



Grant Making Policy

Version: 1.1

Approved: January 2024

Reviewed: February 2025
June 2025

Version control

Version	Amendment(s)	Date approved
1.1	Branding and style guide applied.	Completed February 2025

1. Purpose

The purpose of this Grants Policy is to set out the aims and principles for the distribution of funds and resources to individuals, groups and/or organisations seeking support from Friends of Berrycroft.

2. Eligibility

The trustees of Friends of Berrycroft will consider grant applications from individuals, groups and organisations to fund projects and activities that are exclusively aligned to the purpose of the charity.

3. Grant making criteria and priorities

- It is anticipated that the number of good grant applications will exceed the funding available, so each grant application will be subject to scrutiny against a range of criteria, prior to any awarding decision being made.
- Applications will be evaluated based on criteria such as alignment with the mission of Friends of Berrycroft, demonstrated need, impact as well as feasibility, whereby the due diligence process has not identified any unacceptable issues.
- Specifically, people most in need, including but not limited to;
 - Those within the protected characteristic groups as outlined by The Equality Act 2010.
 - Those who may be considered most vulnerable such as children or older people.
 - Those who may be facing socio-economic deprivation.
- In addition, trustees may allocate funds where a small grant may mitigate a shortfall in funding thereby enabling a larger project to go ahead.
- From time to time, other priorities may be identified by the trustees and may subsequently receive funding in accordance with this policy.
- Grants will be made based on the funding available and solely on merit.
- Charitable organisations must have a written constitution, with exclusively charitable aims, and be run by a minimum of at least 2 trustees. In making grants, trustees will comply with Charity Commission guidance, to ensure that it

is in the charity's best interests, check that any money is used as it is expected it to be and the decision recorded in the minutes.

- Support for government organisations will only be considered where these is either no, or inadequate statutory provision.
- In the event that the trustees wished to support an organisation that isn't a charity, they are aware of and would comply with the Charity Commission's guidance on doing so. In particular, they would ensure that the grant is only for to further the charity's purposes, any funding of support costs would be limited to the specified activities, services or outcomes, the grant agreement requires the above be complied with, there is no more than incidental personal benefit and the trustees can demonstrate that the decision is in the charity's best interests.

4. Submission of grant applications

- Friends of Berrycroft require submissions to be made using the application form and word limits adhered to where specified. However, relevant supporting documents can also be included, such as a programme plan or budget as appropriate.
- Applications may be received via post or as an e mail attachment.
- Prior to submission it is the responsibility of the applicant(s) to ensure the following criteria are clearly outlined within the submission;
 - How your charity, group or organisation meets the funding criteria and priorities of Friends of Berrycroft.
 - Information on your organisation/individual.
 - Project/bid details, such as amounts, numbers, timetable.
 - Evidence of the need and impact the funding would have.

4.1 Safeguarding

Working with children or vulnerable adults, applications are to include details of the procedures used to ensure they are kept safe from harm and how management ensure these are applied consistently. These must comply with the charity's safeguarding policy and legislation, and any regulation specific to the activity.

4.2 Health & Safety at Work (H&SW)

The organisation has a robust Health & Safety at work framework and management oversight, with adequate policies that are consistently applied and training that is undertaken by everyone who needs to and is up-to-date.

4.3 Insurance

Details of insurances held, with a certified true copy of the insurance policy.

4.4 Property / Assets Created

Confirmation that any assets, intellectual property or other material of financial value created will not be disposed of at any point, without confirmation that any proceeds will be used for an approved charitable purposes and the prior written permission of the trustees. In the event this is not forthcoming, the asset is to be disposed of in accordance with the trustees' instructions.

5. Reporting

All grantees will be required to provide a report on how their grant was used and the impact this has had. The content and nature of information to be reported will be appropriate for the size and type of grant awarded. The charity will monitor such reports to not only ensure that grants are being use for the purposes intended, but also to assess the impact grants have made. This learning will be used to inform future decision making and policy to maximise the charity's impact.

6. Accountability

Grantees are expected to use the funds in accordance with the terms and conditions outlined in their grant agreement. Friends of Berrycroft reserves the right to reclaim funds if they are not used as intended.

7. Charity grant management

7.1 Decision making process

- Applications will be considered by the Friends of Berrycroft Trustees, who work to the Charity Commission C27 guidelines on trustee decision making.
- Grants are awarded entirely at the discretion of the trustees and are made in good faith. Their decision is final.

7.2 Notification

- All applicants will be notified of the outcome of their bid and successful applicants will have funding made available, once they have signed a grant agreement.

- For organisational grants, we have a formal grant agreement.
- For small grants and any to individuals, we advise applicants of their award and include their obligations in receiving it;
 - Confirming receipt;
 - It may only be spent for the purposes for which it was given.
 - Any unused portion of the grant is to be returned to the charity.
 - Reporting back on how the grant was spent;
 - Reporting back on the impact the grant had and;
 - Any supporting evidence required, such as receipts;
 - Including any deadline for doing so.

7.3 Data protection

- All grant applications and related documents are treated as confidential and are subject to privacy and data protection laws.
- Applicants' data will be held in accordance with data protection legislation. It will be held securely, disclosed if subject to an access request, treated as confidential, only used for the purpose for which it has been provided and destroyed, once no longer needed.

7.4 Safeguarding

- In making grants to or working with other organisations we will comply with Charity Commission guidance by carrying out relevant due diligence and having a written agreement that sets out:
 - Our relationship.
 - The role of each organisation.
 - Monitoring and reporting arrangements.

7.5 Checks and due diligence

- The charity will carry out sufficient due diligence on grant applicants to confirm the identity of the applicant and ensure;
 - Any funding will be applied in accordance with the charity's charitable purposes.
 - Funds will not be knowingly used for illegal purposes, such as money laundering, bribery or financing terrorism.
 - The applicant does not hold views or have any involvement in activities contrary to the charity's values and charitable purposes.

7.6 Promotion

- Often those the charity are trying to reach are the least able to be able to research and seek out opportunities to make effective applications. Consequently, it is important to ensure that those hard to reach groups the charity is seeking to reach are made aware and that the application process is kept as simple as possible.
- Ways in which people can be made aware include promotion:
 - via websites, such as funders, local community groups and foundations.
 - Social media – either groups relevant to our activity, or local town/village/community groups.
 - Posters in the community including within Berrycroft Community Health centre, as well as religious buildings, shops.
 - Through networks of those who come into contact with potential beneficiaries, such as relevant statutory services and charities.
- For some groups, information may be provided in an alternative way, such as an additional language, to make these accessible to people who have disabilities.

8. Charity grant management

For enquiries and further information regarding this policy, please contact Friends of Berrycroft at enquiries@friendsofberrycroft.org

9. Policy Approval

This Grant Making Policy is approved by the Board of Trustees of Friends of Berrycroft and is effective from the date below.

Approved by: (Signature)



Approved by: (PRINT NAME)

JACQUELINE HARRIS

Chair of Trustees, Friends of Berrycroft

Date: 28/03/25