



*Effective grant making
through your local giving*

Community Foundation for Calderdale

Grants Policy 2010/11

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Introduction

The Community Foundation for Calderdale is an independent local organisation which raises funds from a broad section of corporate and individual donors, and statutory agencies, to support voluntary activity within Calderdale. The Foundation has the power to make grants outside of Calderdale where it is specific to donor requirements and Trustees consider it in the greater interest of the Foundation's aim to support the community in Calderdale.

The Foundation seeks to provide innovative leadership on community issues through thoughtful grant making that meets the aims and objectives of donors. The grants budget is funded by the income from a growing permanent endowment, 'flow through' funds and through providing grant making services.

The Foundation has established a comprehensive grants programme for the benefit of people who live and work in Calderdale. The Grants Committee seeks to achieve an equitable distribution, based on consultation with stakeholders and with particular support targeted at communities in need and issues identified through a consultation process.

Aim of the policy

This document relates to the grant making activity within the Foundation and sets out relevant policy and outline procedures. It enshrines grant making structures to ensure robust, transparent and accessible grant making to the wide range of voluntary and community organisations active throughout Calderdale, West Yorkshire and further a field. The policy aims to provide clear and consistent grant making, but also, where it lies within the foundation's objects, to remain flexible in order to ensure that donors' wishes can be adhered to and accommodated. The Foundation also supports individuals in need via 'referring agencies' who work with the most vulnerable members of our community.

This policy sets out the processes to be undertaken by Trustees, staff and volunteers of the Foundation in the delivery of its aims. It identifies clear lines of responsibility, recognising the key role of managing funds. It is imperative that the Foundation remains flexible, whilst operating to a high standard of good grant making practices.

'The Company is established for the support or promotion of any charitable purposes for the relief of poverty the advancement of education (including training for employment or work) the advancement of religion or any other charitable purpose for the benefit of the community in the area of the metropolitan District of Calderdale and its immediate neighbourhood and other charitable purposes in the United Kingdom with a preference for those which are in the opinion of the Executive Committee beneficial to the community in the area of benefit.'

Excerpt from the Memorandum of Association

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1. Working with Donors

The Foundation's work of raising money to support the community would be impossible without our many donors who are actively involved in our grant making. Their contribution to the community is highly valued. We wish to ensure that donors are given every opportunity to donate and be appropriately involved in the grant making process and in funded projects.

The Foundation's Donor Care Plan (available on request) outlines the grant making services to be provided to donors. The aim of the Grants Policy is to ensure that this has a positive effect on those wishing to access grants.

The Foundation raises funds to support its grant making from a wide variety of sources including:-

- Individuals
- Local and national charitable trusts and Foundations
- Local and national companies and businesses
- National and local Government funding streams
- European funding streams

2. Types of Fund

The Foundation is able to make grants is from a variety of funds designed to give established and potential new donors the optimum opportunity to give. These are listed below:-

Endowed fund A permanent fund based on the principle of endowment whereby a capital sum is invested over time, creating a growing and sustainable source of funding for grant making now and in the future.

Flow-through fund Donations channelled through the Foundation to be distributed in grants in the short term.

Endowed and flow-through funds may be further defined as: -

Named fund This is where, as an alternative to setting up an independent family or company trust, the donor chooses to use the Foundation to administer their grant making. Such donors may choose to be actively involved in approving grants given from it.

Area or theme fund This concentrates on a specific geographic area or an area of interest (e.g. health issues or youth).

Donor advised fund This is usually a named fund where the donor is actively involved with the decisions on how the fund is distributed.

Donor directed fund This is completely at the discretion of the donor and accommodates very specific donor requirements such as one-off large donations, loans and caveats to the grants being given.

Unrestricted fund This would have no restriction on its use, thus allowing the Foundation to use its expertise and knowledge of local needs in distributing income to where it is most needed.

3. Methods of Grant Making

3.i Managed programmes

Managed programmes of funding for other bodies, e.g. local or national Government or other grant making trusts. In these cases the Foundation operates grant making on behalf of, for example, statutory agencies, or charitable bodies. These programmes generally have their own rules of eligibility with criteria chosen by the donor organisation.

