



## REPORT & ACCOUNTS 2024-2025

### Chairman's Report

In the year 2024-2025 the Adnams Community Trust paid out 46 grants totalling **£54,743**. 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. Our thanks go to Nick Corke from Hour Community, Steve Falvey and David George from Bike Active North Suffolk, Maria Dobing and Caroline Henderson-Holmes from MORABE Rural Music and Jessica Jeans from SouthGen (The Old Hospital, Southwold).

Applications to the Adnams Community Trust have remained constant over the last year, demonstrating a continuing need within the Trust's catchment area. It has only been possible for the Trust to continue awarding grants thanks to the generosity of our wonderful customers, shareholders and others, and we are most grateful for this support.

Whilst Adnams plc strives to become a profitable business once more, able to donate a percentage of profits to the Adnams Community Trust, donations from shareholders, customers and others are vital in allowing the Trust to continue its work. If you do not already donate to the Adnams Community Trust and would like to make a one-off donation, set up a standing order, remember us in your will or mandate your dividends, please contact Rebecca Abrahall, the Adnams Community Trust Administrator, [communitytrust@adnams.co.uk](mailto:communitytrust@adnams.co.uk). Donations can also be made online through the Adnams Community Trust page on TotalGiving - <https://www.totalgiving.co.uk/charity/the-adnams-community-trust>. **Your full donation, and any Gift Aid we are able to claim, will go to help good causes, as all administrative and staffing costs for the Trust 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 2024-2025.

A handwritten signature in black ink, appearing to read 'Geoff Stevens', with a horizontal line drawn underneath it.

**Geoff Stevens**  
Chairman

**THE ADNAMS COMMUNITY TRUST**  
**RECEIPTS & PAYMENTS ACCOUNT 1 September 2024 TO 31 August 2025**  
These accounts have been prepared on a receipts and payments basis

2023/2024		2024/2025
£		£
<u>19,893</u>	Brought forward surplus	<u>32,293</u>
	<b><u>Income</u></b>	
0	Income from Adnams	0
0	Tax on Gift Aid and dividends	279
<u>2,439</u>	Returned grants	<u>846</u>
2,439		1,125
	<b><u>Donations</u></b>	
494	TotalGiving	314
0	Speaking Fees	0
0	Managed properties – fish & chips donations	24,466
40,525	Individual donations	535
5,561	Pennies	1,463
365	Fundraising	679
<u>2,951</u>	Donations re Adnams 10K run	<u>10,899</u>
49,896		38,356
	<b><u>Dividends</u></b>	
<u>177</u>	Shareholders	<u>177</u>
177		177
52,512	<b><u>Total income for the year</u></b>	39,658
<u>72,405</u>	<b><u>Total amount available for distribution</u></b>	<u>71,951</u>
	<b><u>Expenditure</u></b>	
<u>(40,112)</u>	Grants paid out during the year	<u>(54,743)</u>
(40,122)		(54,743)
	<b><u>Commitments</u></b>	
0	Previously committed	0
<u>(1,500)</u>	Commitments made this year	<u>(2,975)</u>
(1,500)		(2,975)
<u>30,793</u>	Carried forward to next year	<u>14,233</u>
	<b><u>Represented by</u></b>	
32,293	Bank balance	17,208
1,500	Less commitments	2,975
0	Less uncleared cheques	0
<u>30,793</u>	<b>Surplus carried forward</b>	<u>14,233</u>



16 October 2025

## 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 2025.

### 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
3. the accounts do not comply with the applicable requirements concerning the form and contents of accounts set out in the Charities (Accounts and Reports) Regulations 2008 other than any requirement that the accounts give a 'true and fair view' which is not a matter considered as part of an independent examination.

