**Grant Making Policy**

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; these details of the Objects of the Club are shown in the Annex to this document.

**Grant making committee**

This committee **will have no decision making powers** , all financial awards decisions will continue to be made by Trustees and members during the regular monthly meetings. The role of the committee will be to support and facilitate the delivery of the overall programme of financial assistance.

**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, no restrictions other than those covered in the **exclusion** section, are imposed on the purpose for which a grant may be made; thus applications for support towards capital projects, other projects or core costs are considered.

(b) As there are numerous Lions Clubs in the UK, applications from the Bridlington town area and the local community are generally given a priority, with those in the surrounding villages and which come under the area served by other Lions Clubs, generally within the same zone, are also considered.

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 ‘Grant making 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.

(ci) Local charities – As a general rule, the club does not support national charities, but some local ones receive help in some form. The support is usually in the form of help for local care homes and various groups of elderly people. Some support is given to locally run charities and individual appeals.

(cii) Youth organisations – This covers support for uniformed groups such as Cadets, Scouts, Guides and other youth groups. Support is also given to local sports groups which includes football teams, gymnastic and swimming groups.

(ciii) Community facilities – Environmental projects which include, tree and bulb planting, garden projects for special needs people, defibrillators, various arts projects, minibus for community use.

The above priorities in this policy will be reviewed each year (or more often if deemed appropriate) by the Trustees, 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**

In awarding grants, the Trustees will apply the following principles

Grants are generally made as single payments between £100 and £2000. However, where the request involves individual or groups who, in the opinion of the Trustees, can raise some funds from other sources, the grant will be as a promissory note on the condition that the total amount, excluding the promissory note is raised from other sources.

Trustees will, whenever it is practical, respond to a request with material help rather than financial. This ensures that any help is seen to satisfy the request.

Trustees will not normally support applications from large national charities, unless it is for use by the local branch. On occasions there are certain national charities which have been supported by the Multiple District of Lions Club International, and will be supported by the club. In these cases it is always requested from the charity involved that the support is directed locally wherever possible.

Trustees will consider working with other organisations to fund initiatives which are beyond the scope of a single organisation.

All applications from previous recipients of grants or from previously unsuccessful applicants will be considered by the 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) Purposes for which the local government has a statutory responsibility to provide.

(b) Local hospital equipment unless in memory of a past member.

(c) Outright financial help (see under ‘principles in awarding grants’)

**Grant application process**

All application for grants should be made in writing to Lion President, Bridlington Lions Club, or to the Secretary.

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

Inform the Trustees of the purpose of the application, details of the project, the way in which the grant will be used and how it will be managed effectively for its intended purpose:

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 work/project;

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.

All equipment purchased with the grant is owned and remains the property of the grant recipient

(whether an organisation or an individual)

On receipt of the grant, either by cheque, cash or through a bank transfer, a written acknowledgment 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 an application, applicants are asked to confirm this consent and assurance.

**Assessment Process**

(a) All grant applications will be subject to initial assessment to ensure that they meet the basic criteria for funding. This assessment will be recorded on a special form involving a tick-box process.

Following a meeting involving Trustees and club members, the club Secretary will write to the applicant informing them of the outcome of their application within twelve weeks of the date of application.

Efforts will be made to respond quicker to applicants if the request involves present hardship.

(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 supply the grant.

**Monitoring and Publicity**

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

of writing or in person by a visit to or from the Trustees.

Trustees ask applicants to consent to the use of their information and project details for publicity purposes

including on-line, in print and otherwise.

Issue 2 17.03.21

**ANNEX**

**Charitable Objectives of Bridlington Lions Club (CIO)**

The objects of the club are those purposes which are exclusively charitable in England and Wales, including in particular.

Promoting the principles of good citizenship

Encouraging members to take an active interest in the civic, cultural, social and morale welfare of the community.

Providing a forum for open discussion of all matters of public interest; providing that partisan politics and sectarian religion shall not be debated by members.

Encouraging service minded people to serve their community without personal reward and encouraging the promotion of high ethical standards in commerce, industry, professions, public works and private endeavours;

Supporting youth to develop their skills, capacities and capabilities to enable them to participate in society as mature and responsible individuals;

Promoting the voluntary sector for the public benefit by associating with the local authorities in a common effort to advance education and provide facilities in the interest of social welfare for recreation or other leisure time occupation to improve the conditions of life of people in local, national and international communities;

Promote volunteering;

The relief of poverty and the relief of those in need in particular by providing humanitarian aid and disaster relief;

The advancement of health or the saving of lives by preventing avoidable blindness, assisting disabled people to lead independent lives or helping to prevent or manage health issues;

Promoting for the benefit of the public the conservation protection and improvement of the physical and natural environment. And/or promoting community participation in healthy recreation;

Nothing in the constitution shall authorise an application of the property of the club for the purposes which are not charitable in accordance with section 7 of the Charities and Trustees Investment (Scotland) Act 2005 and section 2 of the Charities Act (Northern Ireland) 2008

Issue 1. 16/11/18