

St Anthony's Trust Limited

Grant Making Policy

Change Record

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St Anthony's Trust Limited

1. Welcome

St. Anthony's Trust Limited is the landlord of Tablehurst and Plaw Hatch Community Farms in Forest Row. We strive to protect the lands where Tablehurst and Plaw Hatch Community Farms are situated to ensure that biodynamic, community-owned agriculture in Forest Row is safeguarded for generations to come.

Our main objects are the advancement of education (with particular regard to the principles and methods based on the writings and lectures of Rudolf Steiner). In particular (but not exclusively), by establishing and running agricultural and horticultural training centres based on biodynamic agricultural principles. In addition, the trust strives to support those in need due to age, disability, financial or other hardship, and other charitable purposes as the Trustees shall think fit.

To this end, St. Anthony's Trust Limited owns Old Plaw Hatch Farm and Tablehurst Farm and leases them to the farms to operate as biodynamic agricultural farms and training centres.

We receive no funding and depend wholly on gifts and legacies for our ongoing work.

Transparency is a core value underpinning our operations, ensuring that every financial transaction is conducted with integrity and accountability. By verifying the legitimacy of our funding sources, we aim to maintain the trust of our stakeholders and ethical standards in all aspects of our work.

To shape this policy, we have followed the guidance from the Charity Commission (specific guidelines in "It's your decision: Charity trustees and decision-making" and "Compliance Toolkit: Protecting Charities from Harm - Chapter 2: Due diligence, monitoring and verifying the end use of charitable funds").

This policy highlights our dedication to transparency and responsible financial management. By adhering to it, we aim to create a secure and trusting environment for everyone working with us or supporting our work.

St Anthony's Trust Limited Limited

2. Introduction

- a. This policy aims to establish guidelines for providing grants to the farms within our jurisdiction and partnering organisations.
- b. This policy aims to ensure transparency and accountability in all financial activities whilst adhering to legal requirements, preventing money laundering, and upholding the organisation's reputation and integrity.
- c. This policy applies to all employees, volunteers, trustees, and other individuals associated with the organisation.
- d. This policy encompasses all categories of grants offered by St. Anthony's Trust Limited.
- e. St. Anthony's Trust Limited will provide the following grant types: Apprenticeship Grants, Training Grants, and Capital Grants for improving the Infrastructure of the farms renting our lands. Detailed descriptions, beneficiary information, eligibility criteria, and reporting requirements can be found within this policy document.
- f. Support for the farms on our lands: St. Anthony's Trust Limited will continue to provide financial support to these farms to enhance the farms' infrastructure (that sustains Biodynamic education) and supporting Biodynamic education or providing a grant to cover (fully or partially) the living expenses of Biodynamic farmer apprentices to enable them to undertake their training. Financial support will be offered subject to applications.
- g. Grants will be disbursed as one-time payments for specific projects, payments after project completion, or as monthly instalments, subject to evaluation by the trustees in each case.
- h. Trustees retain the authority to establish a maximum grant amount, considering available funds and specific evaluation criteria.
- i. Monitoring: Our trustees are committed to ensuring that the grants we award reach their intended destinations and are utilised according to the Trust's charitable objectives.
- j. Grants will only be provided to support projects aligned with St. Anthony's Trust Limited objectives.
- k. Our trustees are responsible for overseeing funds and ensuring their directed application towards intended projects.
- l. Due diligence: Our trustees are required to know individuals and organisations collaborating with us and will identify and manage associated risks before disbursing funds.
- m. The Trust holds the right to vet individuals and organisations seeking grants.
- n. St. Anthony's Trust Limited will mandate financial records from all applying organisations and individuals seeking grants.

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3. APPRENTICE LIVING COSTS GRANT

St. Anthony's Trust Limited strives to offer apprentice grants to advance Biodynamic farmers' education.