Also the amounts available and the eligibility and criteria will depend on the scheme or programme.

The decision making panel for these funds can sometimes be independent of the Foundation's Grants Committee.

3.ii Funding for Individuals

Provision of funding on a 'year round' basis aimed at supporting people in urgent need, or in a crisis situation, usually through referring agencies. The Foundation is also able to provide funds for individuals from a number of named endowment funds.

3.iii On-line Giving

Funding received through philanthropic websites for distribution through the Foundation's grant making processes, including from the Community Foundation Network's national philanthropic giving website, Local Giving. Com.

3.iv Local Giving Dot Com

This provides an alternative facility for voluntary and community organisations to receive funding. Voluntary and community organisations in Calderdale are eligible to receive funding from Local Giving. Com. Further details of this are cited under section 7 (Application processes)

4. Funding Programmes

The range of grants offered by the Foundation reflects the grant making service offered to donors and the ways in which the Foundation seeks to support the community through fundraising. It takes into account trends in grant making and the results of consultations.

Responding to a tougher economic climate the Foundation is providing two specific strands programme of grant making. These two new programmes, the Donor Interest Programme and the Priority Issue Programme, replace the 'Main Programme' operated up till 30 June 2010. These are the key aspects of the grant making programme to be operated by the Foundation.

4.i Donor Interest Programme

The 'Donor Interest Programme' has a focus on ensuring that the needs of grant applicants are matched to donors' interests. This will provide grant making via a single point of entry application system, without deadlines for applicants. The Foundation generally welcomes applications from a wide range of projects and activities from eligible organisations with charitable purposes.

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Applicants are provided with information about donors' interests and their projects are matched with and agreed by donors.

Usually small awards of up to £3,000 are made, but donors can be given the flexibility to fund higher value projects. Individuals cannot benefit from a grant from the Foundation's Donor Interest Programme.

Donor Interest Programmes are aimed at enabling applicants to be supported by at least one of the Foundation's donors.

4.ii Priority Issue Programme

This a programme of awards focused on issues identified through the Foundation's consultation with stakeholders (e.g.local VSC meetings, the visioning events and other feedback opportunities) Additionally, national priorities as they are relevant to local organisations and groups have been taken into account. This is an annual programme of awards, with specific eligibility and criteria, meeting the needs and issues identified as a result of the Foundation's consultation processes.

This programme has strict aims and objectives and operates within a fixed time scale and eligible applicants will be locally led organisations with charitable purposes and local intelligence.

The aim is to address unsustainable trends in grant making by developing a means of creating a more connected and sustainable community and voluntary sector. The focus is on three issues;

Caring Sharing and Connecting

This element of grant making is aimed at addressing the issues of connectivity as identified by VCS groups at 'Sharing the Vision' consultation events.

One award of up to £15,000 with potential for a two year programme to a single provider for enabling VCS groups to:

- Provide a central resource for groups to access so they can connect with each other and work more effectively and efficiently together by having easier communication.
- Access information about accommodation and work space and other facilities to promote shared resources.
- Share the skills and resources of current volunteers and increase the number of volunteers.

Important Note: This element of the policy may be subject to change or cancellation following further consultation with local infrastructure agencies to be conducted in July and August 2010.

'Durability and sustainability'

Sustainability has been identified as one of the most difficult areas for community and voluntary organisations to address. This element of the Priority Issue Programme focuses on sustainability as an outcome by using a triage style approach to diagnosing the issues and difficulties of the applicant groups as part of the application process.

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This element of grant making is aimed at providing support and expertise for the local VCS groups to develop a sustainable model of working.

Awards of up to £10,000 are available and the recipient organisations are required to : -

- Remedy their immediate need, which might result in a small percentage of funding of salaries for a limited period with a clear remit to address specific problems
- Utilise appropriate organisational development so they can identify the ways in which they can become sustainable
- Gain support in service development to help them deliver services that meet their own aims and objectives, in a more focused way.

Important Note: This element of the policy may be subject to change following further consultation with local infrastructure agencies to be conducted in July and August 2010

"Celebrating Calderdale"

Every year several groups or organisations apply to the Foundation for funding of festivals, events and other activities aimed at celebrating cultural traditions or areas of Calderdale.

