

J G DURANT TRUST

Guidelines and Terms and Conditions for applicants

ABOUT THE J G Durant Trust ('the Trust')

The Trust came into being further to the Will of John Grendon Durant who passed away on 22 January 1947.

CONSTITUTION

The Constitution of the Trust was last revised and adopted on 8 May 2011.

Extract. The objects of the Charity are the receipt of interest from CCLA and any other income from other sources and the provision of grants on applications made by bodies and groups within North Tawton which benefit the parishioners of North Tawton. The Charity shall not provide grants to national bodies nor to individuals within North Tawton.

The income and any property of the Charity shall be applied solely towards the promotion of the objects of the Charity. The Trustees shall be the Councillors of North Tawton Town Council; any such Councillor may decline to be a Trustee.

INVESTMENT FUNDS

The capital sum is invested with Coif Charities investment fund in conjunction with the requirements of CCLA. The Trust receives dividends and interest on the capital, which is held in a separate bank account. Grant applications are primarily paid from the accumulated dividends and interest; however, the Trustees have discretion to draw from the capital sum so support larger projects.

ACTIVITIES - HOW THE CHARITY SPENDS ITS MONEY

To make grants to organisations which specifically benefit the residents of North Tawton.

WHAT THE CHARITY CAN FUND:

General Charitable Purposes

Amateur Sport

Environment/conservation/heritage

Recreation

Other Charitable Purposes

REGISTRATION HISTORY:

18 December 1990: Standard registration

GIFT AID:

Not recognised by HMRC for gift aid.

CHARITABLE OBJECTS

FOR THE BENEFIT OF THE INHABITANTS OF THE PARISH OF NORTH TAWTON

AREA OF BENEFIT

The area the charity can operate in, as set out in its governing document - PARISH OF NORTH TAWTON

Contact Information

Address: 14a The Square, North Tawton, Devon, EX20 2EP






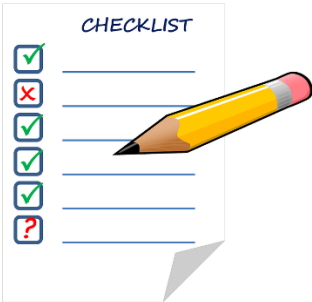
Phone: 01837 880121

Email: townclerk@northtawtontowncouncil.gov.uk

Website: <https://northtawtontowncouncil.gov.uk>

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<p>THE FIVE ELEMENTS</p> <p>Please ensure you complete all five elements of the application.</p> <ul style="list-style-type: none"> • Contact and bank details. • The big picture – a description of what you want to achieve. • Costed estimates of each element or stage of your project • A copy of your latest accounts or in the case of new start-up organisation – a copy of a costed business plan • How your project helps the community of North Tawton 	
<p>ASSESSING YOUR APPLICATION</p> <p>From the five elements above, the Trustees perform an assessment. This enables the Trustees to consider the application against community benefits.</p> <p>We assess how long the Trust's investment in your project will last. From your reserves, turnover and other resources available to you, we assess the resilience of your organisation to see the project through.</p> <p>The Trustees will compare your project to others received by the closing date of each 'round' of grants. Voting will be based solely on the information provided by the applicants. (<i>See Terms and Conditions</i>)</p>	
<p>ACCOUNTS</p> <p>It is essential to have the latest accounts which include the most recent bank statement.</p> <p>New Start-up organisations must provide a costed business plan which shows potential income streams and any items of committed expenditure for the year ahead.</p> <p>We also require full listing of funding from other organisations for your project, or other organisations you plan to approach for funding.</p>	
<p>TICKING THE BENEFITS BOXES</p> <p>The JG Durant Trust provides funding for capital projects (i.e not day to day running costs). In asking you to identify the benefits on the application form, it makes it easier if you consider what your organisation wishes to achieve over the next five years.</p>	
<p>QUOTATIONS</p> <p>The Trust cannot make payment for items already purchased. Where estimates are time-limited, please highlight this information with your application. We will accept estimates/quotations from webpages which will ideally include the date the page was downloaded, as well as printouts of pdf files.</p>	
<p>THE CHECKLIST</p> <ul style="list-style-type: none"> • Are as many benefits ticked and justified as far as possible? • Latest annual accounts (or business plan) enclosed? • Estimates enclosed? • Is the application signed and dated (signed means you comply with our Terms & Conditions). 	

