Board may fund more than 80% at their discretion if they feel circumstances require it.

Please note that there are limited funds and projects will be prioritised so there is no guarantee that applicants will receive what they have applied for even if they think that they meet with all criteria. Applications over £50k will be considered for the Investment Budget.

**Community Grants are between £50 and £50,000. WDT will fund a maximum of 80% of the total cost of a project in this scheme.**

### **Investment Budget (IB)**

The Investment Budget is available for large, one off and unique projects that are beyond the limits of the Community Grant scheme (£50,000). Applications will be considered throughout the year and will be considered by PEG and the Board, then generally announced at the following AGM. Investment Budget Grants will cover a maximum of 80% of costs. It is however at the Board's discretion to fund more than 80% if they feel circumstances require it. Please note that there are limited funds and projects will be prioritised so there is no guarantee that applicants will receive what they have applied for even if they think that they meet with all the criteria

**Large, one-off, unique projects over £50,000. Maximum of 80% of cost.**