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

14 January 2026

# 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 Historically the primary sources of income have been from a percentage of the profits of Adnams plc and from dividends on Adnams shares (a mixture of legacy income and mandates from existing shareholders). Both are seriously impacted at present because the company has not been profitable for a number of years. Although annual income is currently lower than previous years, the Trust has been able to turn to other sources of income such as in-store donations by Adnams customers, profit from the Adnams 10k run and a levy of 50p on portions of fish and chips sold in Adnams managed properties.
- 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 and updated January 2025*

## **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 currently has ten trustees who bring with them a wealth of experience and knowledge:

- Geoff Stevens - Chair
- Diana Archer – Elected Employee Trustee
- Samantha Crocker – Elected Employee Trustee
- Juliet Grimes – Co-opted Trustee
- Jenny Hanlon – Director Trustee
- Andrew Heald – Director Trustee
- Melvyn Horn – Co-opted Trustee and former Adnams plc employee
- Simon Loftus OBE – Original Trustee
- Clare Teasdel – Co-opted Trustee
- Helen Williams – Elected Employee Trustee

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

**Farlingaye High School** in Woodbridge has 1,917 pupils. It has an outstanding PE department with PE clubs running every day throughout the school year, including volleyball. The trustees awarded a grant of **£1,500** towards the cost of new volleyball facilities. This grant was awarded in July 2024 but not paid until September 2024.

**Coldfair Green Primary School PTA** is run by teachers and parents for the benefit of the 149 pupils at the school, 13% of whom are in receipt of free school meals. The trustees awarded a grant of **£750** to purchase a shed to store equipment needed for fundraising events.

**The Friends of Wilby School** work with parents and staff to raise funds for the benefit of pupils. The school has 94 pupils, 12.7% of whom are in receipt of free school meals. The trustees awarded a grant of **£1,294.98** to purchase six laptops for use by pupils.

**The Broads Specialist Unit** is a new unit attached to Barnby and North Cove Primary School which will support 18 children aged between 8 and 11 with cognition and learning needs from across Suffolk. The trustees awarded a grant of **£1,000** to purchase items to create an 'outdoor continuous provision' area to give the children the best opportunities to progress.

**The Friends of Alburgh with Denton Primary School** raise funds to provide items for the benefit of the school's 106 pupils. The trustees awarded a grant of **£1,666.78** to purchase six iPads and cases.

**Red Oak Primary School PTA** raises funds for the benefit of the school's 435 pupils. The school is situated in the Kirkley area of Lowestoft, one of the most deprived wards in the country. The trustees awarded a grant of **£1,130** to pay for a trip to the local cinema for the school's 240 Key Stage Two pupils as a Christmas reward.

**Friends of Mendham Primary School** raise funds for the benefit of this rural school's 63 pupils, 28% of whom are eligible for Pupil Premium. The trustees awarded a grant of **£1,499.99** to purchase a new outdoor building for use by Early Years pupils.

**Friends of Ilketshall St Lawrence Primary School** raise funds to support the work of the school. The school is very rural with 101 pupils. The trustees awarded a grant of **£379.27** to purchase handheld microscopes, a butterfly life cycle kit, a frog life cycle kit, eight two-way bug viewers and ten bug pots for use in science lessons.

**Friends of St Mary's Primary School Woodbridge** organise events and raise funds for the benefit of the school's 185 pupils. The trustees awarded a grant of **£784.50** to purchase two room dividers to allow the school hall to be split into a separate area, for use by the breakfast and after-school clubs and as a dedicated Special Education Needs and Disabilities area during the day.

### Health & Social Welfare

**Eye Opportunity Group** provides support for children with a wide range of additional needs up to the age of five. The Group works with the children to equip them with the skills they need to transition to school. The trustees awarded a grant of **£1,000** towards the cost of converting the current toilets to a baby-change area.

**Halesworth Volunteers** provide support for older and vulnerable people in Halesworth and the surrounding area. It works with the Blyth Valley Team Ministry to run the Halesworth Community Larder, a welcoming space, open to all, where people can donate or swap food, or receive food if they are in need, free of charge and with no questions asked. The trustees awarded a grant of **£2,415** to purchase a large cooker, cooking pans and trays.

**Bike Active North Suffolk** is a new organisation set up to provide adults with disabilities (physical or mental) or those lacking confidence or strength with a safe cycling experience on traffic-free cycle paths or quiet lanes on specially adapted bikes or e-bikes. The trustees awarded a grant of **£1,000** towards the cost of a second-hand ISO storage container.