These events do promote social cohesion and offer fund raising opportunities for the voluntary sector. However the growing trend for applications to support local festivals is not sustainable by the Foundation.

A single award of up to £10,000 (which can be shared by several groups applying together under one application).

This element of the Priority Focus Programme aims to supporting a single festival annually enabling the following more effective aims and outcomes;

- Bring together people from all corners of Calderdale
- Actively include culturally diverse communities
- Link with other events and festivals in Calderdale
- Be broader than a single issue event
- Provide significant profile for CFFC

4.iii Local Giving Dot Com

This provides an opportunity for voluntary and community organisations to attract funding through their own presence on the national Local Giving. Com website with donations managed through the Foundation locally. More details on this are provided under **section 7** of this document (re the application process).

Amounts Available - Groups are able to receive up to a total of £10,000 in any one year period

Eligibility -Voluntary and community organisations funded in the previous two years who have successfully run projects and fulfilled monitoring and evaluation requirements.

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Exclusions - Organisations not previously funded by the Foundation.
Organisations failing to submit monitoring and evaluation for projects funded by the

5. Funding for Individuals

The Foundation supports individuals both directly and through referring agencies from a range of funds. Referring agencies are organisations and other charities directly supporting individuals, including Social Services, Citizens Advice Bureau, Calderdale SmartMove, Age Concern and some health visitors/health professionals. There are differing eligibility criteria (set out under each named fund).

Referring agencies may be allocated up to £5,000 from which to allocate funding within the criteria set by the Foundation. The Foundation's general limit for any individual is £250.

The Individual Fund

Support is only via a referring agency

Amounts Available

- A total of £130 for urgent and immediate need in a twelve month period.

Eligibility

- Individuals in crisis or emergency need, in particular those who cannot be supported by statutory agencies.

Halifax Old Folks Holiday Fund

Support may be directly to an individual applicant by the Foundation or through or via referring agencies.

Amount available

- Grants of up to £250

Eligibility

- Individuals over the age of 60 in need of support, due to economic disadvantage, towards the cost of a break away from home.

Noel John Greenwood Halifax Children's Trust

Support may be directly to an individual applicant by the Foundation or through or via referring agencies.

Amount available

- Grants up to £130

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Eligibility

- Children and young people, up to the age of 18, who are facing disadvantage in their lives and in accessing education, in the parliamentary constituency of Halifax.

6. General Eligibility & Criteria

This section deals broadly with the eligibility and criteria for each programme. This information is provided in greater detail in the guidelines for applicants.

Eligible applicants will be organisations with charitable purposes usually benefiting the people of Calderdale.

Amounts available will be varied according to applicants' need and donor decision.

Exclusions are as listed below;

Community Interest Companies would only be considered where they are not companies limited by share capital. I.e. those without an asset lock consistent with the Foundation's main objects.

General appeals grants should only be for specific projects.

Retrospective funding - grants are not available to pay for a project which has already taken place or to pay for expenditure already allocated, invoiced or spent.

Statutory funding - grants are not available to support or replace services which would normally be funded from statutory sources.

The advancement of religion -faith groups can only apply where the aim of the project is to support a wide group of beneficiaries where no one is excluded on grounds of faith.

Political activities are incompatible with the Foundations aims therefore projects supporting local and national politics are not eligible.

Projects that do not directly benefit people living in Calderdale are not usually eligible but, exceptions can be made, within the Foundation's regulations.

Groups who do not have a bank account - Groups without a bank account in the name of the applicant organisation, with at least two unrelated signatories who are members of the management committee (or staff members with delegated responsibility from the management committee) are not eligible.

Informal groups who do not have a formal constitution or set of rules cannot apply.

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7. Application Processes

The process for applicants is outlined here and provided in more detail in the guidance for applicants for each programme.

Donor Interest Programme

- Applications accepted all year round for a rolling programme of grant making.
- Decisions are made within 12 weeks of receipt of an application complete with all requested information.
- Projects may be subject to a telephone assessment. .
- Applications are subject to donor approval.
- Awards of more than £5000 are subject to a satisfactory reference.
- The Foundation's Grants Committee verifies and governs decisions through e-conference.
- All applicants are written to with the outcome of their application.