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TERMS & CONDITIONS FOR GRANT APPLICANTS

In general, Grants will only be available to properly constituted registered charities, charitable clubs or societies or other 'not for profit' organisations that are able to demonstrate community benefit and are based within the geographic area of North Tawton Parish.

The Durant Trust will provide match-funding and not full costs of your project; therefore, you are required to provide evidence of how the outstanding balance will be met, (i.e. reserves, existing funds or application for other grants).

All grant monies awarded, must be spent within 12 months of receipt of the grant.

The Trust welcomes applications that can contribute towards projects designed to achieve any of the following local benefits and priorities:

- Benefit physical health and mental well-being.
- Promote care and support of disadvantaged or vulnerable people.
- Encourage and support voluntary activity, community spirit and participation through social, sporting and cultural activities.
- Improve local employment opportunities.
- Produce deliverable benefits to local communities which provide a sustainable legacy over an extended period of time.
- Provide environmental benefits which contribute to energy efficiency initiatives.

In particular, you must evidence the following:

NEED – Let us know about the clear need for the project and what support you have from the local community. If you have undertaken any research or consultation with those who will directly benefit – tell us about it.

USE – In order for us to assess the full benefit of your application, you need to tell us about the community use of your project.

INVOLVEMENT – The most successful projects are usually those with an excited community willing and ready to be involved with the project.

COST – You need to think about the cost of your project and make sure you have budgeted carefully. List the realistic costs on the form and attach:

- Copies of balance sheet or audited accounts for the last financial year, or if this is a new set-up, details of your 'business plan' and detailed costings.
- Tenders, quotations or estimates including VAT.
- For building projects, details of any planning permissions sought or granted, and details of Building Regulations approval sought or granted.

LEGACY – we need to know if your project has a legacy or if it requires on-going maintenance. If that is the case, tell us how you plan to sustain this and the effect on your future revenue stream.

THE APPLICATION PROCESS.

The Durant Trust will invite applications twice a year through local press, social media and Town Council notice boards and website. Copies of the application form will be made available either in hard copy from North Tawton Town Council Office, 14a The Square, North Tawton EX20 2EP, request via email to townclerk@northtawtontowncouncil.gov.uk, or via the website <https://northtawtontowncouncil.gov.uk>

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A closing date for applications will be included within the advert and the Trustees will meet within one month of the closing date to consider applications.

All applicants will be notified of the decision and if successful, payment will be made to the organisation by Cheque.

All successful grant awards will require a written progress report to be submitted to the Trust within six months of receipt detailing how the monies have been spent to date, and a final report detailing completion of your project with full costs within twelve months of receipt of the grant, to fulfil the Trusts annual reporting requirements.

Unspent grant monies are to be returned to the Durant Trust within 12 months of receipt, unless a written request for an extension has been received and approved.

Failure to provide this report, may result in your organisation being refused future grant monies.

Should the project fail within 24 months of the receipt of grant monies, the Trust may claim a right to any equipment bought with the grant monies awarded.

Any grant awarded, in principal or in full, must be used solely for the project approved. Use of grant monies for any other purpose other than that specified in the grant application and subsequent approvals is strictly forbidden.

If circumstances dictate that the grant is no longer required for its original purpose, but a new purpose has been identified, a new grant application must be submitted.

WHAT WILL NOT BE FUNDED

- Projects for organisations who are geographically based outside the parish of North Tawton, including regional charities even though their beneficiaries may be based with the parish boundary.
- Projects that are funded by local authorities or other statutory bodies that are deemed to be the statutory obligation of the Government, local authorities or agencies thereof.
- Improvements to land that is not open to the general public.
- Projects or activities promoting political or religious objections, including but not exclusively for improvements to the organisation's buildings.
- Deficit or retrospective funding (i.e any material purchases, services or other activities that have already taken place).
- Projects or activities which support an individual or individuals who are not acting on behalf of a group or organisation with the capacity to benefit the wider community.
- Projects and activities likely to cause community disharmony.
- Applications for projects made by individuals or agencies where commission or other payment is made to that individual or agency.
- Applications for projects made by individuals or agencies for re-distribution to other separate individuals or agencies.
- Salaries
- Professional fees.

TERMS & CONDITIONS

By signing the application form, applicants understand and agree that:

1. Any grant awarded must be used exclusively for the purposes set out in the application.
2. Organisations who are successful in being awarded a grant, but who are registered for VAT or are able to reclaim VAT, will be awarded grant payments at net cost only (i.e. excluding VAT).
3. Organisations who have successfully been awarded a grant will not be permitted to apply for another grant from the Trust for a period of twelve months.
4. In some cases, the Trustees may request representatives of the organisation to attend a meeting to present and discuss their project proposals.

