



REPORT & ACCOUNTS 2023-2024

Trustees' Report

In September 2024 Jonathan Adnams stepped down as Chairman of the Adnams Community Trust, having been a trustee since the Trust's inception in 1990. He has worked hard for the Trust over the years and his input will be greatly missed. The trustees would like to thank Jonathan for all he has done. A new Chair will be appointed shortly.

In the year 2023-2024 the Adnams Community Trust awarded 44 grants totalling **£40,070**. A summary of the grants can be found on pages 7 to 11 of this report.

We were delighted to welcome guest speakers along to each of our meetings to broaden our knowledge and better inform our grant-making decisions. Our thanks go to Toby Lindsay-White from Project 47, a social supermarket in Leiston; Hannah Tuckwell and Alice from the Nest Farms near Framlingham, a care farm for young people with mental health issues; Jo Critch from Feathers Futures, a help centre for women in Great Yarmouth; and Kaya Thorpe and Beth Fleischer from Lowestoft and Waveney Breastfeeding Support.

The number of applications remained high despite a slight fall over the year. Income continues to be a challenge for the Trust with none able to be received directly from Adnams plc profits and only a very small amount from dividends, historically our two main sources of income. Adnams plc continues to support the Trust financially by covering all running costs. The Adnams Community Trust was able to award grants to help our community thanks to the generous bequest received in July 2022 from a former shareholder, Leona Levine, and donations from customers through the Pennies scheme online and in Adnams stores within 25 miles of Southwold, the Adnams Southwold 10k run, and individuals.

As outlined above, these are financially challenging times for the Adnams Community Trust so donations from shareholders and others are more important than ever. If you do not already donate to the Adnams Community Trust and would like to mandate your dividends, set up a standing order, remember us in your will or make a one-off donation, please contact Rebecca Abrahall, the Adnams Community Trust Administrator, communitytrust@adnams.co.uk, or donate online through the Adnams Community Trust TotalGiving page <https://www.totalgiving.co.uk/charity/the-adnams-community-trust>. Your full donation will go to help good causes, as all the Trust's administrative costs are met by Adnams plc.

If you know of an organisation that would benefit from a grant, do ask them to get in touch with the Trust's administrator, Rebecca. Application guidelines can be found later in this document.

I hope you enjoy reading the report of the grants awarded during 2023-2024.

A handwritten signature in black ink, appearing to read 'Jenny Hanlon'.

Jenny Hanlon

Director Trustee, on behalf of the trustees

THE ADNAMS COMMUNITY TRUST
RECEIPTS & PAYMENTS ACCOUNT 1 September 2023 TO 31 August 2024

These accounts have been prepared on a receipts and payments basis

2022/2023		2023/2024
£		£
<u>77,628</u>	Brought forward surplus	<u>19,893</u>
	<u>Income</u>	
0	Income from Adnams	0
264	Tax on Gift Aid and dividends	0
<u>3,095</u>	Returned grants	<u>2,439</u>
3,359		2,439
	<u>Donations</u>	
0	Total Giving	494
50	Speaking Fees	0
1,660	Individual donations	40,525
8,156	Pennies	5,561
79	Fundraising	365
<u>6,093</u>	Donations re Adnams 10K run	<u>2,951</u>
16,038		49,896
	<u>Dividends</u>	
0	Robinson Fund	0
<u>177</u>	Other shareholders	<u>177</u>
177		177
19,575	<u>Total income for the year</u>	52,512
<u>97,203</u>	<u>Total amount available for distribution</u>	<u>72,405</u>
	<u>Expenditure</u>	
(77,310)	Grants paid out during the year	(40,112)
<u>(77,310)</u>		(40,112)
	<u>Commitments</u>	
0	Previously committed	0
<u>0</u>	Commitments made this year	(1,500)
0		(1,500)
<u>19,893</u>	Carried forward to next year	<u>30,793</u>
	<u>Represented by</u>	
19,893	Bank balance	32,293
0	Less commitments	1,500
<u>19,893</u>	Surplus carried forward	<u>30,793</u>



13 November 2024

INDEPENDENT EXAMINER'S REPORT TO THE TRUSTEES OF THE ADNAMS COMMUNITY TRUST

I report to the trustees on my examination of the accounts for The Adnams Community Trust (the Trust) for the year ended 31 August 2024.

