

GRANT APPLICATION FORM 2019-2020

Shinfield Parish Council offers a limited number of grants each year to organisations, clubs and charities which provide a service in the parish to its residents. Grants are generally awarded at the beginning of the financial year, although late applications may be considered.

All grant applications must be made using this form. Applicants must read the criteria and conditions carefully and supply the relevant information. The outcome will be notified in writing and in certain circumstances the grant may only be awarded if specific conditions are met. There is no appeal process if an application is turned down.

Please complete all sections of this form. You may expand the boxes if necessary.

Name of Organisation: Berkshire Vision

Grant request from Shinfield Parish Council: £1,000.00

For what purpose is the grant to be used? How will it benefit the residents of Shinfield Parish? We have Members in your area that we support with our services. The grant will be used to cover our core costs for providing these services within the Parish of Shinfield.

Have you applied to any other organisation for funding for all or part of this project/expenditure? If so, which organisation, and how much? None directly for residents in the Shinfield area apart from previous grant requests from the Parish and or statutory funders.

About your Organisation :

Briefly describe the role of your organisation within Shinfield Parish. We provide a broad range of services to our Members in the region including our home service, transport for our Members to and from our social clubs that provide a respite from the isolation and loneliness that being blind or partially sighted can bring. We also offer a range of sporting activity and outings for any Members that wish to be involved and we have a broad range of resources that Members can use to make their every day lives easier and offer more independence.

Where are you based? We are based in Reading and are a local Berkshire Charity, serving the communities of Berkshire, including Shinfield.

Number of members in your organisation? We have approximately 600 Members, both adults and children who are blind or partially sighted.

| | | | |
|---|------|--------------------------------|--------|
| Contact for this application: | | | |
| Title: | Miss | First name: | Gerry |
| | | Surname: | Harmon |
| Position held in organisation: Head of Fundraising & Marketing | | | |
| Contact address : Middleton House, 5 Erleigh Rd, Reading, Berkshire | | | |
| | | | |
| Postcode: RG1 5LR | | Telephone Number: 01189 872803 | |
| Email address: Gerry.harmon@berkshirevision.org.uk | | | |

DECLARATION

The following declaration must be completed by a senior contact on behalf of the applicant organisation.

I apply for grant aid on behalf of: _____Berkshire Vision_____

I declare that:

- the organisation named in this application form has authorised me to sign this application on their behalf;
- I have noted the conditions under which grants are awarded by Shinfield Parish Council;
- I confirm that if successful, I and the organisation which I represent, will abide by the conditions.

I undertake, on behalf of the organisation, any grant or such part as Shinfield Parish Council may determine, will be repaid if:

- The organisation is found to be in breach of the conditions applied to the grant;
- The grant ceases to be used for the purpose(s) for which it was given.

I certify that the information given in this application is true and confirm that the enclosures are current, accurate and adopted or approved by our organisation.

Signed: _____Gerry Harmon_____

Date: _____12/12/19_____

Name: (Block capitals): __Gerry Harmon_____

Position in organisation: ____Head of Fundraising & Marketing

Additional information required (please tick the box if included with your application):

| | |
|---|------------|
| Accounts | |
| Balance Sheet | |
| Annual report (if available) /Financial Statement | YES |
| Other | |

GRANT CRITERIA

The Parish Council seeks to maintain a balanced provision of grants with the principles of best value being applied in considering all applications.

1. Grants to organisations or charities serving in the community as a whole will take priority.
2. The purpose of the grant should be in the interests of, and bring direct benefit to, the parish or its residents.
3. The grant may be a contribution to the funds of a charitable body for the furtherance of its work in the local community.
4. Grants are not awarded retrospectively.

