

# **Thea and Heinz Skyte Charitable Trust (the "Charity")**

## **Grant making policy**

### **1. The objects of the Charity**

The Charity's objects as set out in its constitution are:

“For the public benefit in Leeds:

- a) The advancement in life of young people by making grants for education and training and
- b) The relief of financial hardship by provision of grant funding for education and training.

Nothing in this constitution shall authorise an application of the property of the CIO for the purposes which are not charitable in accordance with section 7 of the Charities and Trustee Investment (Scotland) Act 2005 and section 2 of the Charities Act (Northern Ireland) 2008.”

### **2. Priorities for support**

- 2.1 The number of projects which can be supported is, of necessity, limited by the amount of funds available for distribution in any year.
- 2.2 The trustees have decided that the priorities over the coming years will be:
  - 2.2.1 Grants, normally between £300 and £600 per grant, for educational and/or training purposes, to
    - 2.2.1.1 advance in life and relieve the need of individuals aged between 14 and 30 who are resident in Leeds; and
    - 2.2.1.2 (on an exceptional basis) grants to charitable or not-for-profit organisations, provided it is possible to identify the individual young person who will benefit from such a grant, in accordance with 2.2.1.1.
- 2.3 Although the trustees will consider each application on its own merits, the Charity will normally give grants to support the following:
  - 2.3.1 course/training fees (e.g. for a young refugee/immigrant who needs to learn English);
  - 2.3.2 travel costs (including, for example, payment for taxis for a young person where an impairment may prevent them from travelling to/from a training or educational establishment by public transport);

- 2.3.3 course materials;
- 2.3.4 books and equipment e.g. IT equipment;
- 2.3.5 work clothing for an apprenticeship or work experience, e.g. work boots, PPE (where not otherwise required to be provided by the statutory authority);
- 2.3.6 IT software and/or services e.g. purchase of Microsoft Office or other programmes, cost of or contribution towards broadband provision for a fixed period; and/or
- 2.3.7 other education / training needs considered on a case-by-case basis.
- 2.4 The Charity will not normally give grants to support the following:
  - 2.4.1 regular outgoings, such as rental payments
  - 2.4.2 everyday living costs such as food, clothing (other than work clothing as set out in 2.3.5 above)
- 2.5 The trustees will periodically review the priorities for support set out in this policy and may change them at any time.

### **3. Outcomes to inform what the Charity supports**

The following list of outcomes will inform the Charity's grant giving to young people within the criteria set out in this policy:

- 3.1 acquisition of skills, knowledge, and expertise by young people to develop career opportunities for those in financial need who otherwise would be excluded;
- 3.2 enhanced self-esteem, confidence, and resilience in young people by empowering them to believe in their potential abilities and talents;
- 3.3 improved social mobility amongst young people through expanded career and life prospects;
- 3.4 assistance to refugees and asylum seekers and their dependents to fully integrate into the local community and wider society, for example by acquiring or improving their use of English; and/or
- 3.5 reduction of the chances of grant recipients entering crime, anti-social behaviour, or disengaging from education, employment, or training (NEET).

### **4. Exclusions**

The following will not be supported by the Charity:

- 4.1 funding for items that are deemed to be the responsibility of statutory services;
- 4.2 investment in business start-ups;
- 4.3 large national charities or charities dedicated to issues which the trustees already deem to be well funded within the UK; or
- 4.4 others, as informed through the receipt of grant applications.

## 5. Principles

In awarding grants, the following principles will be applied:

- 5.1 Grants must only be given in furtherance of the Charity's objects for the public benefit. Charity Commission guidance should be followed when determining whether sufficient public benefit can be evidenced.
- 5.2 The Charity will not give grants in cash.
- 5.3 The trustees may decide to uplift the normal grant award of between £300 and £600 on a case-by-case basis.
- 5.4 Residency criteria – residency must be established by checking the electoral roll where possible, or otherwise by proof from the young person's school or educational establishment, by attendance on a course, or by any other means considered appropriate by the trustees on a case-by-case basis.
- 5.5 Whilst the trustees do not want to exclude young people who are the subject of a court order, they have a duty to protect the Charity's assets and must therefore take proportionate and appropriate steps to guard against fraud or dishonesty. Applicants will therefore be asked to declare whether they are the subject of a current sentence of any description, and further information may be required where an applicant indicates this is the case. The application form on the website should make it clear that the existence of a current sentence will not in and of itself preclude the applicant from receiving a grant, but further questions may be asked where this is the case. A letter from such an applicant's probation officer may be needed in order to mitigate risk to the Charity.
- 5.6 Advancement in life and relief of need or financial hardship criteria – these will need to be determined, and shall be evidenced through:
  - 5.6.1 the application process, which will require the grant applicant to (i) explain how the grant will advance them in life/relieve need or financial hardship and (ii) articulate what the outcome for them will be if they are unsuccessful in securing a grant from the Charity. This will help the trustees determine whether the grant for education or

training purposes will help advance the young person in life / relieve financial hardship.

