

# Grant Making Policy

November 2022



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## 1. Purpose

- 1.1. The purpose of this policy is to set out the principles, criteria and processes that govern how the Everybody Foundation awards grants.
- 1.2. A grant is defined as a financial award made by the Foundation from its funds to support charitable activities, primarily to constituted groups or individuals in need, but sometimes to other bodies.

## 2. Background

- 2.1. The Everybody Foundation is a charitable incorporated organisation (Registered Charity Number 1174873) benefiting particularly the public in the areas where Everybody Health and Leisure operates. It is governed by a board of trustees.
- 2.2. The Everybody Foundation has three aims.
  - I. Promotion of a healthy and active lifestyle
  - II. Assisting individuals to achieve their potential
  - III. Improvement to facilities used to fulfil an active lifestyle

## 3. Grant Making Principles

- 3.1. The Everybody Foundation budget for each round is decided by the trustees based on the donations received in the previous period.
- 3.2. All decisions will be made based on the principles outlined within this policy and the agreed budget for the period. The budget is managed flexibly and diligently to ensure that the Everybody Foundation has funding available to award in all funding rounds.
- 3.3. Given the limited allocation for each period and the Everybody Foundation wanting to support as many worthy causes as possible they cannot guarantee to fund the amount requested even for successful applicants. Therefore, if the full amount cannot be awarded, the Everybody Foundation will need to ensure that organisations and individuals have alternative finance in place to cover any outstanding balances prior to releasing the funds.

## 4. Grant Making Criteria

- 4.1. Applications will only be considered from groups or individuals, that benefit the communities in which Everybody Health & Leisure operates. Applications from individuals will need to show a significant connection with these communities to be considered.
- 4.2. Organisations need to be a voluntary or community organisation, registered charity or other not for profit organisation with a management committee,

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bank account, governing document and appropriate policies and procedures in place.

## **5. Application Process**

### How to apply

- 5.1. Applications for the Everybody Foundation must be made using the Everybody Foundation Application Form.
- 5.2. All information on the application form must be completed. Incomplete applications will not be considered and will be returned. This could cause your application to be delayed or deferred.
- 5.3. Supporting documentation may be requested prior to the application being fully considered. Failure to supply all the required documentation by the deadline given will result in the application being treated as incomplete.
- 5.4. The closing dates for receipt of applications will be subject to change each year. Applications must be completed and returned via email to [foundation@everybody.org.uk](mailto:foundation@everybody.org.uk).
- 5.5. All grants must be formerly awarded before any work or purchases requested in the application are made.

### Who can apply

- 5.6. Depending on specific round criteria, applications can be made by anyone on behalf of themselves, another individual or a group/organisation.
- 5.7. The maximum individuals and organisations can be awarded will be subject to change each year.
- 5.8. Priority will be given to organisations that are providing contributions from their own funds. New applicants will also be given priority subject to all other conditions being met.
- 5.9. The Everybody Foundation can fund individuals or organisations that:
  - Are active within or have significant links to communities in which Everybody Health & Leisure operates.
  - Demonstrate a clear need for the money requested and the difference it will make.
  - Complete the application form in full, with all the required detail.
  - Have their own bank or building society account.

For organisations only:

- Organisations are required to be based within communities in which Everybody Health & Leisure operates.
- Be a sporting, voluntary or community organisation, registered charity or other not for profit organisation.
- Have a bank account and the ability to provide such information as reasonably requested to illustrate the organisations financial position and the need for assistance requested.

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- Have a management committee and governing document.
- Have appropriate safeguarding policies and procedures including a requirement that staff/volunteers are cleared with the Disclosure and Barring Service where appropriate.

#### 5.10. What cannot be funded

The following cannot be funded:

- 5.10.1. Activities of a mainly political or religious nature;
- 5.10.2. Work that has already taken place before the award of the grant offer;
- 5.10.3. Land purchase;
- 5.10.4. Vehicle purchase;
- 5.10.5. Salaries;
- 5.10.6. Items that are being purchased on behalf of another group;
- 5.10.7. Events that do not benefit the local community;
- 5.10.8. Organisations that hold substantial free reserves.

#### 5.11. General Criteria

- 5.11.1. Individuals and organisations must be able to participate in a monitoring and evaluation process and provide the requested information to evidence how the grant funding has been spent, the outcomes achieved and adherence to the conditions of the grant. This may include receipts or invoices and a written report of the project, activity or event, plus photographs if possible, on completion;
- 5.11.2. Individuals and organisations must acknowledge the support of the Everybody Foundation in press releases, publicity and advertising etc.;
- 5.11.3. The individual or organisation will allow the Everybody Foundation to potentially use details of the grant award, together with any relevant photographs supplied, in newsletters and on the Everybody Foundation's website;
- 5.11.4. Expenditure requested in the application, must not be incurred on the project, activity or event prior to the grant decision being given. In these circumstances the Everybody Foundation will withdraw the grant offer/rescind the grant decision;
- 5.11.5. Any profits from events must be used to further develop the organisation or for any future events and not used to support other organisations or individuals;
- 5.11.6. If the project involves work on land or a building, including refurbishment, the applicant must own the freehold of the land or building, or hold a lease that cannot be brought to an end by the landlord for at least 5 years;
- 5.11.7. If planning permission is required this must be in place before the grant application is made. The Everybody Foundation may ask for confirmation that planning permission is not required, or that it is required and has been granted. Grant applications without planning permission in place will be considered if the application is for a

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feasibility study or architects fees in order to establish the viability of the project;

- 5.11.8. Organisations must be committed to and have policies on equalities and inclusion and in delivering the services or activity the organisation must not unlawfully discriminate, directly or indirectly against any of the nine protected characteristics which are: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation. The organisation can direct some or all of its activities at specific groups where the intention is to address discrimination or disadvantage;
- 5.11.9. The grant must only be used for the purposes specifically stated in the application form, should it be spent in any other way, without written approval from the Everybody Foundation, the individual or organisation may be asked to return some or all of the monies paid;
- 5.11.10. If the project, event or activity is cancelled or only partially achieved, or if the organisation is wound up, any unused grant money must be returned to the Everybody Foundation;
- 5.11.11. All conditions under which the grant has been awarded, including any special conditions, must be met. Failure to do so could result in the individual or organisation being asked to repay the grant monies to the Everybody Foundation.

## **6. Grant Making Process**

- 6.1. All applications will be considered by the trustees at meetings at least three times per year as outlined in 5.4.
- 6.2. All applicants will be notified of the outcome of their applications within eight weeks of the closing date.
- 6.3. Complaints about the Everybody Foundation's decision-making process will be dealt with in line with the Everybody Foundation Customer Feedback process which can be obtained from the Everybody Foundation.

## **7. Receipt of Funding & Monitoring**

- 7.1. Grant recipients may be required to provide a grant report and invoices or receipts to ensure that monies are used in an appropriate manner, as set out in this Policy.
- 7.2. All reports and invoices/receipts must be submitted to the Everybody Foundation within twelve months of the date of the offer letter.
- 7.3. If organisations or individuals do not supply the required monitoring reports and supporting information in full and within the set time scale they may be asked to repay the grant funding to the Everybody Foundation. Failure to comply with monitoring requirements will also be considered when assessing future applications made by the same organisation or individual.

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