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5. In the case of larger projects where the applicant organisation hopes to raise match funding from other sources, the JG Durant Trust may issue an Agreement in Principle letter which will confirm the fund has committed a given amount of expenditure towards the stated project and this grant payment will be withheld until the applicant organisation is in receipt of the match-funding payments, or until the expiry of the Agreement.
6. In the case of larger projects, the award of a grant for a 'pilot' project or the first stage of a project does not imply a commitment to fund any subsequent stages of the work.
7. No change of use will be permitted for grant payments without prior written consent from the JG Durant Trust.
8. It is not permitted to sell or dispose of any equipment, or any other assets purchased with the grant without prior written consent from the JG Durant Trust.
9. Any grant from the Trust, cannot be used to pay for expenditure incurred or committed prior to the date of receipt of the application form.
10. The applicant organisation will acknowledge the JG Durant Trust in any publicity or annual report following receipt of any grant.
11. The grant will not be increased in the event of a project overspend.
12. The applicant organisation will keep all financial records and accounts, including receipts for items purchased with the grant for at least two years from payment of the grant. The Organisation will make these available to the JG Durant Trust on request. This does not release the Organisation from statutory obligations to keep financial records for longer periods.
13. The JG Durant Trust reserves the right to withhold or request repayment of a grant or any part of it in the following circumstances:
 - a) If there is any breach of this contract.
 - b) If the application form and supporting documentation was completed dishonestly or with incorrect or misleading information.
 - c) If the applicant organisation does not take steps to ensure equal opportunities in their employment practices, membership and delivery of their services.
 - d) If any member of the Governing body, staff or volunteers have acted dishonestly or negligently in respect of the work at any time during the project.
 - e) If the applicant organisation fails to complete the project within any timeframe specified in the Approval letter.
 - f) If the applicant organisation ceases to operate, is dissolved or insolvent or is put into administration, receivership or liquidation (sequestration), or an arrangement is made with creditors.
14. If the applicant organisation is dissolved, the Governing body will agree a solution relating to the disposal of equipment or assets paid for by the grants with the JG Durant Trust.
15. These terms and conditions will remain in force so long as any of the grant funds remain unspent and until relevant reporting and evaluation procedures set out in the approval letter have been met. In the case of capital expenditure, these terms and conditions will remain in force until the end of the normal working life of the asset(s).
16. Applicant Organisations must complete their project event or purchases within twelve months of the award date and submit an 'End of Award' report within six months of the completion of the event or purchase of the funded equipment/services.

END

J G DURANT TRUST GRANT

Data Protection Privacy Statement

Applications for grants require the submission of personal information about the individual on whose behalf the application is made. The Trust may hold sensitive personal data about that person if included in the application form. The Trust needs this information in order to enable the Trust to decide on whether to award a grant.

The Trust also holds personal information about:

- beneficiaries of the Trust's grants funded by the Trust
- individuals identified in the application
- its trustees and secretary.

When the Trust receives personal information from an organisation on behalf of an individual the Trust needs to ensure that any personal data and sensitive personal data is disclosed to the Trust with the full knowledge and express consent of the individual.

The Data Protection Act 2018 ("DPA") requires the Trust to protect personal data and to use it only for specified purposes. The Trust is registered as a data controller for the purposes of the DPA, reference **C1379643**.

The Trust makes every effort to keep personal data and sensitive personal data secure and to comply with the legal rules about how the Trust processes or uses this information. The Trust has assessed the risk of unauthorised disclosure of personal data and sensitive personal data and believes that it has established appropriate physical and electronic procedures to ensure the security of the personal data and sensitive personal data that the Trust holds.

The Trust processes or uses the personal data and sensitive personal data it holds for the following purposes:

- assessing the application for a grant;
- awarding or declining a grant;
- maintaining records of the application and any grant;
- confirming that the information supplied is accurate;
- The Trust will only use an individual's name and photograph with the express consent of the individual, otherwise names will be changed.

The Trust will not disclose sensitive personal data to anyone else without the individual's express consent.

Personal data and sensitive personal data may be retained by the Trust whether or not a grant is made. The Trust intends to hold such data for a limited period, usually up to six years, although some applications may be retained for a longer period for the purposes of archive records.