Responsibilities and basis of report

As the charity trustees of the Trust you are responsible for the preparation of the accounts in accordance with the requirements of the Charities Act 2011 ('the Act').

I report in respect of my examination of the Trust's accounts carried out under section 145 of the 2011 Act and in carrying out my examination I have followed all the applicable Directions given by the Charity Commission under section 145(5)(b) of the Act.

Independent examiner's statement

I have completed my examination. I confirm that no material matters have come to my attention in connection with the examination giving me cause to believe that in any material respect:

1. accounting records were not kept in respect of the Trust as required by section 130 of the Act; or
2. the accounts do not accord with those records.

I have no concerns and have come across no other matters in connection with the examination to which attention should be drawn in this report in order to enable a proper understanding of the accounts to be reached.



P N van Dijk FMAAT
van Dijk Accountants Limited
Georgian House
34 Thoroughfare
Halesworth
Suffolk
IP19 8AP

2 January 2025

THE ADNAMS COMMUNITY TRUST RISK & RESERVES POLICY

1. Risk Assessment – Internal Controls

- 1.1 The need for robust internal controls is fundamental to guarding against **reputational risk**, through poor decision making.
- 1.2 The Trust undertakes an annual **skills audit** to ensure that the Trustees are collectively competent to make informed and responsible decisions.
- 1.3 The Trust keeps a register of **interests** which is regularly updated. Potential **conflicts of interest** are declared at the start of every meeting to ensure decisions are bias-free. The Trustees take care to ensure that decisions are never taken in order to benefit the commercial objectives of Adnams plc.
- 1.4 The **loss of key staff** is not an issue because the Trust employs no staff but benefits from secretarial and administrative services provided free of charge by Adnams plc, which has the resources to ensure appropriate cover, as necessary.
- 1.5 Accurate minutes are kept and reviewed, and up-to-date financial statements provided for each meeting, to ensure Trustees have adequate **information** to assist decision-making.
- 1.6 Applicants dealing with children or vulnerable people are required to demonstrate that they have the appropriate **safeguarding** procedures in place.
- 1.7 **Data protection** is taken seriously. The IT systems provided by Adnams plc have high levels of protection and regular training is provided in GDPR (General Data Protection).
- 1.8 **Due diligence** is undertaken on grant applicants, including follow-up checks to ensure grants have been spent in accordance with the stated objectives.
- 1.9 **Regulatory compliance** is checked against Charity Commission guidelines and updated as necessary.

2. Risk Assessment - Funding

- 2.1 The risk for most charities can be summarised as a risk to future **income** (because of poor investments or for other reasons) and/or a risk from excessive future **commitments**, which (if income fell short of expectations) might endanger the operations of on-going recipients of charity funding. In the case of the Adnams Community Trust, the risk to future income is mitigated by the avoidance of future commitments.
- 2.2 The primary sources of **income** are from Adnams plc activities and from dividends on Adnams shares (a mixture of legacy income and mandates from existing shareholders). Both are at serious risk at present because the company has struggled to remain profitable since the onset of COVID-19 and the subsequent economic difficulties that the country has faced. The Trust has been able to turn to other sources of income such as the Pennies electronic cash box, but these, too, have been adversely affected, and recent donations have only been possible because of a substantial legacy from a shareholder, Leona Levine.
- 2.3 These risks to income have been offset by the policy of the **Adnams Community Trust not to give funds on an on-going basis**, year on year, but to make one-off donations to achieve immediate specific ends. Under these circumstances the risk of being unable to fulfil commitments to recipients is very small.

- 2.4 The Trustees do not, therefore, feel it necessary to accumulate large Reserves to cover significant potential shortfalls in income or contingent liabilities. This policy will be reviewed on an annual basis.

