

The BRELMS Trust

Mary Cornish – Chair of Trustees
Rachel Boggs – Trust Administrator

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trust

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Overview

- 2007 - founded as a Charitable Trust
- 2014 - conversion to CIO
- £6.8m total awarded in grants to date
- Expendable endowment of £2.8m (2014: £1.96)
 - Invested with a strong focus on SRI
- 2014-2024
 - Annual donations and investment income: £5.07m, avg £461k pa
 - Grants: £4.85m, avg £432k pa

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Broad Objects

- the alleviation of poverty;
- the preservation and protection of health, and the advancement of health education and training in particular but not exclusively amongst groups in the community who are in need by reason of youth, age, ill-health, disability, financial hardship or other disadvantage;
- the development of the capacity and skills of the members of socially and economically disadvantaged communities in such a way that they are better able to identify and help meet their needs and to participate more fully in society;
- the advancement of education, the arts, and amateur sport by supporting community-based projects;
- the conservation, protection and improvement of the physical and natural environment;

The logo for 'the breims trust' is located in the bottom right corner of the slide. It features the words 'the', 'breims', and 'trust' stacked vertically in a green, sans-serif font. The 'e' in 'breims' is stylized with a vertical line through it.

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Funding Criteria

- Registered charities
- Income < £300k
- Based in Yorkshire and directly benefitting Yorkshire communities.
- Priority given to charities working at the heart of communities to tackle disadvantage and to provide sustainable benefit to the community.

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Funding

- Project costs (restricted) or core-costs (i.e. unrestricted)
- One-off or multi-year up to 3 years
- £6,000 pa, £18,000 in total
- 'Fallow' year before re-application to ensure don't become too reliant

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Some stats

	2021	2022	2023	2024
Applications	98	113	113	110
Number funded	30	42	45	45
Value	£370k	£494k	£392k	£625k
One-off	17%	34%	29%	24%
Multi-year	83%	66%	71%	76%

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Assessment process

- Application
 - Online form
 - Charity Commission summary
 - Annual accounts
 - Project budget
 - plus look at website, Facebook etc
- Initial review to weed out any that are ineligible
- All trustees review application and form an opinion (traffic light: R, A or G)
- Discussion and final decision at QTM

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Monitoring & Evaluation process

- Annual M&E report
- Visit after first year if total £12k or more
 - 2 trustees
 - Must recommend payment of next tranche
 - May request further information, impose conditions or reject!
- Ongoing relationship
 - Encourage grantee to contact us if things are not going to plan
 - May request change of use of funds

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Financial implications

- Full value of grants awarded shown in the year.
- Accounts system: 'bills' dated at the meeting date with due dates on anniversary of first payment
- Annual accounts: show creditors due within one year and after one year
- Quarterly meeting: check sufficient funds for renewals due in next 3-6 months plus new one-off/Year 1 grants .
- Request release of funds from endowment to unrestricted.

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