**My Life** runs a project entitled 'Unlock my life' which delivers bespoke mental-health and well-being-awareness training in prisons. The aim of the project is to educate prisoners on how the brain processes stimuli which lead to thoughts, actions and behaviour which subsequently result in people being sent to prison. After training, participants can volunteer as mental-health ambassadors, providing peer-to-peer support. The trustees awarded a grant of **£2,500** to purchase furniture for an office at Hollesley Bay Prison from where My Life will run drop-in sessions for prisoners experiencing mental-health issues and offer support and advice on anything else affecting their wellbeing.

**Make Them Smile** is a national charity which provides tailored support to improve the quality of life for children and young people with disabilities, life-limiting conditions and complex needs. The trustees awarded a grant of **£2,000** towards the cost of a specialist chair for a four-year-old boy from Lowestoft. The chair will improve his quality of life, enabling him to sit in comfort and interact with his family.

**The Befriending Scheme** runs groups and activities for people aged over 16 with learning disabilities. Sessions in Lowestoft run every Friday from 10 until 3 and are attended by 15 people aged between 30 and 90. The trustees awarded a grant of **£319.51** to pay for an entertainer, board games and craft materials for the group.

**Swell Music CIC** is a not-for-profit arts organisation which delivers singing workshops across east Suffolk. Swell runs a project, 'Singing for lung health', in Reydon for 20 people living with life-limiting lung conditions. Attendees learn breathing exercises, movement, mindfulness and singing, all of which give them the tools to manage their breathlessness, having a positive effect on physical and mental health. The trustees awarded a grant of **£1,550** to pay for ten sessions in Reydon.

**Bike Active Norfolk** is a volunteer-run charity which provides cycling experiences for adults and children with a disability, injury or who are recovering from illness. The trustees awarded a grant of **£2,500** towards the cost of cycle-maintenance training courses for three volunteers so that the group can maintain its cycling equipment.

**Music in our bones** runs free health and well-being singing groups for family carers and people living with illness such as Parkinson's and dementia, or those with mental-health issues. Attendance at the sessions reduces social isolation, boosts mood and self-confidence, and improves posture and breathing. The trustees awarded a grant of **£1,950** to pay for ten sessions of the monthly HeartSong singing group in Oulton Broad.

**Catalyst Counselling CIC** provides high-quality counselling and well-being workshops for people living in Lowestoft, Waveney and Great Yarmouth who would not otherwise be able to afford counselling. Typically, clients have issues with loss, depression, anxiety, relationships, eating disorders, post-traumatic stress and self-harming. The trustees awarded a grant of **£1,000** to subsidise counselling sessions for those in need.



**The PBC Foundation** provides support and information to those affected by Primary Biliary Cholangitis, a progressive autoimmune liver condition, with no known cause or cure. The trustees awarded a grant of **£556.80** to pay for copies of 'The Bear Facts', a publication which provides information on the disease, for 29 sufferers from within 25 miles of Southwold.

**Reflect Productions Great Yarmouth CIC** uses drama and creative arts to support mental health, well-being and social inclusion. Activities are open to over 18s from the Great Yarmouth area, particularly those experiencing depression, anxiety, addiction, social isolation or trauma. The trustees awarded a grant of **£895** to pay for materials for 'Next Stage', community drop-in theatre sessions for adults with mental-health issues.

**Status Creative CIC** carries out creative activities to improve wellbeing and provide opportunities for creative expression. It runs workshops for marginalised communities, and for people with mental-health issues or disabilities, or who are recovering from addiction, experiencing poverty, isolation or domestic abuse. The trustees awarded a grant of **£2,500** to pay for workshops in music composition, singing, drumming and creative writing for clients of Christies Care in Saxmundham who have disabilities and/or poor mental health.

## The Arts

**INK** is a theatre company based in Halesworth and is the UK's largest producer of new short plays. The trustees awarded a grant of **£1,050** to pay for a creative workshop in Halesworth for young writers and performers aged 12 to 16 years during the 2025 Easter holidays.

## Recreation

**Pulham's Youth Engagement Project** is a volunteer-run not-for-profit organisation which offers youth activities and a safe space for Year Six pupils from the Pulhams and surrounding villages. The trustees awarded a grant of **£1,000** towards either hall fees for 2025 or the purchase of musical instruments.