If the Trust holds and uses personal information about an individual, the Trust will, upon request, tell an individual what information it holds, why it holds such information and, if asked, will provide a copy of such information. Requests to see an individual's own personal information should be submitted in writing to the address above.

APPLICATION FORM

Name of Organisation:	
Contact Name:	
Position / Role:	
Correspondence address:	
E-mail Address:	
Telephone No.:	
What is the purpose of your organisation? (Include details of your aims and objectives and who benefits from your organisation)	
Is your organisation –	
- Registered for VAT	If yes, please enter VAT No.
- a registered charity? – Yes/No	If yes – provide Charity No.
- a club or society formed by charitable purposes. Yes/No	
- a “not-for-profit” organisation. Yes/No	
List previous grant applications received from the J G Durant Trust in the last 5 years and purpose of the grant	

About your Project.

The title of your project. (This should be a short name which describes your project and could be used for publicity.

What do you need funding for? Please provide details about your project and what it is designed to achieve:

Why does your community need this project. (Describe what need have you identified and any consultation or research you have undertaken which established this need.

Who will benefit? Include details of any particular groups of people:

When will your project take place?	Start		Finish	
Are you working with other groups to deliver this project? Describe any dependency you may have on other groups to enable you to deliver the project:				
Dependent? Yes / No				

Project Costs and Sources of Funding

How much will your project cost?		
Total cost of project	£	This should be the total of purchases and VAT derived from the breakdown of the main costs below
Your contribution	£	This could be cash or in kind (e.g., the value of volunteer hours)
Match Funding grants applied for or to be applied for from other parties	£	Break down each grant application to other parties if applicable
AMOUNT REQUESTED FROM THE DURANT TRUST FUND	£	This is the amount of grant you are applying for from the Trust
Please provide a breakdown of the main cost elements of your project:		
Item or Activity	Cost	
Total Cost		

Note – the Trustees require estimates or quotations for items of expenditure. These may be printed webpages for smaller items purchased on-line, or copies from trade-person's estimates or quotations set against your specifications.

Are you applying for funding from elsewhere?	
List any other funding applications you have made for this project and their status.	

Will funding from the Durant Trust trigger match-funding from elsewhere? If so, please provide details.	
How will the project continue once any grant funding runs out? Identify the effect delivery of the project will have on future annual revenue income and expenditure.	

Enter the amount of your reserves from your last accounts	£
Enter projected amount of reserves at the next year-end from your budget	£
If the variance between the two amounts exceeds 10%, identify key projected items of expenditure including the contribution from your reserves likely to be spent on this project.	

For Building Projects only.

Does the project require planning permission?	Yes / No
Has planning permission been applied for?	Yes / No
Describe the proposed use of the site:	

Details of the proposed development: (Please attach plan)	
List any restrictions that may apply:	

Is the property Freehold or Leasehold?	
If leasehold, please identify -	
- length of lease:	
- date of termination:	
- amount of annual rent:	£
-Name & Address of Owner:	
If a building is to be acquired, please attach a professional report giving details of its construction, age, present condition, drainage and services available.	
Is the building a listed building?	Yes / No
If yes, are there any restrictions likely to be imposed by other bodies? (e.g., English Heritage) If yes, please attach details:	Yes / No

Your Financial Arrangements

Please provide us with details of your bank or building society account:	
Name on account:	
Account number:	
Sort Code:	
Bank / Building Society:	
Address:	

No. of signatures required on cheques:	
Date of your end of financial year:	
Please attach your latest end of year accounts:	Attached – Yes. No – Please provide reason not attached

Authority to apply for funding.

Declaration			
We, the undersigned, confirm that, to the best of our knowledge and belief, all replies given on this application form are true and accurate. We understand that supporting information may be requested at any stage of the application process. By signing this application, we agree to abide by the terms and conditions as stated in the guidelines and any further conditions given to successful applicants at the time of funding being awarded. If our application is successful, we agree to provide feedback and, where possible, photographic evidence on our project to DBCC. We understand that DBCC, RES Ltd and the wind farm owner reserve the right to reference successful applicants for publicity purposes.			
Signature 1		Name	
Position		Date	
Signature 2		Name	
Position		Date	

For some applications, please note that the Trustees may wish to conduct a site visit

Please return the completed printed form, accounts and any attachments to:

Durant Trust

c/o North Tawton Council Offices

14a The Square

North Tawton

EX20 2EP

townclerk@northtawtontowncouncil.gov.uk

01837 880121