Priority Issue Programme

- Programme is promoted
- Applications are accepted within agreed and promoted timescales.
- Decisions are made within 12 weeks of the deadline.
- Projects are subject to either a telephone assessment and/or an interview conducted by a representative of the Foundation.
- Applications are subject to a satisfactory reference that must be received in the period prior to decision making.
- Applications are considered at a meeting of the Grants Committee, or a nominated subgroup.
- All applicants are written to with the outcome of their application.

Funding for Individuals

Funding for individuals may be carried out on behalf of the Foundation by selected agencies. These processes apply equally to the direct funding of individuals by the Foundation or where an agency is acting on the Foundation's behalf.

The Individual Fund

- Can be accepted all year round.
- Applications are considered as soon as possible and a decision usually made within 5 working days.
- Awards from the Foundation are to the referring agency responsible for ensuring that the individual is supported in the expenditure of the grant.
- Awards may be made directly to a supplier of the goods or service.
- Awards are made directly by the Foundation to individuals only where there is no alternative.

Halifax Old Folks Holiday Fund

- Applications are accepted annually within the promoted timeframe.

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- Applications are considered as within the timeframe with applicants informed within 10 working days of the decision.
- Awards from the Foundation are to the referring agency responsible for ensuring that the individual is supported in the expenditure of the grant
- Awards may be made directly to the supplier of the goods or service.
- Awards are made directly to individuals only where there is no alternative.

Noel John Greenwood Halifax Children's Trust

- Applications can be accepted all year round.
- Applications are considered as soon as possible and a decision usually made within 10 working days.
- Awards from the Foundation are to the referring agency responsible for ensuring that the individual is supported in the expenditure of the grant,
- Awards may be made directly to a supplier of the goods or service.
- Awards are made directly by the Foundation to individuals only where there is no alternative.

Managed Programmes

The Foundation provides grant making services for other funders including statutory agencies, local and national Government and charitable trusts. These programmes usually have their own grant making panel. The Foundation's Grants Committee oversees the decision making of separate grants panels for managed programmes and can also provide a decision making panel, particularly for programmes in Calderdale.

Local Giving Com

Voluntary and community organisations in Calderdale are eligible to receive funding from Local Giving. Com.

Process

- The Grants Committee agree the eligibility for organisations and the level of funding potentially to be received.
- Eligible applicants are invited to register and set up their site on Local Giving. Com
- Donations will be regularly monitored
- Recipient organisations will be included in monitoring and evaluation processes

Donor Directed Fund

Where the Board of Trustees believes it to be in the interest of the Foundation, the very specific wishes of a donor will be met in line with specific processes devised individually for the donor.

Process

- The Grants Committee agree the eligibility for organisations and the level of funding potentially to be received.
- Eligible applicants are invited to register and set up their site on Local Giving. Com
- Donations will be regularly monitored
- Recipient organisations will be included in monitoring and evaluation processes

8. Grants Assessment

All applications to the Foundation's Main Programme are appropriately assessed and may be scored according to set priorities alongside qualitative scores. The assessment process aims to ensure projects are assessed for intrinsic qualities appropriate and proportionate to the organisation, the project and the level of funding. The assessment may include a telephone interview providing an opportunity for applicants to provide further information about their project and is particularly supportive of applicants who are not skilled in completing grant applications.

During the assessment process Grants Staff will consider ways of incorporating capacity building support, through recommendations and signposting to achieve improvements, either for the project or for the applicant organisation.

8.i The Donor Interest Programme

Assessment covers: -

- Eligibility, with only complete applications being forwarded to donors
- Organisational capacity to ensure that the project can be successfully carried out
- Project quality
- Project budget to ensure value for money

Organisational eligibility is demonstrated by submission of:-

- Governing document appropriately signed and/or confirmed as being the adopted governing document for the applicant group
- Accounts for the most recent financial year appropriately signed
- Bank account details
- Safeguarding policies and confirmation of CRB checks where the project involves children & young people and/or vulnerable adults.

Applications from previously funded groups only need submit the appropriately signed accounts and a declaration confirming that the required supporting documentation is in place.

Applications from registered charities need not submit supporting documentation, at the discretion of the foundation, provided their Charity Commission submission is up to date.