**Bedfield & Monk Soham Tennis Club** has a growing membership, and holiday and after-school coaching sessions are offered for junior players. The tennis court was built in 1982 for the benefit of local residents and has been well used but now needs to be resurfaced. The trustees awarded a grant of **£1,000** towards the cost of resurfacing the court.

**Halesworth Dolphins Swimming Club**, based at Bungay swimming pool, offers Learn to Swim, Development and Masters sessions for children and adults. The trustees awarded a grant of **£963.56** to purchase Nabaiji Fins, used in training sessions.

**1st Bungay Sea Scouts** gives its 72 members the opportunity to learn many new skills and make new friends. The trustees awarded a grant of **£837.98** to purchase two fridges and two trolleys for use on camping trips.

**1st Halesworth Scout Group** has 68 members, male and female, aged between 6 and 25, who attend Beavers, Cubs, Scouts or Explorers. The trustees awarded a grant of **£1,055.83** to purchase lightweight foldable benches for use at camps, and a gas storage basket for gas canisters at HQ.

## Buildings/Community Facilities

**Scole Parish Hub CIO** was set up to bring about a new parish hall for the village. The new hall will use around 50% of the site, the rest being grass and woodland. The trustees awarded a grant of **£1,080** to purchase six benches so that parishioners can make use of the site now, whilst funds are raised to build the hall.

**Mettingham Village Hall** is well used for a wide variety of activities - baby sign language, bridge club, yoga, art groups, local bands and community lunches. The trustees awarded a grant of **£1,495** to cover the funding shortfall to redecorate the food preparation and food consumption areas.

**Limpenhoe Village Hall** is the only community facility in this rural village. It is used for social, recreational and educational activities, including a monthly Breakfast Café. The trustees awarded a grant of **£364.95** to purchase five parasols for the hall's picnic tables.

**Worlingham Community Hall** is a new village hall, completed in the summer of 2025. The trustees awarded a grant of **£1,000** towards the cost of a hearing loop which will help to ensure the new hall is as inclusive and accessible as possible.

**Southwold Allotment Holders Association** was established 75 years ago to provide the local community with an allotment-gardening resource. Plotholders are a mix of older people and families with young children. The allotments improve physical and mental health and increase the social interaction of members and their families. The trustees awarded a grant of **£1,995** to pay for the urinal aspect of an off-grid toilet with disabled access.

**Seething and Mundham Village Hall** is well used for private and community events, clubs, classes, as a polling station and as a refreshment venue for marriages and funerals. The trustees awarded a grant of **£1,381** towards the cost of roof repairs.

**Kessingland Men's Shed** aims to prevent social exclusion and loneliness by providing opportunities for people over the age of 18 to meet whilst carrying out DIY tasks and creative projects in a safe environment. The trustees awarded a grant of **£1,000** towards the cost of a new roof.

**Strumpshaw Parish Council** represents a rural community of 700 residents and is responsible for the village's amenities. The trustees awarded a grant of **£700** as match funding towards the cost of reinstating a former trod (a type of footpath).

**The Rifle Hall**, Halesworth, is a listed building used by residents from Halesworth and the surrounding villages. The Hall regularly hosts keep-fit classes, ballroom dancing classes, Slimming World sessions, table tennis, Pilates, the WI, a gardening group, curling, a monthly produce market as well as private events. The trustees awarded a grant of **£1,818.90** to meet the funding shortfall for repairs to the hall's entrance.

**Metfield Stores CIC Co-operative** is the only shop serving a wide area between Harleston and Halesworth. The village has no bus service, making the shop invaluable to those without transport. The shop is staffed by 30 volunteers and acts as a community hub. The trustees awarded a grant of **£1,078** to purchase a double-door display cooler which will be more efficient and reliable.

**Homersfield Parochial Church Council** is responsible for looking after St Mary's Church Homersfield and the churchyard, which has an old and new section. The churchyard is well used by visitors and the local community, including for events such as community picnics - the village does not have a village hall. The trustees awarded a grant of **£1,000** towards the cost of repairs to the flint wall which separates the old and new churchyards.