3. Reasons for Reserves

- 3.1 Although the typical donation from the Adnams Community Trust is quite small, the Trustees wish to be able to fund more **significant local ventures**, as and when these occur, and it is therefore felt prudent to maintain a Reserve against this possibility.
- 3.2 Applications are occasionally received where funding is '**time-critical**', particularly in the case of matched-funding, and the Trustees wish to be able to respond promptly in such circumstances. This will only be possible if funds are held in Reserve.
- 3.3 Applications in any given quarter may exceed the funds available but may, nonetheless, be **deserving** of a positive response. Once again, a Reserve will allow for greater flexibility in meeting local needs.
- 3.4 It may be prudent to deal differently with **large legacies or other unusually large donations**, either by holding such funds in reserve against larger than usual projects or by spreading their disbursement over a number of years when other funding sources are insufficient to meet our normal pattern of giving.

4. Reserve Policy

- 4.1 For the reasons outlined above, the Trustees feel it prudent to accumulate a Reserve up to a **maximum of 20%** of annual income.
- 4.2 The percentage retention, and the Risk Assessment which helps justify this Policy, will be **reviewed on an annual basis**.
- 4.3 As noted above, the Trustees may decide to deal differently with the proceeds of large legacies or other donations, holding such funds in reserve for a longer period, but this should **not normally exceed five years**.

Reviewed October 2023

THE OBJECTS OF THE ADNAMS COMMUNITY TRUST

The Adnams Charity was established in 1990 to mark the centenary of Adnams as a company and changed its name to the Adnams Community Trust in 2016. The objects of the Adnams Community Trust, as laid out in the Trust Deed, are:

- 1 the promotion of high standards of planning and architecture in or affecting Southwold, the preservation protection development and improvement of features of public interest in Southwold and the promotion of civic pride in Southwold;
- 2 to promote the provision of facilities in the interest of social welfare for recreation and leisure time occupation with the object of improving the conditions of life for the inhabitants in the area of benefit;
- 3 the promotion and support of musical artistic and other cultural activities within the area of benefit;
- 4 the relief of sickness and poverty among the disabled and other persons in the area of benefit;
- 5 the preservation development and improvement of features of environmental scientific or public interest in the area of benefit;
- 6 the promotion advancement or support of such one or more exclusively charitable purposes as the Trustees think fit.

The Adnams Community Trust fulfils its objectives by giving modest grants for specific items to worthy causes within 25 miles of Southwold in Suffolk, for public benefit.

THE ADNAMS COMMUNITY TRUST TRUSTEES

The Adnams Community Trust trustees bring with them a wealth of experience and knowledge.

- Jonathan Adnams OBE – Chairman and Original Trustee until September 2024
- Helen Williams – Elected Employee Trustee
- Clare Teasdel – Elected Employee Trustee
- Samantha Crocker – Elected Employee Trustee
- Juliet Grimes – Co-opted Trustee
- Andrew Heald – Director Trustee from October 2023
- Guy Heald – Co-opted Trustee until October 2023
- Melvyn Horn – Co-opted Trustee and former Adnams plc employee
- Simon Loftus OBE – Original Trustee
- Geoff Stevens – Co-opted Trustee
- Dr Andy Wood OBE DL – Director Trustee until July 2024
- Jenny Hanlon – Director Trustee from July 2024

In accordance with the Trust's Trust Deed there may be up to three Director Trustees, three Elected Employee Trustees and four Co-opted Trustees who may or may not be employees of the company, and those Original Trustees who have not retired. All trustees give their time freely, no remuneration is paid. The Trust's Conflict of Interest and Conflict of Loyalty Policy is followed when awarding grants.

The trustees meet quarterly (usually January, April, July and October) to award grants in line with the guidelines to be found on pages 12 and 13 of this Report and dependent upon the funds available.

GRANTS AWARDED

Education

St Edmund's Primary School, Hoxne, is a rural school with 61 pupils. The trustees awarded a grant of **£438.99** to purchase a reading shed to make the library area more appealing to the children.

Friends of Occold Primary School raise funds to support the school's 45 pupils. The trustees awarded a grant of **£551.32** to purchase a storage shed, tools and equipment for a Forest School.

Friends of Rockland St Mary School raise funds to advance the education of the school's 50 pupils. The trustees awarded a grant of **£711.56** to purchase recorders and glockenspiels.

Morabe Rural Music provides music tuition, instruments, performance opportunities and community projects for the pupils of Eyke Primary School and the wider community. The trustees awarded a grant of **£1,000** to purchase violins and replacement strings so that more children can take home a stringed instrument and take up one-to-one lessons.

