



St Austell Brewery Charitable Trust

How to make a request

Individuals

- Detailed email or letter giving background on person(s) behind request, illnesses/diagnosis, reason/need for the request and costs involved (if equipment will need quote or proforma invoice as money, if agreed, is always paid direct to supplier)
- A support worker must not make a request on behalf of any recipient, all contact must be from the family concerned. They can only provide confirmation background
- Supporting letter which can be from a doctor, therapist, support worker, etc. This will need to confirm the condition and the need for the request
- If equipment or work is required, a quote or proforma invoice will be needed from the supplier as money is always paid direct, if agreed

Groups/Charities

- Detailed email or letter on headed/branded document giving background, support provided and who is assisted, reason for the request, costs involved and whether a donation or fixed amount is requested
- Annual accounts are always useful giving a full breakdown of the applicant's activities and outgoings

Process

- When all documents have been received, they are scanned and saved and filed ready for the next meeting
- Each request is summarised and added to the Summary of Requests which is then forwarded to the Committee prior to and ready for the meeting
- Donations Committee can commit to a maximum of £5,000. Anything higher than this sum, must go to the Trustees for consideration
- After the meeting and depending on the result – if yes, they are contacted by phone wherever possible or by whichever means they initially contacted us and advise of the outcome. If no, they are contacted by whichever means they initially contacted us.
- Once contacted, cheques are raised as payees are confirmed and then issued once two signatures have been received

General

- Key points to consider – is it life changing, is it life enhancing and does it make life easier?
- No organisation can make a request on behalf of any individual, it must come from the individual, unless it is a charity buying equipment on their behalf. The organisation can initially ask about contact and then let the individual know what to do next
- If money has already been donated, need details of the amount outstanding
- Money can be pledged, if the amount being raised is substantial and cheques will be issued once the full amount has been reached. If the amount to raise takes longer than 6 months, contact must be maintained with the recipient for progress
- Items purchased before any meeting will not be reimbursed without proof of purchase or receipt. It is strongly recommended that all applicants are advised not to purchase anything until the meeting has been held and a decision has been made
- All requests have 6 months from initial application to decision made, they can be kept 'active' by retaining contact with the applicant for updates. Anything beyond this becomes null and void and would mean a new request would have to be obtained
- Any change to a request, such as a change of equipment or increase in cost, becomes a new request. A reduction in cost is not an issue if more money was agreed initially
- Photographs of documents will not suffice – photocopies or originals must be submitted
- Online purchases cannot be made due to the limitations with the Trust bank account. This may change in the future but any requests requiring purchasing must come from a supplier

Possible No's

This is a 'grey area' as no request is deemed a 'no' immediately and all requests are put to the Committee, no matter what the request is. This provides clarity for auditors and creates a trail of responses whether positive or negative:

- Animal groups – shelters, rescue centres
- Schools – unless directly affecting SENs such as computer or sensory equipment but not general classroom upgrades
- Youth Groups/Clubs – under the legal age of consumption of alcohol such as scout groups, etc.
- Sponsorship – only employees are 'sponsored' to take part in runs, etc.
- Sponsorship/branding – any request that includes using logos, etc. as part of the request, would be a Marketing query and not a Charitable Trust query
- Holidays – are a luxury for anyone whereas respite care breaks can be considered
- Any request where the donation is for 'running costs', etc. as this is not person or equipment specific
- Geography – Any charity and individual request outside of our heartland. However, if a national charity has a SW branch for SW needs this will be considered.

Contact: trust@staustellbrewery.co.uk