**Holton Pits CIC** is run by a small volunteer committee. The site is maintained by volunteers and used by local residents, holidaymakers, school children, a Forest School and anglers. The trustees awarded a grant of **£600** to purchase two rustic wooden benches to be made by Street Forge Workshops in Thornham, an organisation which provides activities for adults with disabilities or learning difficulties.

**Fortrey Heap Village Hall** is a meeting place for the residents of North Cove and Barnby. It is well used by numerous groups and classes and for village events. The trustees awarded a grant of **£1,200** to purchase tables and chairs.

**Bungay Allotment and Gardens Association** is run by volunteers for the local community on a site owned by Bungay Town Council. Plotolders range in age and there is a community plot which is used by the local school and locals with additional needs. The trustees awarded a grant of **£1,929.75** to purchase the materials and hire the equipment needed to improve the site's water system.

**Sole Bay Men's Shed** in Southwold is a newly formed organisation open to anyone aged 18 or over. The Shed aims to encourage people to come together to make, repair and repurpose items whilst reducing loneliness and improving wellbeing. The trustees awarded a grant of **£680** to purchase a wood planer.

**Acle Parish Council** is replacing a community building currently used by the pre-school, Beavers and Scouts with a new community facility with two rooms and a kitchen. The trustees awarded a grant of **£390.40** to purchase a fridge and an electric cooker.

## Environment/Conservation

**Langley with Hardley Parish Council** works for the benefit of residents of the two villages and visitors to the area. The trustees awarded a grant of **£250** to purchase bulbs and wildflower seeds to be planted and sown by villagers along the roadside as part of a village clean-up.

**Gunton Woodland Community Project** is a group of 25 to 30 volunteers aged between 60 and 91 who work on a weekly basis to maintain Gunton Wood. The volunteers fell trees where needed and create woodchip paths so that the woodland is accessible to people with wheelchairs and mobility scooters. The wood is open to the public and is frequently visited by local schools. The trustees awarded a grant of **£1,000** towards the cost of a second-hand ride-on mower/tractor. This will be used with a trailer to transport wood chippings through the wood.

## Returned Grants

In October 2023 the trustees awarded a grant of £200 to **Creative Collisions** to purchase art materials. There was an underspend of **£95.60** which Creative Collisions returned in November 2024.

In January 2023 the trustees awarded **Middleton Village Hall** a grant of £850 to replace some concrete at the entrance to the hall. It was subsequently decided that it was not necessary to replace as much concrete, so the **£750** underspend was returned.

# 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. The Trust is funded by a percentage of the profits of Adnams plc, Adnams' dividends donated by shareholders, customer donations in store and online, a 50p levy on portions of fish & chips in Adnams-managed properties, profits from the Adnams 10K run, general donations and legacies.
- 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.
- 7 The Adnams Community Trust is keen to support educational establishments but prefers these applications to be submitted by 'Friends of' or Parent Teacher Associations. However, if an educational establishment does not have a Friends group or Parent and Teacher Association, we shall always be willing to consider other applications on their merits.

## What grants are/are not made for

- 8 The Trustees prefer applications for specific items.
- 9 Grants are generally of a one-off nature.
- 10 There must be at least two years between grants to the same organisation.
- 11 The Trustees are reluctant to give grants to cover on-going running costs, although in very exceptional circumstances they may do so.
- 12 The Adnams Community Trust does not provide sponsorship of any kind.
- 13 The Adnams Community Trust does not provide raffle prizes.

- 14 The Adnams Community Trust does not give funds indirectly to charities, for example by sponsoring the fundraising efforts of individuals.
- 15 The Adnams Community Trust does not award grants to Community Pubs or community Christmas light displays.
- 16 Grants are not awarded retrospectively (ie for items which have already been purchased).

### How to apply

- 17 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](mailto:communitytrust@adnams.co.uk), or by writing to Rebecca Abrahall, The Adnams Community Trust Administrator, The Adnams Community Trust, c/o 23 The Street, Brockdish, Norfolk, IP21 4JY.
- 18 When completing your application, please include the following information:
  - what the grant is for
  - who will benefit and how
  - 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 20)
- 19 If your organisation is VAT exempt, or is able to reclaim VAT, please ensure VAT is not included in your application.
- 20 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, high or low reserves, please provide an explanation.

- 21 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