The Friends of Albert Pye School in Beccles raise money to support the school's 400 pupils. The trustees awarded a grant of **£1,739** to purchase a moveable interactive whiteboard.

The Friends of Acle St Edmund Primary School work to advance the education of the school's 187 pupils. The trustees awarded a grant of **£743.99** to purchase a shed for the storage of fundraising equipment.

Pakefield High School is a non-selective state school with 691 pupils aged 11 to 16. The trustees awarded a grant of **£537** to purchase expedition equipment so that pupils could participate in the Duke of Edinburgh's Award Scheme.

Alde Valley Academy in Leiston has 586 pupils; 22.9% are in receipt of free school meals and 21% have Special Educational Needs. The trustees awarded a grant of **£1,500** to purchase shelving and books for the school's new library.

Health & Social Welfare

Riding for the Disabled Woodbridge & District Group provides therapeutic riding and carriage driving for children and adults with physical and/or serious learning difficulties, and those with mental health issues. The trustees awarded a grant of **£653.98** to purchase mobile safety steps and a rollout trackway to be laid over the surface of the riding arena. Both will make accessing carriages easier for wheelchair users.

The Nest Farms provides mental health support to at-risk young people aged 11 to 25 years through care farming activities such as working with animals and plants, growing vegetables, carpentry and mechanics. The trustees awarded a grant of **£959.95** to purchase power tools which will allow clients to maintain animal enclosures, fences and hutches, and make raised beds, bird boxes and bug hotels.

Adult Social Care at Suffolk County Council provides support for a 65-year-old male with cerebral palsy who lives in sheltered housing. The trustees awarded a grant of **£300** to purchase a new mattress to improve his quality of sleep.

Headway Suffolk provides rehabilitation and care for adults with a neurological condition, helping clients become more independent and mobile and improving communication skills. The trustees awarded a grant of **£500** to purchase resources for use at outreach centres in Aldeburgh and Leiston.

Sunflower Community Care Farm CIC, Snape, is an award-winning care farm for vulnerable adults with disabilities and/or mental health issues. Attendees look after animals, plant and harvest vegetables and care for the environment. These activities help with issues such as depression, anxiety, PTSD, low self-esteem and low confidence. The trustees awarded a grant of **£832.75** towards the cost of rubber matting for field entrances.

Emmaus Norfolk and Waveney (ENW) is a non-religious charity based in a former convent near Ditchingham which provides a home for people aged 18 and over who have experienced homelessness or the risk of homelessness. Residents (known as Companions) can self-refer or be referred by an agency or another person. Companions must sign off benefits and commit to volunteering for up to 40 hours a week in ENW's social enterprises. The trustees awarded a grant of **£968** to prepare a shower room ready for a new floor to be laid in Holy Cross House, which is home to 16 Companions.

Suffolk County Council's Adult and Community Services care for an individual from Lowestoft who suffers from numerous serious health conditions. The trustees awarded a grant of **£1,040** to make up the funding shortfall for a dual-motor riser-recliner chair which will greatly improve the individual's quality of life.

Lowestoft & Waveney Breastfeeding Support provides support for new parents, including breastfeeding community cafés, home visits from qualified lactation consultants, breast-pump hire, babywearing community sessions and perinatal mental-health drop-in sessions. The trustees awarded a grant of **£459.65** to purchase three baby slings which will be made available for families to trial in community sessions.

Happy Days Children's Charity provides respite breaks, residential group activity holidays, day trips and visiting-theatre performances for children and young people aged 3 to 17 with special needs from poor socio-economic backgrounds. The trustees awarded a grant of **£1,074** to cover the cost of a stay in a youth hostel as part of a London sightseeing trip for a group of 12 boys from the Great Yarmouth area.

Break Charity works across East Anglia to provide support for children and young people who have been taken into care, are leaving care or who need respite care. The trustees awarded a grant of **£911.94** to purchase a UV tactile panel for the sensory room at Break's respite-care centre in Long Stratton.

Chedgrave Oxygen Therapy Centre provides access to high-pressure oxygen therapy for adults living with multiple sclerosis and other conditions. The trustees awarded a grant of **£1,079.10** to purchase two chairs for patient use in the oxygen-therapy sessions.

The Arts

Creative Collisions, based in Great Yarmouth, designs and delivers creative programmes for young people aged between 11 and 25 in partnership with Norfolk Museums Service, local high schools and further education colleges. The trustees awarded a grant of **£200** to pay for art materials for a Saturday Club at the Tide and Time Museum.

The Lowestoft Players is a charitable theatre company set up to promote, improve, develop and maintain the education and appreciation of music and the theatre in the Lowestoft area. The trustees awarded a grant of **£1,150** to purchase a poster light box, to be used to advertise upcoming shows.

Halesworth Harmony Choir is a non-audition, "by ear" a cappella community choir with 36 members from the Halesworth area. The choir meets bi-monthly at the Cut. The trustees awarded a grant of **£560** to pay for a singing workshop for choir members and the wider community.

Recreation

Leiston FC Youth has approximately 60 members aged between 4 and 16, a mix of boys and girls. The trustees awarded a grant of **£1,000** towards the cost of footballing equipment for training and matchdays.

Saxmundham Adventure Playground provides an outdoor play area for local and visiting children. The trustees awarded a grant of **£915** to pay for the basketball backboard and hoop to be updated to meet current safety standards.

Woodbridge Table Tennis Club provides weekly sessions attended by people of all ages. The Club has around 70 regular players and is run by a committee of volunteers. The trustees awarded a grant of **£974.98** to purchase a table tennis table, net and posts.

Oulton Broad Water Sports Centre is a Community Interest Company which offers a range of water-sports activities including sailing, kayaking, canoeing, power-boat courses and wind surfing. The trustees awarded a grant of **£720** to purchase 12 small-to-medium buoyancy aids.

The Loft Youth Club is a community-led youth group based in the Stella Peskett Hall in Southwold. The Loft provides a place for young people to learn skills, socialise, volunteer and get support in a safe environment. The trustees awarded a grant of **£589** to purchase a multi-games table – a reversible pool and air hockey table with a table tennis top.

Gorleston Clifftop Festival is a free annual family orientated festival organised by local volunteers to provide low-cost entertainment in an area of high deprivation. The Festival includes live music, a children's area, a fun fair, a dog show and fireworks. The trustees awarded a grant of **£1,000** to pay for a magic show and circus-skills workshops for the children's area.

Framlingham Sports Club is responsible for 16 acres of sports land and aims to provide facilities to enable people to participate in their chosen sport. The trustees awarded a grant of **£1,000** towards the cost of new floodlights for the main football pitch, which is used by Framlingham Town Football Club, the U18s team and the running club.

First Light Festival CIC is a not-for-profit arts organisation which provides a free annual arts festival on Lowestoft's South Beach over the weekend closest to the summer solstice. In 2023 the Festival was attended by over 40,000 people, 70% of whom came from Lowestoft. The trustees awarded a grant of **£1,295** to pay for the hire of a marquee for the Planet Positive Zone, focusing on Lowestoft's growing green-energy sector, climate change and environmental issues, helping to raise awareness and educate.

Exchange 2 is based in the Cabin on Harleston Recreation Ground and provides free drop-in facilities for young people from Harleston and the surrounding villages. The trustees awarded a grant of **£600** to pay for two ten-week gym courses for twenty young people.

Topcroft Cricket Club runs senior teams, a women's and girls' team, an over 40s team, numerous junior teams and provides free youth training for children aged five and over. The trustees awarded a grant of **£1,395.85** to purchase youth kit as the current kit is tired and not fit for purpose.

Southwold Model Yacht Regattas organises and runs model-yacht regattas on the boating lake north of the pier in Southwold. Model yachts have been sailed competitively in Southwold for over 100 years. Anyone can enter the regattas and there are boats available to borrow. The trustees awarded a grant of **£261.93** to purchase new pond flags and an awning to provide shelter during the season.

Eastern Rivers Community Gym Loddon is a not-for-profit organisation which provides low-cost gym facilities for the local community. It is run by volunteers but employs a professional trainer who carries out initial assessments for all members and prepares tailored exercise regimes. The trustees awarded a grant of **£1,259.58** to purchase gym flooring mats.

Buildings/Community Facilities

Yoxwood Trust is a community group of volunteers who meet once a month to maintain this community woodland. Yoxwood is well used by members of the community for picnics, parties, meeting up with friends, drawing and painting, school visits, walks, and observing nature. The trustees awarded a grant of **£902.40** to purchase two recycled-plastic picnic tables.

The Fressingfield Shed aims to prevent people from becoming socially excluded by providing facilities where they can meet to take part in woodwork, gardening and modelling activities. The trustees awarded a grant of **£1,000** to purchase building materials for a veranda.

Middleton Village Hall is well used for village meetings and activities. It has a main hall, meeting room, a well-equipped kitchen, accessible toilets, a storeroom, and parking. The trustees awarded a grant of **£850** to replace the concrete in the pathway outside the main entrance to the hall to prevent it from becoming a trip hazard.

Earl Soham Village Hall was built in 1934 and is used for many community events. It is well equipped with a main hall, meeting room, stage, sprung floor, wi-fi, kitchen, events lawn, drop-down screen for films, PA system and parking. The trustees awarded a grant of **£850.68** to replace a currently boarded-up window high in the eaves of the building.

Southwold and Waveney Valley Regeneration Society Ltd (SouthGen) was set up in 2015 to purchase Southwold Hospital, in partnership with Hastoe Housing Association. The Old Hospital is now home to Southwold Library, the Geography Fieldwork Academy, a café and a nursery. Many of SouthGen's community activities are centred around food – they offer pay-what-you-can-afford sessions, a family tea club and cookery classes. They also maintain a heritage orchard and have taken on an allotment to teach the nursery children how to grow fruit and vegetables. The trustees awarded a grant of **£1,800** to purchase the materials needed to construct a custom-made wooden storage shed, to be used to store equipment for SouthGen's holiday camp, allotment tools and donated food.

Holy Trinity Church Middleton-cum-Fordley is well used by the local community for church services and special events. The large churchyard is used by walkers. The trustees awarded a grant of **£1,000** towards the cost of building work to prevent land from the churchyard falling into nearby gardens – the landslide problem was caused by work carried out in the mid-1800s.

Denham Community Council supports the parish council in the renovation and maintenance of the village hall on behalf of the parish. The village hall is part of Horham Airfield and is the only community facility in this very rural village. The trustees awarded a grant of **£518** to purchase a fridge and a freezer for the hall's new kitchen.

Bungay Town Council is working with a group of volunteers on a community-led project to turn Annis Hill Green, a former school playing field, into a community green space with native trees, a wildflower meadow and mown paths, accessible by all members of the community, including those with mobility issues. The trustees awarded a grant of **£1,250** to purchase fencing and gates for a disabled-parking area.

Brockdish and Thorpe Abbots Allotment Association provides allotments for local residents and is run by a committee of volunteers. Membership is open to all. The trustees awarded a grant of **£1,148.23** to purchase a lawnmower, brush cutter and safety equipment for communal use.

Knodishall Village Hall is run by a group of trustees for the local community. It is used for many regular activities and classes and is also available for private hire. The trustees awarded a grant of **£1,828.27** to install energy-efficient LED lighting.

Returned Grants

Orford CEVA Primary School received a grant of £1,125.88 to purchase items to improve the school's outdoor area in April 2022 and returned underspent grant in August 2023, as reported in last year's report and accounts. However, **the school returned £41.67 too much**, so the Adnams Community Trust repaid **£41.67** to Orford Primary School in October 2023.

Inspire Suffolk received a grant of £1,500 in October 2022 towards the cost of converting a storeroom at their base in Lowestoft into a confidential Wellbeing-Service Counselling Room. The work cost less than expected so the underspend of **£164.10** was returned in November 2023.

Alburgh Parish Council received a grant of £1,050 in April 2023 to replace rotten bollards and install a handrail down to the river Waveney. The work cost considerably less than anticipated so the **£609.07** underspend was returned.

Pulham Youth Engagement Project received a grant of **£1,666** in July 2023 to pay for holiday outings for youth club members. The grant was returned as the outings did not take place.