3.1 Beneficiaries:

Individuals wishing to train as Biodynamic farmers, receiving practical training in Tablehurst Farm, Old Plawhatch Farm or other Biodynamic farms that partner with us (conditions for working as partners are listed in point 8 of this policy)

3.2 Criteria of selection:

- a. Tablehurst Farm and Old Plawhatch Farm work regularly with Biodynamic farming apprentices. They may apply for a grant to cover the apprenticeship living costs fully or partially.
- b. Applications should be made in writing for the trustees to evaluate.
- c. Applications should detail the number of apprentices that require funding, the length of the apprenticeship programme and the associated costs.
- d. The trustees will evaluate the application, carefully assess the Trust's income (rents, legacies, grants), reserves and foreseen expenditure, and decide whether to offer a grant to cover the cost of living in full or partially.
- e. Trustees will also decide whether to offer the grant as a one-off payment or in instalments.
- f. Due diligence will include evaluating the applicant's (the farm applying for a grant) financial situation, their capacity to train an apprentice for the advertised period, etc.
- g. Each farm will choose the apprentice using select criteria, which includes ascertaining whether the candidate has the necessary attributes to complement the farm team and a strong wish to uphold the values required to live within the farm's on-site community. Experience in biodynamics isn't crucial, but an interest in it is. If the candidate has yet to gain experience in farming, the farm may ask them to volunteer for three to six months before committing to the apprenticeship. The candidate must be able to manage this very physical work. The candidate must be able to commit for the whole duration of the apprenticeship.
- h. St. Anthony's Trust Limited requires the farm to advertise the position and exercise appropriate HR protocols. The Trust will require regular updates until the applicant is selected, in addition to a report detailing the rationale and suitability behind the decision.

3.3 Report back / Monitoring

- a. The Trust requires an immediate update (within seven days) if an apprentice leaves their position before the agreed completion date. In this case, the Trust has the right to stop the monthly payments until a new apprentice is found. If the apprentice grant has been offered in one payment, the farm must ensure that a new apprentice is hired (following the

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application process set out above) and receives the remaining funding or that the funds are refunded to St. Anthony's Trust Limited.

b. St. Anthony's Trust Limited requires an annual report that accounts for the apprentice's progress in their training. Full details of the report are detailed in point 9 of this policy.

3.4 Promote the Trust's activities to the beneficiaries:

a. The Trust will advertise the apprentice programme on its website. The trustees will present it when participating in events and talks. The farms regularly promote their work through newsletters.

4. EDUCATION GRANTS

St. Anthony's Trust Limited can offer funds to partner organisations aiming to support the advancement of education (with particular regard to the principles and methods based on the writings and lectures of Rudolf Steiner).

4.1 Beneficiaries:

Individuals wishing to receive education, mainly based on the principles of Rudolf Steiner and in Biodynamic farming, in an organisation that the Trust is partnering with.

4.2 Partner Organisations

a. St. Anthony's Trust Limited's criteria for partnering with entities providing education is detailed in point 9.

4.3 Criteria for student selection:

a. A partner organisation (defined in point 8) can apply for a grant to cover students' training costs fully or partially.

b. Applications should be made in writing for the trustees to evaluate.

c. Applications should detail the number of students that require funding, the length of the training and the associated costs.

d. The trustees will evaluate the application, carefully assess the Trust's income (rents, legacies, grants), reserves and foreseen expenditure, and decide whether to offer a grant to cover the training in full or partially.

e. Trustees will also decide whether to offer the grant in one payment or instalments.

f. Due diligence will include evaluating the organisations' (applying for a grant) financial situation, capacity, and idoneous quality to offer the advertised course.

g. Each organisation will choose the students using their criteria.

The candidate must be able to commit for the entire duration of the course.

h. St. Anthony's Trust Limited will require the organisations to provide the list of candidates who applied for a grant, a report explaining why the student was chosen, the selection criteria and any other information the trustees deem relevant.

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4.4 Report back: / Monitoring

- a. The Trust requires an immediate update (within seven days) if a student leaves their course before completing it. In this case, the Trust has the right to stop the monthly payments until a new student is in place to receive the grant (following the application process explained above). If the grant has been offered in one payment, the Trust will ensure that a new student receives the remaining grant amount or that the funds are refunded to St. Anthony's Trust Limited.
- b. St. Anthony's Trust Limited will require an annual report that accounts for the student's progress. Full details of the report are set out in point 9 of this policy.

4.5 Promote the Trust's activities to the beneficiaries:

- a. The Trust will advertise the training programme on its website. The trustees will present it when participating in events and talks. The farms regularly promote their work through newsletters.
- b. Trustees will require the organisation to provide a photo of the trainee and a description of the education they are receiving.

5. CAPITAL GRANTS

The Trust can offer Capital Grants to the farms to improve infrastructure. The final object is the advancement of Biodynamic farming education by improving the agricultural and horticultural Training Centres based on biodynamic agricultural principles.