CONDITIONS OF GRANT

1. All organisations applying to Shinfield Parish Council for a grant must comply with Shinfield Parish Council's general criteria. The applicant organisation must complete all sections of Shinfield Parish Council's grant application form, including the declaration.
2. All organisations receiving grants will be required to acknowledge the grant and comply with any conditions specified.
3. All organisations receiving a grant should acknowledge Shinfield Parish Council's support in publicity and promotional activities. Shinfield Parish Council reserves the right to publicise the grant award in its own promotional material (for example, the parish newsletter, Annual Report)
4. As part of its application, the organisation must submit the following information: constitution or terms of reference, accounts/financial statement, annual report (if available) and balance sheets and latest available accounts.
5. Shinfield Parish Council reserves the right to monitor the way in which grants have been spent; organisations in receipt of grant aid must follow Shinfield Parish Council's monitoring requirements. For all grants awarded this will require the completion of a grant monitoring form giving the following information:; how the grant has been spent (copies of relevant invoices and receipts may be required); a statement of accounts for the year in which the grant has been made; evidence of benefit to Shinfield Parish, e.g. number of beneficiaries resident in Shinfield Parish.
6. Shinfield Parish Council reserves the right to seek to recover the grant and/ or any moveable equipment bought with the grant money if the organisation ceases to exist, or if the grant is not used for the purpose(s) in the original application to Shinfield Parish Council, or if the conditions of the grant are not met.

FINANCIAL REPORT YEAR TO 31 MARCH 2019

Berkshire Vision had a satisfactory year and we have seen the total funds of the charity increase by £172,865, to £2,769,344, due mainly to a very generous individual legacy of £400,000.

STATEMENT OF FINANCIAL ACTIVITIES

| Income | 2019 | 2018 |
|---|-----------------|-----------------|
| Legacies | 437,000 | 31,000 |
| Members subscriptions and general donations | 44,612 | 45,202 |
| Income from other trading activities | | 30,955 |
| Income from charitable activities: | | |
| • Unitary authority service agreements | 78,912 | 81,051 |
| • Other | 43,475 | 57,288 |
| Investment income | 53,635 | 61,309 |
| Total | £657,634 | £306,805 |

Income was higher due to the significant increase in legacy income, and it was pleasing to see unitary authority income broadly in line with 2018. Other income was reduced and steps are being taken to address this.

| Expenditure | 2019 | 2018 |
|--------------------|-----------------|-----------------|
| Fundraising | 30,415 | 35,321 |
| Visiting costs | 61,927 | 56,359 |
| Activities | 86,541 | 92,276 |
| Support costs | 379,323 | 175,115 |
| Governance cost | 9,950 | 8,760 |
| Total | £568,156 | £367,831 |

Costs were significantly higher as a result of increasing staff numbers which is part of the five-year strategy to improve services, and the costs relating to the refurbishment/upgrade of Midleton House.

| | 2019 | 2018 |
|---------------------------------------|------------------|-------------------|
| Income less expenditure | 89,478 | (61,026) |
| Net investment gains and losses | 83,387 | 48,222 |
| Gain on revaluation of Midleton House | | 501,233 |
| Net movement on funds | 172,865 | 488,429 |
| Total funds brought forward | 2,596,479 | 2,108,050 |
| Total funds carried forward | 2,769,344 | £2,596,479 |

BALANCE SHEET The net assets of the charity at 31st March were:

| | 2019 | 2018 |
|--|-------------------|-------------------|
| Tangible assets | 599,505 | 592,080 |
| Investments | 2,262,688 | 2,046,028 |
| Stock and debtors | 24,230 | 34,913 |
| Cash | 61,721 | 103,488 |
| Total assets | 2,948,144 | 2,776,509 |
| Creditors under one year | (44,953) | (32,898) |
| Creditors over one year (pension scheme deficit) | (133,847) | (147,132) |
| Net assets | £2,769,344 | £2,596,479 |

The net asset increased by £172,865 in the year, and this increase is reflected in the rise in the value of investments including cash of £174,893.

BERKSHIRE VISION

PATRONS

Mr Richard Benyon MP
Mr Chris Tarrant OBE

PRESIDENT

The Hon Mrs Jessica White

CHAIRMAN

Mr Gregory Wilkinson

CHIEF EXECUTIVE

Miss Louise Lucio-Palk

DIRECTORS/TRUSTEES

Mr David Brazier (Retired)
Mr David Few
Mr Martin Gubb
Mr Ian Fraser
Mrs Jenny Pape
Mr Don Reed
Mrs Pauline Robertson (Retired)
Mr Gerry Cowan

SOLICITORS

Blandy & Blandy LLP, 1 Friar Street
Reading RG1 1DB

BANKERS

National Westminster Bank PLC,
Market Place, Reading RG1 2EG

AUDITORS

Crowe UK LLP, 49-51 Aquis House,
Blagrove Street, Reading RG1 1PL

INVESTMENT MANAGERS

Rathbone Investment Management
Ltd, 8 Finsbury Circus, London
EC2M 7AZ