Applications for awards of £1000 or less need only submit appropriately signed accounts and a declaration confirming that the required supporting documentation is in place.

8.ii Priority Issue Programme

Assessment covers: -

- Eligibility with only complete applications being assessed
- Organisational capacity to ensure that the project can be successfully carried out
- Project quality
- Project budget to ensure value for money
- Scoring against an agreed system to ensure objectivity

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Organisational eligibility is demonstrated by submission of:-

- Governing document appropriately signed and/or confirmed as being the adopted governing document for the applicant group
- Accounts for the most recent financial year appropriately signed
- Bank account details
- Safeguarding policies and confirmation of CRB checks where the project involves children & young people and/or vulnerable adults.
- Clear evidence, justification and explanation of costs.

Applications from registered charities need not submit supporting documentation, at the discretion of the foundation, provided their Charity Commission submission is up to date.

9. Notes on Eligibility

9.i Constitution and Governance

The Foundation wishes to support constituted voluntary and community groups carrying out charitable activities and is guided by the Charities Act 2006 and subsequent revisions.

Applicants are required to submit their, appropriately signed governing documents to the Foundation to demonstrate their legal status. Unsigned copies may be accepted if appropriate confirmation can be sent.

9.ii Financial Accounts

Annual accounts demonstrate the safe handling of any grant awarded. This helps the Foundation to ensure that funded projects are carried out by groups and organisations with a relevant level of finance and financial skill.

It is expected that successful applicants will show separately in their annual accounts any award from the Foundation.

9.iii Safeguarding children, young people and vulnerable adults

Groups are required to submit their policies and these will be assessed as to their suitability for the project applied for.

9.iv Evidence of cost

Projects may be asked to supply quotes, or other evidence of cost for single high value items. They may also be asked to explain or justify other costs depending on the level of funding applied for.

9.v Reason for rejection

All rejected applicants are given the reason for the rejection of their application.

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9.vi Appeal process

Applicants may appeal. Their first step is to contact grants staff who will discuss their application with them and give further feedback. Following this informal stage, should the applicant wish to formalise the appeal, then their written formal appeal is submitted to the grants committee along with a report from grants staff. The Grants Committee reconsider the decision and then instruct grants staff to inform the applicant of the outcome. There is no appeal following this process.

10. Decision Making & Governance

The Board of Trustees have devolved the responsibility for grant making to the Foundation's Grants Committee. In order to ensure that there is always Board representation the Committee membership must include Trustees from whom the Chair and Vice Chair/s are elected. This structure is laid out in the Grants Committee Terms of Reference. The Grants Committee has responsibility for the funding of projects and individuals as described in this policy.

10.i Governance Process

- Decisions are ratified at Grants Committee meetings and listings submitted to the Board.
- All awards of over £250 require Grants Committee involvement usually by e-conference.
- All awards of over £10,000 require consideration by grants committee or a nominated subgroup.
- Managed programme decisions are made at relevant panel meetings, which may be an external panel. A schedule of decisions is signed by the Panel Chair.
- Development of submissions for managed programmes valued at over £50,000 will be subject to Trustee involvement.
- The Foundation's Grants Committee may provide a decision making service for managed programmes.
- Donors' decisions are verified by e-conference and ratified by the Grants Committee.
- Decisions on funding individuals, for applications of £250 or less, are made by a Grants Officer, Grants Manager or other senior staff member.
- Decisions on the external distribution of funding to individuals by other agencies are by e-conference and ratified at the Grants Committee.
- All awards are listed for ratification purposes at the next meeting of the Grants Committee.
- All awards are listed and submitted to the Board.
- A list of groups eligible for funding through Local Giving .Com will be approved by the Grants Committee. The list of approved groups will be submitted to the Board.
- A list groups receiving funding through Local Giving. Com will be provided to the Grants Committee for ratification purposes and submitted to the Board.
- Grants Committee minutes and statistical information is provided to the Board.

10.ii Financial Safeguards

All projects funded by the Foundation are to constituted organisations with management committees and accounting systems at a level proportionate to the funded project. Funded groups are required to ensure that cheques are signed by two unrelated members of the management committee. Applications for projects over £5000 are awarded subject to a satisfactory reference.