5.1 Beneficiaries:

The end beneficiaries are those individuals training as Biodynamic farmers, working and training as farm apprentices; the community by having access to Biodynamically grown food, a place to visit, taking workshops related to Biodynamic food growing and processing; and those visiting and joining farm activities.

5.2 Criteria:

- a. St. Anthony's Trust Limited can offer the farms funds to improve infrastructure based on application.
- b. Applications must be made in writing for the trustees to evaluate.
- c. Applications should explain the project, all the associated costs and the benefits it would bring to the farm, the Trust's assets, and the public.
- d. The trustees will evaluate the application, carefully assess the Trust's income (rents, legacies, grants), reserves and foreseen expenditure, and decide whether to offer a grant to cover the costs in full or partially.
- e. Trustees will also choose to offer the grant in one payment or instalments.

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f. Due diligence checks will include evaluating the applicant's (the farm applying for a grant) financial situation and their capacity to complete the project and use the funds as they intended.

5.3 Report back on end use: / Monitoring

- a. Trustees will require a schedule of works and regular reports of the advancement of the project.
- b. A report of completion will be requested at the end of the project.
- c. Trustees can offer a single payment or pay in instalments upon completion of partial works and ask for the invoices to prove payments to suppliers before transferring funds.
- d. The Trust will stop payments in the event of the interruption of a project.
- e. If the grant is made in full before the project ends, the Trust must still follow up on the progress of the works until it is completed.
- f. The Trust may require a full grant reimbursement if the project isn't completed within the agreed time frame and there's no notice of an extension or delay.
- g. The Trust will require an annual report detailing the end use of the grant (explained in point 9 of this policy).

5.4 Promote the Trust's activities to the beneficiaries:

The granted project will be advertised on the Trust's website.

6. How to apply

- a. The farms or other partner organisations should send simple written applications to admin@saintanthonysTrust.com
- b. Organisations willing to work with St. Anthony's Trust Limited should contact admin@saintanthonysTrust.com
- c. Individuals wishing to apply for apprenticeship positions should contact Carolyn at Tablehurst Farm, carolyn.emsley@tablehurstfarm.org.uk or Rebecca at Plawhatch Farm, Rebecca@plawhatchfarm.co.uk for further details.
- d. St. Anthony's Trust Limited does not offer grants directly to individuals. Our work is through the farms or partner organisations.

7. Beneficiary selection criteria

- a. Criteria of selection are explained above in points 3.2, 4.3, 5.2, and 6.2.
- b. The criteria for partnering with organisations are explained in point 8.
- c. The Trust will always require financial records of the organisations applying for grants.
- d. Trustees will audit the end use of the grant for the direct beneficiaries.

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8. Working with partners

- a. The trustees will evaluate partnering with training organisations provided that:
- 1 - They are in line with the Trust's objectives: the advancement of education (with particular regard to the principles and methods based on the writings and lectures of Rudolf Steiner). In particular (but not exclusively), by establishing and running agricultural and horticultural training centres based on biodynamic agricultural principles
 - 2- The partnering is committed to supporting education with the above mentioned particulars.
- b. When working with partners, trustees will carry out appropriate and proper due diligence, performing checks to ensure that those potential partners are suitable and appropriate for working with us.
- c. A partnership agreement will be written and signed. This agreement will specify the working relationship with the partner, the charity, and the partner's goals, aims and ways of working.
- c. Entering into the arrangement must be in advancement of the charity's purposes. Trustees must ensure that the partner can deliver the proposed activities or services and has appropriate control systems in place.

9. Monitoring

- a. The Trust will follow the progress of apprentices and trainees as indicated in points 3.3 and 4.4 of this policy. Infrastructure projects will be monitored as detailed in point 5.3 of this policy.
- b. St. Anthony's Trust Limited requires the farms and partner organisations to submit an annual report containing a brief recapitulation of the year's main activities related to Biodynamics and farming, apprentices training, courses offered to the public, open days, school visits, etc.
- c. The information in the report will be part of the trustees' report, which is submitted annually to the Charity Commission as part of the Year-End Accounts.

9.1 Apprentice training and Biodynamic training report

When the farms host apprentices or a partner organisation receives a grant for Biodynamic training, the annual report must contain the following information regarding apprentices:

- Apprentice/student name, start and end date of the training agreed, hours of work (if applicable).
- Area of training (farm, butcher, garden) or other studies
- Mentoring: agreed schedule of mentoring, key staff responsible for supporting/mentoring the apprentice/student
- What kind of support is offered with the training (i.e., groundwork, assignments, paperwork, etc.) and how this is delivered
- How the training is regularly reflected on/evaluated

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- Overall evaluation and development outcome
- What are the student's intentions after finishing the apprenticeship or the course?
- For apprentices only:
 - Does the apprentice participate in additional courses/workshops?
 - Costs of maintaining an apprenticeship: salary, food, lodging, training hours.
 - Groundwork: which areas did the apprentice work in?

