



## ROCHESTER BRIDGE TRUST

### Grants Policy – Estate

The Trust's main charitable purpose is to provide crossings of the River Medway. It makes funds available for grants only when it has long-term surplus funds after providing for its main purpose. Grant programmes reflect the Trust's own history, values and activities. Details of the programmes and application process are published on the Trust's website.

Some grants are made in the areas where the Trust owns significant agricultural or commercial property.

Applications may be made for one or more of the following charitable grant purposes:

- A. The advancement of education (including research) in:
  - i. engineering or mathematics;
  - ii. agriculture, including viticulture and horticultural food production;
  - iii. the history of the Rochester Bridge Trust's estates; and
  - iv. the history of bridges and bridge engineering;
- B. the advancement of environmental protection or improvement;
- C. restoration of the historic fabric of Listed or Scheduled heritage buildings, structures and sites, which conserves features of historical importance;
- D. the advancement of education and heritage by means of the interpretation of the historic fabric of historic sites, structures and artefacts; and/or the undertaking of archaeological investigation;
- E. the promotion of facilities for recreation or leisure to improve conditions of life in the interests of social welfare in the community.

*The Trust does not make grants for the advancement of religion; animal welfare; sport (except connected with the River Medway); directly for the prevention or relief of poverty; or for any purpose which is not charitable under the definitions of the Charities Act 2011. There are other exclusions as set out in the Conditions for Award of Grants below.*

Potential applicants should not submit an application unless their project promotes one or more of the charitable objects; is for public benefit; **and** complies fully with **all** the conditions set out below. Applicants are invited to contact the Trust by email to [enquiries@rbt.org.uk](mailto:enquiries@rbt.org.uk) with any queries before applying.

### Conditions for Award of Grants

#### Applicants

1. Grants will be made only to a registered, exempt or excepted charity; educational establishment; or other organisation with a charitable purpose or delivering an exclusively charitable project.

*Registered charities MUST:*

- a. *be up-to-date and have a sound record of reporting of accounts to the Charity Committee website on time where applicable. Charities with an income of less than £10,000 must provide two-years' accounts when requested; and*
- b. *provide a copy of the charity's approved Reserves Policy; and*
- c. *have at least three trustees in post (or the minimum required by its Charity Commission Scheme where this is a higher number).*

*Other organisations MUST:*

- d. *have a written constitution and a separate bank account; and*
- e. *have at least three named office holders; and*
- f. *provide two-years' accounts when requested.*

*All organisations must be based in the United Kingdom and should usually have been in existence for at least two years before making an application. Grants to non-charities, including non-charitable Community Interest Companies, are only made in exceptional purposes and will be subject to due diligence procedures.*

2. Grants will not be made to individuals, other than in the case of the award of Rochester Bridge Trust scholarships, bursaries and prizes.

### **Geographical Eligibility**

3. Grants are only made where the project directly benefits all or part of one of the following areas. Maps showing the detailed areas of eligibility are available on the Trust's website. Applicants may be based outside these areas, provided the project benefits specifically those inside the eligible area.

Holme, Conington or Sawtry Parishes (Cambridgeshire)

Pilham, Corringham, Springthorpe or Heapham Parishes (Lincolnshire)

Parts of Almondbury, Kirkburton or Holme Valley Parishes (West Yorkshire)

4. This policy also applies to the areas in the historic county of Kent where the Trust has a significant property holding, namely the following parishes: Borough Green, Boxley, Detling, Graveney with Goodnestone, Hartlip, High Halstow, Hollingbourne, Isle of Grain, Leeds, Newington, Thanington, Wrotham and Chalk Ward, Westcourt Ward, Rainham (South) Ward and Joyce Green Ward.

### **Capital and Revenue Funding**

5. Grants will be made primarily for capital works or for the purchase of materials and resources.
6. Grants of revenue funding may be made towards educational projects (including exhibitions, lectures and conferences), research and publications.

### **Size of Grants**

7. The grant sought from the Trust should represent 25% to 75% of the total cost of a project.

## **Application Process**

8. To maintain a fair and transparent decision process, applicants **must not** solicit support for their application from a member of the Court of Wardens and Assistants. Such solicitation will disqualify an application from consideration.
9. Any personal or financial connection between an applicant and a member of the Court of Wardens and Assistants, or a member of the Trust's staff must be declared on the application form or online system.
10. Applications must be made in writing by completing the form or using the online system as directed by the Trust's website for each grant programme.
11. Applications may be made by a trustee, office holder or employee of the applying organisation. Applicants may be asked for evidence that they have the authority of the organisation to make an application. Applications made by third parties (e.g. architects or fundraising consultants) are not accepted.
12. The outcome of applications will be notified by post or email. Decisions will not be notified by telephone.
13. When the offer of a grant is made, the potential recipient will be required to enter into a Grant Agreement and should not commit funds until the Agreement has been signed.
14. Funds will be released when evidence has been received of the placing of contracts or other relevant evidence of readiness to incur expenditure. Depending on the scale of the project and the size of the grant, payment may be made in instalments as set out in the Grant Agreement.

## **Evaluation and Prioritisation**

15. All applications are initially assessed by the Trust's staff by reference to the requirements of this Policy. Some smaller grants are awarded by senior officers under delegated authority. Applications for larger sums are considered by a Committee or the full Court of Wardens and Assistants.
16. Priority will be given to applications with a historic or current connection to Rochester Bridge or the River Medway.
17. Preference will be given to applications from organisations which have not previously received a grant from the Trust.
18. Governing documents, accounts and reserves policies will be evaluated to ensure the sustainability of the organisation and need for funding to the Trust's satisfaction.

## **Terms and Conditions**

19. A grant may not be used for any purpose other than that specified in the Grant Agreement, without the prior written approval of the Trust.

20. A grant offer will lapse in the absence of good cause to the satisfaction of the Trust, if not taken up by the deadline stated in the Grant Agreement.
21. The Trust will publish the award of grants on its website, in other publications, and through local media. Successful applicants are required to co-operate with the Trust's appointed advisors to organise publicity and press coverage.
22. Successful applicants will be required to provide progress reports as set out in the Grant Agreement. Failure to provide the information requested may result in the withdrawal of funding.
23. To minimise administration costs and waste for the Trust and grant recipients, the Trust's details should not be added to general mailing lists.

### **Grant Restrictions**

24. The Trust will not make retrospective grants towards the cost of projects already completed.
25. Grants will not be made for the purchase of vehicles or trailers (apart from heritage vehicles); VAT which may be recovered; professional fees; or office equipment, including IT equipment and furniture.
26. Grants for the restoration and conservation of heritage buildings will be made only for essential work to features of historic importance to a listed or scheduled building or structure. Grants will not be made under this heading for bells, organs, movable furniture or clocks or for routine maintenance or new facilities.
27. The definition of agriculture under this policy includes arable crops, orchards and livestock farming; viticulture; and horticulture for food production, but not ornamental gardens.
28. Except as specified in a call for applications for a Challenge Fund or Specific Grant Programme, grants will not be made towards staffing or other running costs, events (other than exhibitions, academic lectures and conferences), functions, newsletters, marketing, or publicity.