THE ADNAMS COMMUNITY TRUST APPLICATION GUIDELINES

The Adnams Community Trust

- 1 The Adnams Community Trust (charity no 1000203) was founded in 1990 to mark the centenary of Adnams as a company. It is funded by a percentage of Adnams plc's profits, Adnams dividends donated by shareholders, customer donations in Adnams shops and online, a 50p levy on portions of fish and chips sold in Adnams managed properties, general donations, legacies, and funds raised through events like the annual Adnams 10k Run.
- 2 The Adnams Community Trust is managed by a skilled board of Trustees, who run the Trust independently from Adnams plc. The Trustees are a mix of elected Adnams employees, Adnams directors and others whose expertise and commitment add to the quality of decision-making. All Trustees give their time freely, and no remuneration is paid.
- 3 The trustees publish independently examined accounts on an annual basis.

Who may/may not apply

- 4 Applications must be for charitable causes within a 25-mile radius of St Edmund's Church, Southwold. Applications from national charities which operate within the 25-mile catchment area may be considered if assurances can be given that the money will be used for a specific purpose, exclusively within the above catchment area/exclusively for the benefit of individuals from within our catchment area.
- 5 The Adnams Community Trust does not normally make grants to religious organisations or private clubs unless these can demonstrate that the purpose of the grant is for something of clear public benefit, accessible to all.
- 6 No grants are made to individuals. However, public bodies and charities may apply on behalf of individuals.

What grants are/are not made for

- 7 The Trustees prefer applications for specific items.
- 8 Grants are generally of a one-off nature.
- 9 There must be at least two years between grants to the same organisation.
- 10 The Trustees are reluctant to give grants to cover on-going running costs, although in very exceptional circumstances they may do so.
- 11 The Adnams Community Trust does not provide sponsorship of any kind.
- 12 The Adnams Community Trust does not provide raffle prizes.
- 13 The Adnams Community Trust does not give funds indirectly to charities, for example by sponsoring the fundraising efforts of individuals.
- 14 Grants are not awarded retrospectively (ie for items which have already been purchased).
- 15 The Adnams Community Trust does not award grants to Community Pubs or community Christmas light displays.

How to apply

- 16 The Trustees meet quarterly, in January, April, July and October. For application deadline dates or an application form please contact the Adnams Community Trust Administrator by emailing communitytrust@adnams.co.uk, telephoning 01502 727200 or by writing to Rebecca Abrahall, The Adnams Community Trust Administrator, The Adnams Community Trust, c/o 23 The Street, Brockdish, Norfolk, IP21 4JY.
- 17 When completing your application, please include the following information:
- what the grant is for
 - who will benefit
 - how much the item(s) will cost, including a detailed quotation
 - fundraising activities being undertaken and/or other grants applied for, and the amount raised so far
 - necessary supporting documents (see point 19)
- 18 If your organisation is VAT exempt, or is able to reclaim VAT, please ensure VAT is not included in your application.
- 19 Please include with your application:
- Most recent set of audited or examined accounts (if applicable) and management accounts for the most recent financial year
 - Planned budget for the coming year
 - Most recent bank statement(s) for all bank accounts and details of the number of people needed to authorise payments from the organisation's bank account(s)
 - Constitution
 - Reserve Policy
 - Safeguarding Policy/Procedures (if relevant)
- If your accounts show a significant surplus or deficit or high or low reserves, please provide an explanation.
- 20 Please note, if an application is successful the Trustees will expect the grant to be spent **within one year**. Copies of receipt(s) will be required as proof of purchase/expenditure and the End-of-Project Reporting Form must be completed and returned. **Items must not be purchased before the grant is awarded. Any changes to the use of the grant must be approved in writing in advance by the Adnams Community Trust.** The Trustees reserve the right to ask for a grant to be returned if these conditions are not met.

LEGAL AND ADMINISTRATIVE DETAILS

The Adnams Community Trust Bankers

Barclays Bank plc
Waveney Valley
Leicester
Leicestershire
LE87 2BB

The Adnams Community Trust Independent Examiners

van Dijk Accountants Limited
Georgian House
34 Thoroughfare
Halesworth
Suffolk
IP19 8AP

The Adnams Community Trust Solicitors

Nicholsons Solicitors
2 Quay View Business Park
Barnards Way
Lowestoft
NR32 2HD



**The Adnams Community Trust
Sole Bay Brewery
Southwold
Suffolk
IP18 6JW**

Registered charity number 1000203