9.2 Infrastructure Report

When receiving Capital grants for infrastructure works, the annual report should include a brief description of the project, its start and end dates (or estimated end if it is in progress) and the benefits it would bring to the farm, the Trust's assets, and the public.

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Annexe 1 -

Form to be completed by organisations applying for grants

1 - Please complete the following information for all types of applications.

Name:

Organisation:

Description of the petition:

Type of grant requested

- ☐ Apprentice living costs grant
- ☐ Education grant
- ☐ Capital grant
- ☐ Other

Attachments:

- ☐ Organisation's financial records:
 - ☐ Year-end accounts
 - ☐ Other documentation

Details of the documentation:

- ☐ Apprenticeship prospectus
- ☐ Training / Course Syllabus
- ☐ Applicant's names and criteria of selection

Note: If you apply from an organisation that is still not St. Anthony's Trust Limited partner, please send us a written application to become a partner.

2- Please complete only the information related to the type of grant you are applying for:

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2.1 APPRENTICE LIVING COSTS GRANT

Number of apprentices required:

Area of training:

Length of apprenticeship programme:

Costs related to the apprenticeship programme per person:

Detail of the costs per person (salary, food, lodging, training hours, etc):

Total costs per person:

Total costs:

Start and end dates of the programme (is decided)

Hours of work per week:

Hours of study per week:

Has the position been advertised?

Where?

Criteria of selection:

- ☐ The candidate has the necessary attributes to complement the farm team
- ☐ Uphold the values required to live within the farm's on-site community.
- ☐ Able to commit for the whole duration of the apprenticeship.

Experience in biodynamic

- ☐ Yes
- ☐ No

Interest in biodynamic

- ☐ Yes
- ☐ No

Experience in farming

- ☐ Yes
- ☐ No

If not, will the candidate volunteer before committing to the apprenticeship?

- ☐ Yes - Please detail the length of the volunteering time
- ☐ No

Other (please describe)

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If the appendices have already been chosen, please complete the questions below:

Name of the applicant(s)

Rationale for selection (if different from described above):

Training prospectus

Please attach the training prospectus detailing

- Start and end date of the training (if agreed), and hours of work and study.
- Area of training (farm, butcher, garden)
- Mentoring: agreed schedule of mentoring, key staff responsible for supporting/mentoring the apprentice
- What kind of support is offered with the training (i.e., groundwork, assignments, paperwork, etc.) and how this is delivered
- How the training is regularly reflected on/evaluated
- Methodology for evaluation and development outcome

Annual report

The trust will require an annual report for each apprentice that details, for each apprentice:

- Name and area of study
- Report progress in each field and an overall evaluation and development outcome.
- How the evaluation was conducted
- What are the apprentice's intentions after finishing the training?
- Did the apprentice participate in additional courses/workshops?
- The overall cost of the training

2.2 EDUCATION GRANTS

Name of the course:

Training subject:

Length of the training:

Start and end dates of the training (if decided)

Place of training (institution's name and address):

Number of students that require funding:

Detail of the costs per person:

Total cost per person:

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Total cost:

Criteria of selection

If the students have already been chosen, please complete the questions below:

Name of the applicant(s)

Rationale for selection (if different from described above):

Can the candidate commit to the entire duration of the course?

Training prospectus

Please attach the training prospectus detailing

- Start and end date of the training (if agreed), and hours of study.
- Mentoring: agreed schedule of mentoring
- How the training is regularly reflected on/evaluated
- Methodology for evaluation and development outcome

Annual report

The trust will require an annual report for each student that details

- Report progress and an overall evaluation and development outcome.
- What are the student's intentions after finishing the course?

2.3 CAPITAL GRANTS

Applicant name:

Project:

Requested funds:

Benefits expected from the project:

Monitoring

Once the grant is approved, the trust will require a schedule of works, a report of completion and a claim report.

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3 - To be completed by trustees:

Grant amount:

Payment option:

- ☐ One-time payment in advance
- ☐ One-time payment after project completion
- ☐ Monthly instalments

Criteria of evaluation: