

DISS SURVEYORS' ALLOTMENT CHARITY

Please ask for: Sarah Villafuerte-Richards
Date: 23 July 2026

Dear Trustee,

You are hereby requested and required to attend the **Annual Meeting of the Trustees** of the **Diss Surveyors Allotment Charity**, which will be held in the **Council Chamber** at **Diss Corn Hall** on **Wednesday 29th July 2026** at **6.45pm** to consider the business detailed below.

Yours sincerely,



Sarah Villafuerte-Richards
Clerk to the Trustees

AGENDA

- 1. Apologies**
To receive apologies for absence.
- 2. Minutes**
To approve the minutes of the last meeting of the Diss Surveyors Allotment Charity held on Wednesday 14th January 2026 (copy herewith).
- 3. End of Year Accounts**
To receive and approve the 2025/26 end-of-year accounts of the Diss Surveyors Allotment Charity for submission to the Charity Commission (copy herewith).
- 4. Policy for Allocation of Funds**
To adopt a revised policy on allocation of funding (copy herewith).
- 5. Grant Application Form**
To adopt a revised grant application form (copy herewith).
- 6. Account Balance**
To note the current total Unity Trust balance at 22nd July 2026 is £33,870.72 (copy herewith).
- 7. Date of Next Meeting**
Further meetings of the Charity will be called as required.

Diss Surveyor's Allotment Charity

Minutes

Draft

Minutes of the meeting of the Trustees of the Diss Surveyor's Allotment Charity held in the **Council Chamber** at **Diss Corn Hall** on **Wednesday 14th January 2026** at **7pm**.

Present: Trustees :D. Craggs (ex-officio), J. Robertson(ex-officio), L. Sinfield, J. Welch, A. Kitchen, C. Dente, S. Kiddie (Via Teams), R. Peaty,

In attendance: S. Villafuerte-Richards (Clerk to the Trustees)
District Councillor Minshull
3 members of the public

DSAC0126/01 Apologies for Absence

Councillor's Name	Apologies Received	Absent Without Apology	Reason / Approval
S. Browne	☒	☐	Ill health
K. Murphy	☐	☒	

DSAC0126/02 Minutes

Trustees approved the minutes of the meeting of the Diss Surveyor's Allotment Charity held on Wednesday 18th June 2025.

DSAC0126/03 Change of Bank Account

Members considered the change of Bank account form Barclays Bank PLC to Unity Trust Bank PLC. It was

Resolved: to change the Bank account from Barclays Bank PLC to Unity Trust Bank PLC.
(Action: Finance Officer; immediately)

DSAC0126/04 Date of Next Meeting

Further meetings of the Charity will be called as required.

Meeting closed: 7.03pm.

Cllr Craggs
Chair of the Trustees

DISS SURVEYORS ALLOTMENT CHARITY

Accounts to 31st March 2026

Notes	Capital Brought Forward			Notes	Payments			
Opening balance Capital - as at 1st April 2025	Charinco	£ 39,500.00						
	Charishare	<u>£ 107,600.00</u>	£ 147,100.00					£ -
	Investment Brought Forward							
Bank Balance as at 1st April 2025 - Business Current Account	Unity Current	£ 9,049.64			Closing Balances Carried Forward		as at 31st March 2026	
Bank Balance as at 1st April 2025 - Business Savings Account	Unity Saver	<u>£ 15,297.06</u>	£ 24,346.70	Closing balance Capital as at 31st March 2026	Capital -			
					Charinco	£ 39,500.00		
					Charishare	<u>£ 107,600.00</u>	£ 147,100.00	
	<u>INCOME as at 31st March 2026</u>				Barclays -			
	Interest Received			Bank balance as at 31st March 2026 - Business Current Account	Community	£ 13,469.38		
Interest Received from Black Rock re. Charinco	Charinco	£ 1,746.68		Bank balance as at 31st March 2025 - Business Savings Account	Business Saver	<u>£ 20,001.07</u>	£ 33,470.45	£ 180,570.45
Interest Received from Black Rock re. Charishare	Charishare	£ 7,181.71						
Interest Received from Unity	Unity Trust	£ 1.07						
Interest Received from Barclays	Barclays	<u>£ 194.29</u>	£ 9,123.75					
Total Capital + Bank Balance as at 31st Mar 2026 + Interest received during the year less payments made			<u>£ 180,570.45</u>					<u>£ 180,570.45</u>
	Chairman of Trustees				Clerk of the Trustees			



DISS SURVEYORS' ALLOTMENT CHARITY

Council Offices, 11-12 Market Hill, DISS, Norfolk, IP22 4JZ.
Tel./Fax. - (01379) 643848 Email - townccouncil@diss.gov.uk

Allocation of Funds Policy

Commented [SR1]: This revised policy retains the existing funding controls approved by trustees and incorporates additional governance provisions relating to assessment criteria, conflicts of interest, application requirements and monitoring. These changes are intended to improve transparency and consistency in decision-making and do not alter the Charity's established funding objectives.