5.6.2 where additional checks are appropriate, the following means of verifying need/financial hardship might be considered:

5.6.2.1 guarantor / parental statement;

5.6.2.2 letter from school or college; and/or

5.6.2.3 acceptance documentation for a specific course.

5.7 The trustees may, on an exceptional basis, decide to award unsolicited grants to registered charities, exempt charities, and excepted charities.

5.8 If a grant is to be made to an organisation, the following evidence should be considered in order to verify the grant recipient:

5.8.1 registration with Charity Commission for a charity (if the intended recipient is a charity, its objects must be compatible with those of the Charity);

5.8.2 copy of constitutional document/by checking the public register at Companies House;

5.8.3 evidence of regulation by another statutory authority (e.g. by Department for Education for an exempt school or college); and/or

5.8.4 reviewing the organisation's accounts/website

5.9 The Charity may only work together with other grant-giving organisations to fund initiatives beyond the financial scope of a single organisation.

## **6. Grant application process**

6.1 The trustees will normally expect applications for grants to be made through the Charity's website, but unsolicited applications received by way of email or letter may also be considered. All applications will be assessed against the agreed eligibility criteria.

6.2 The trustees meet at regular intervals and will consider grants to a set sum at each meeting, that sum being set in accordance with the funds available.

6.3 Unfortunately, the number of applications the Charity receives may mean that not all projects which meet the basic criteria and the priorities of the Charity receive funding from the Charity.

6.4 The trustees should (in the early stages of the Charity's life) respond to all applicants via email (or in exceptional circumstances by letter), whether

successful or not. This policy will need to be kept under review, and may be varied depending on the number of applications received.

- 6.5 Successful applicants should not be precluded from making a second application to the Charity for grant funding. The usual grant criteria will need to be applied on every occasion, and each application will be considered on its own merit.

## **7. Assessment process**

- 7.1 All grant applications will be subject to initial assessment to ensure that they meet the basic criteria for funding.
- 7.2 For grant assessment purposes, trustees should be provided with the following:
  - 7.2.1 the name and contact details of the person making the application and, if they are making the application on behalf of an organisation, the name of that organisation;
  - 7.2.2 how much money the applicant is applying for;
  - 7.2.3 what other sources of funding the applicant has obtained for the relevant project;
  - 7.2.4 information about how the grant will be used and how it will be managed effectively for its intended purpose;
  - 7.2.5 the timescales for the project; and
  - 7.2.6 for larger grant requests, the trustees may invite the applicant to meet with them; and
  - 7.2.7 such other information as the trustees may reasonably require.
- 7.3 It is noted that there needs to be a degree of flexibility in assessing applications, so that the Charity can reach as many young people as possible.

## **8. Documenting grants**

- 8.1 All decisions regarding the making of grants must be formally recorded/internally documented.
- 8.2 Letters will be sent to successful applications for small grants, setting out the amount of grant, how the grant must be applied, and what information is required from the grant recipient for the purpose of monitoring the grant and assessing impact.

- 8.3 Larger grants (if any) may need to be documented in a formal grant agreement.

## **9. Monitoring and publication**

- 9.1 It is the policy of the trustees to monitor all grants made. Given the size of grants (£300 to £600), an email or letter from the grant recipient setting out their progress and the impact of the grant will normally be sufficient for monitoring and impact assessment purposes.
- 9.2 Ways of assessing the impact of the grant and ensuring that it has been applied as intended might include asking for a report from recipient, parent, school, educational establishment, and/or social worker (if appropriate).
- 9.3 For larger grants:
- 9.3.1 further conditions may be stipulated appropriate to the size and nature of the grant; and
  - 9.3.2 the trustees may arrange to visit grant recipients to monitor progress and how the grant is being spent.
- 9.4 The trustees reserve the right to withdraw grants or to decline further grants where applicants fail to provide progress reports either at all or on time, or they provide unsatisfactory progress reports.

## **10. Serious incident reporting**

The trustees are under an obligation to protect the Charity's assets, including its reputation. Part of this responsibility is to safeguard the Charity's beneficiaries and to report serious incidents in accordance with Charity Commission guidance. The trustees will reflect on this further once the grant-making programme is established, and a safeguarding policy will be prepared in due course.

Policy adopted on 12 January 2024. Next review due: January 2025