

# THORNBURY LIONS CLUB CHARITABLE INCORPORATED ORGANISATION

## GRANT-MAKING POLICY - May 2018

Under the terms of the Clubs' Constitution, Trustees will apply funds at their discretion, making grants where they believe that their contribution will make a real difference. We can only make grants in furtherance of our charitable objects.

### Priorities for Support

The number of applications that can be supported is, of necessity, limited to the amount of funds available for distribution in any one year. The Trustees have determined that the priorities for funding will be:

- (a) Subject to other elements of the Trustees grant-making policy, restrictions are imposed on the purpose for which a grant may be made; thus applications for support towards capital projects, are not currently considered;
- (b) As there are numerous Lions Clubs in the UK, applications from the Thornbury Area and surrounding districts are generally given a priority. Trustees also consider international funding requests referred to them and by the Lions International organisation;
- (c) Candidates for support and/or grants are all considered on their own merits, following investigation by the 'Welfare Committee'. However, given that most of the available funds are raised within the local community, those candidates that are local are given special consideration. Using the former as a guiding principle the following are examples of areas adopted for support:
  - (C (i) Local charities - youth groups, groups working with the elderly, residential and nursing homes, individual appeals;
  - (cii) Youth and children's organisations - sport related groups or individuals, scouting and guiding, Cadet corps, youth club activities.
  - (ciii) Community facilities - relief of hardship for individuals and families, village hall projects, community group initiatives.

The above priorities in this policy will be regularly reviewed, and may be changed in accordance with the Trustees' view of the most effective application of available funds at any point in time.

## Principles

In awarding grants, the Trustees will apply the following principles:

- 1) Grants are generally made as single payments between £50.00 and £1,500, except in special circumstances decided by the Trustees;
- 2) Trustees will not normally support applications from large national charities (unless it is from and for the local branch use) or charities dedicated to issues deemed by the Trustees to be already well funded;
- 3) Trustees will work with other organisations to fund initiatives beyond the financial scope of a single organisation;
- 4) All applications from previous recipients of grants or from previously unsuccessful applicants will be considered by Trustees on their own merits. Although Trustees will have regard to the outcome of the previous grant, any new application will not receive preferential or adverse consideration.

## Exclusions

The Trustees will not normally approve the use of funds for:

- (a) Medical research projects of international, national or locally based charities;
- (b) Purposes for which government has a statutory responsibility to provide.
- (c) Capital Projects.

## Grant Application Process-

Usually by means of a written application, accompanied by a questionnaire.

All applications for grants should be made to The Chair of Welfare for the time being or to Lion Secretary for the time being.

Before awarding a grant to an organisation or an individual, the Trustees require that the applicant should:

- a) Inform the Trustees of the purpose of the application, details of the project, and the way in which the grant will be used and how it will be managed effectively for its intended purpose;
- b) Provide adequate information regarding the identity and financial status of the applicant and/or of the status of the person(s) who will carry out the project/work; and details (where appropriate) of other funds applied to the same project
- d) demonstrate that the recipient (whether an organisation or an individual) has and will be adequately insured both in relation to any equipment and facilities purchased by the grant; also in relation to any risk of injury by reason of the project or purpose for which the grant is awarded;

c) All equipment purchased with the grant is owned and remains the property of the grant recipient (whether an organisation or an individual);

d) On receipt of the grant, either by cheque or through bank transfer, a written acknowledgement of the receipt is to be issued to the Lion Secretary;

To comply with the Data Protection Act 1998, applicants are required to consent to the use of personal data supplied by them in the processing and review of their application. This includes transfer to and use by such individuals and organisations as the Trustees deem appropriate. The Trustees require the assurance of the applicant that personal data about any other individual is supplied to the Trustees with his/her consent. At the point of submitting application, applicants are asked to confirm this consent and assurance.

### Assessment Process

The assessment process will be that:

(a) All grants applications will be subject to initial assessment to ensure that they meet the basic criteria for funding. Grants will be considered by the Trustees at their meetings and they will aim to write to all applicants informing them of the outcome of their application for funding within three months of the date of the application;

(b) Trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful, however Trustees do realise the importance of feedback and will where appropriate provide suitable comment to the applicant;

(c) Applicants should note that Trustees may receive far more applications than they have funds to support. Even if a project fits with the criteria and priorities of the Trustees and a detailed assessment has been made, Trustees may still be unable to provide the grant.

### Monitoring and Publicity

It is the policy of the Trustees to monitor at their discretion, all grants made. Where the grant is for an extended period, project progress should be reported on a regular basis. In addition to reports detailing progress, grant recipients are expected to provide:

A statement of how the grant monies have been spent, this may be in writing or to take up the opportunity (where appropriate) to visit Trustees to deliver a personal report of how the grant has been spent;

Trustees or their representative(s) may, where appropriate, visit the applicant to view the progress/success of the project and see how and where the grant has been spent.

Trustees ask applicants to consent to the use of their information and project details for publicity purposes, including on-line, in print and otherwise.