1. Purpose

The purpose of this policy is to ensure the proper allocation of funds from the Diss Surveyors' Allotment Charity ("the Charity") in accordance with the Charity's objects:

"The Trust shall apply the income of the Charity as it thinks fit for any charitable purposes for the general benefit of the inhabitants of the Parish of Diss."

2. Principles

When considering applications, Trustees shall have regard to:

- a) The extent to which the proposal benefits the inhabitants of Diss;
- b) The extent to which the proposal provides a lasting community benefit;
- c) Value for money;
- d) The applicant's ability to deliver the proposed project or activity;
- e) The availability of funding from other sources.

3. Capital and Revenue Projects

Preference will normally be given to capital projects that create a lasting benefit for the community and leave a legacy for future generations of Diss.

Revenue projects may also be supported where Trustees are satisfied that the proposal delivers a significant charitable benefit to the inhabitants of Diss.

4. Financial Controls

- a) The minimum balance retained within the Charity's available interest funds shall not fall below £5,000.
- b) Funding approved for any single project shall not normally exceed 50% of the available interest funds held by the Charity at the time the application is considered.

Diss Surveyors Allotment Charity – Allocation of Funds Policy. Last reviewed and approved at a meeting of the Charity held on 29th July 2026.

5. Match Funding

Applicants seeking support for capital projects must provide evidence of match funding secured, or evidence that alternative funding sources have been actively pursued. This reflects the Charity's objective of maximising community benefit from available funds.

6. Repeat Applications

Where funding has been awarded for a revenue project or activity, no further application for the same project or expenditure will normally be considered within two years of the funding award.

7. Conflicts of Interest

Any Trustee with a personal, pecuniary or other relevant interest in an application shall declare that interest and act in accordance with the Charity's governing requirements, Charity Commission guidance and applicable legislation.

8. Applications

All applications must be submitted using the Charity's approved grant application form and must be accompanied by any supporting documents requested by the Trustees.

Trustees may request additional information where necessary to inform their decision.

9. Monitoring

Trustees may require successful applicants to provide evidence that funding has been spent for the approved purpose and may request information regarding the outcomes achieved.

10. Review

This policy shall be reviewed annually or at the next meeting of the Charity if an annual review is not possible.

Reviewed on 23rd July 2026
Next Review due 23rd July 2030

DISS SURVEYORS' ALLOTMENT CHARITY

GRANT APPLICATION FORM

Guidance Notes

The Diss Surveyors Allotment Charity supports projects, activities and initiatives that provide a charitable benefit to the residents of Diss.

Applicants should read the Charity's Grant Policy before completing this form.

Applications may be submitted throughout the year and will be considered by the Trustees of the Diss Surveyors Allotment Charity.

Commented [SR1]: The existing DSAC Grant Application Form is based on a previous version of the Council's grant application process and is significantly longer and more complex than the approach being considered by Council at its July meeting.

The proposed revised form has been based on the Council's proposed Standard Community Grant Application Form to ensure consistency across all grant schemes, whilst retaining several additional questions relevant to the charitable objectives of the Diss Surveyors Allotment Charity. The revised format reduces duplication, improves transparency, and provides Trustees with the information required to assess applications fairly and consistently.

1. Applicant Details

Name of organisation:

Organisation address:

Website or social media page (if applicable):

Main contact name:

Position in organisation:

Telephone number:

Email address:

Reviewed on 23rd July 2026
Next Review due 23rd July 2030

2. About Your Organisation

Type of Organisation

Please tick all that apply:

- ☐ Registered Charity
- ☐ Community Group
- ☐ Voluntary Organisation
- ☐ Community Interest Organisation
- ☐ Sports, Arts or Cultural Organisation
- ☐ Trust
- ☐ Other Not-for-Profit Organisation
- ☐ Other (please specify)

Charity number (if applicable):

Company number (if applicable):

Year established:

Please briefly describe your organisation, its aims and main activities.

Approximately how many people are involved in running the organisation?

Reviewed on 23rd July 2026
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Approximately how many people currently benefit from the organisation's activities?

3. Project Details

Project Title

Amount requested from Diss Surveyors Allotment Charity

£ _____

Total Project Cost

£ _____

Proposed start date

Proposed completion date

Please describe the project or activity for which funding is requested.