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All grants cheques over £250 issued by the Foundation are signed by two signatories, one of whom is a Trustee. Two members of Foundation staff, not directly involved in grant making, can sign grants cheques of less than £250.

Payments to projects of over £10,000 may be subject to staged payments and proportionate monitoring including monitoring visits during the project.

10.iii Allocating finance to funds

The Foundation's Grants Committee is allocated funding for grants on an annual basis by the Finance Committee. The Grants Committee then makes the decision about what proportion of funding to allocate to programmes taking into account donors requirements, consultation and notable trends.

Funding allocation from Donor funds is calculated annually in December for the following financial year.

10.iv Grants Strategy Development

The Foundation's strategy for grant making is reviewed annually in the light of notable trends in grant making and using information from consultative events. At least one consultation event will be held annually bringing together the full range of Foundation stakeholders.

A Grants Strategy Sub Group made up of Grants Committee members and Trustees considers a strategy discussion document which includes information about funding available for the following year and the results of consultation and a review of grant making trends.

A review of grant making may be produced to provide comprehensive information on grant making in the previous year and used to inform the Grants Strategy Sub Group.

Following the meeting of the Sub Group a proposal detailing their recommendations is submitted to the Grants Committee for their agreement annually in April.

Following agreement of the proposal and any amendments requested by the Grants Committee the changes in the proposal are incorporated into a new Grants Policy and submitted to the Board of Trustees for their approval annually in May.

Policy review will cover at least the consideration of the following principles: -

- Donor requirements
- Managed programmes
- Available funding
- Types of support
- Consultation with stakeholders
- Eligibility
- Size and duration of funding
- Governance and process

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10.v Monitoring & Evaluation

The Foundation is keen to establish a relationship with funded groups. Groups funded receive a monitoring and evaluation form to demonstrate the effectiveness of the grant. The Foundation will ask for monies to be returned if, for any reason, the group is unable to use the grant for its original, defined purpose (unless alternative conditions have been subsequently agreed). Groups not returning their monitoring and evaluation form **will not** normally be considered for any future funding unless the Foundation's Grants Committee give permission.

Groups are asked to submit original receipts and invoices with the monitoring and evaluation form. The receipts and invoices are stamped with the Foundation's logo and returned to the applicant.

Groups are expected to report Foundation awards in annual reports, accounts and newsletters or any other appropriate publications.

Selected funded groups are invited to speak to the Foundation's Grants Committee as part of the monitoring and evaluation process. All successful projects are invited to attend consultation events.

10.vi Access and Equality of Opportunity

The Foundation aims to ensure that its grants processes are accessible to all who may be eligible. Where voluntary or community groups face barriers and problems in completing the application form or taking part in the application process, relevant support will be either signposted, resourced or provided.

10.vii Promotion & Advertising

The Foundation promotes its grant making through local media, its website and voluntary sector networks. Its aim is to ensure that applicants have reasonable notice of available funding.

Major new programmes providing grants outside of the Foundation's Main Programme of grant making will be publicised through appropriate media giving a minimum of four weeks notice of the deadline for applications, although we would aim to give twelve weeks notice of opportunities for funding.

The Foundation includes details about funded projects in its publications, possibly including photographs.

The Foundation expects funded groups to ensure that their award is promoted through their own efforts, including events and publications.

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10.viii Operating Standards

The Foundation aims to ensure that it meets the highest standard of service to grant recipients and donors. In order to do this the Foundation: -

- Adopted 'The Grant Applicants' Charter' (available on request)
- Signed the Calderdale Compact (www.calderdale.gov.uk)
- Holds a Community Foundation Network accreditation quality mark

10.ix Information management & data protection

The Foundation records all applicants' information on a specialist database. Detailed records of applicant groups, outside of information in the public domain, are confidential. Where it is in the interest of the applicant, contact details will be passed to organisations that would be able to support them. The following sentence is used in correspondence with applicants to inform them of this: -

It is very important to us that you are aware of every opportunity to help your organisation achieve its aim. We will therefore give other funders, community training organisations and infrastructure development organisations the contact details of your group so that you can benefit from new opportunities. We will not give or sell your contact details to any marketing or selling companies.