4. Benefit to Diss Residents

Who will benefit from the project or activity?

Please indicate whether the project is intended for organisation members only or the wider community.

How will the project benefit the residents of Diss?

Approximately how many people will benefit?

- ☐ Under 25
- ☐ 25–50
- ☐ 51–100
- ☐ 101–250
- ☐ More than 250

Which of the following best describes the intended beneficiaries?

- ☐ Residents of Diss generally
- ☐ A particular group of residents
- ☐ Disadvantaged or vulnerable residents
- ☐ Users of a community facility
- ☐ Other (please explain)

5. Funding and Budget

Project Cost Breakdown

Item	Cost
	£
	£
	£
	£
	£
Total Project Cost	£

Have you applied for, or received, funding from any other source?

- ☐ Yes
- ☐ No

Reviewed on 23rd July 2026
Next Review due 23rd July 2030

If yes, please provide details:

Funding Source	Amount Applied For	Amount Secured
	£	£
	£	£
	£	£

Is your organisation contributing any funding, resources or volunteer time towards the project?

☐ Yes

☐ No

If yes, please provide details:

6. Financial Position

Please state the value of your organisation's unrestricted reserves.

£ _____

If unrestricted reserves exceed the amount requested, please explain why external funding is required.

Please provide a summary of your organisation's current financial position.

7. Project Sustainability and Outcomes

Does the project involve equipment, facilities or other assets requiring ongoing maintenance?

☐ Yes

☐ No

Reviewed on 23rd July 2026
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If yes, please explain how future maintenance and replacement costs will be funded.

What outcomes do you expect this project to achieve?

How will you measure whether the project has been successful?

8. Governance and Compliance

Please confirm that your organisation has:

Requirement	Yes	No
Constitution or governing document	☐	☐
Committee or management structure	☐	☐
Bank account in organisation name	☐	☐
Public liability insurance (where applicable)	☐	☐
Safeguarding arrangements (where applicable)	☐	☐
Risk assessment (where applicable)	☐	☐

9. Supporting Documents

Please provide the following where applicable:

- ☐ Most recent accounts or financial statement
- ☐ Latest bank statement
- ☐ Constitution or governing document
- ☐ Project budget
- ☐ Evidence of proposed expenditure (quotations, estimates or project budget)
- ☐ Evidence of other funding applications

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- ☐ Safeguarding policy (where applicable)
- ☐ Insurance information (where applicable)
- ☐ Additional supporting information

The Trustees reserve the right to request additional information where required to assess an application.

10. Conditions of Grant

If awarded funding, the organisation agrees:

- To use the grant solely for the purpose stated in this application.
- To notify the Charity of any significant changes affecting the project.
- To provide monitoring information if requested.
- To acknowledge support from the Diss Surveyors Allotment Charity where appropriate.
- To return any grant funding not used for the approved purpose.
- To provide evidence of expenditure if requested.
- To comply with all relevant legal and regulatory requirements.
- To retain records relating to the grant for a reasonable period following completion of the project.

The Trustees reserve the right to request repayment of all or part of a grant where the funding has not been used for the approved purpose or grant conditions have not been met.

11. Declaration

We confirm that:

- We are authorised to submit this application on behalf of the organisation.
- The information provided is accurate to the best of our knowledge.
- We have read and agree to the Conditions of Grant.

Applicant

Name:

Position:

Reviewed on 23rd July 2026
Next Review due 23rd July 2030

Signature:

Date:

Second Authorised Signatory

Name:

Position:

Signature:

Date:

Submission

Please return completed applications to:

The Clerk to the Trustees
Diss Surveyors Allotment Charity
11–12 Market Hill
Diss
Norfolk
IP22 4JZ

Email: towncouncil@diss.gov.uk

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Office Use Only

Date received:
[Insert details]

Application complete:
☐ Yes
☐ No

Additional information requested:
☐ Yes
☐ No

Panel review date:
[Insert details]

DSAC meeting date:
[Insert details]

Decision:
☐ Approved
☐ Approved in part
☐ Refused
☐ Deferred

Amount awarded:
£[Insert amount]

Minute reference:
[Insert details]

Monitoring required:
☐ Yes
☐ No

Notes:
[Insert details]

Accounts

Search accounts

Q

Search by organisation name, account number, or account title.

Balance

☒ Less than

☐ More than

£

GBP

Account type

All

▼

Account status

All

▼

Search

X Reset

Diss Surveyors Allotment Charity		£ 33,870.72
	20551911 • <u>Current T1</u>	£ 13,772.41
		Available: £ 13,772.41
	20551924 • <u>Instant Access</u>	£ 20,098.31
		Available: £ 20,098.31