

Grant Making Policy

1. Purpose

- 1.1. The purpose of this policy is to set out the principles, criteria and processes that govern how J T Blair's Charity makes grants.
- 1.2. A grant is defined as a financial award the charity makes from its funds to support charitable activities, usually to registered charities or charitable community groups, but sometimes to other bodies.

2. Introduction

- 2.1. J T Blair's Charity is a registered charity (number 221248). Its charitable object is "For the benefit of poor persons (and particularly of the aged poor) in Manchester and Salford in such a way as the trustees consider most advantageous to the recipients." It is governed by a Board of Trustees and the day-to-day running of the charity is delegated to the Secretary to the Trustees.
- 2.2. The trustees ensure proper governance of the Trust's grant-making in three ways.
 - Through published **grant-making criteria** which set out the activities the trustees wish to support in furtherance of the charitable objectives. The criteria also include activities which the trustees do not wish to support because they do not consider them to be in line with the charity's purpose. The trustees accept that they will on some occasions make grants outside published criteria but that in all such cases the activity supported will be charitable in law.
 - Through **grant-making principles** which ensure that, even where there is donor or funding partner involvement, decisions are ultimately made by J T Blair's Charity trustees.
 - Through **grant-making processes** which set out how decisions are reached for awarding grants at the Trust.

3. Grant-making principles

- 3.1. The principles which underpin the trustees' governance of the charity's grant-making take into account the scale and range of its grants and strike a balance between proper oversight of decision-making and responsive customer service for applicants.
- 3.2. The principles are as follows.
 - The Board of trustees has ultimate collective responsibility for all grant-making decisions in line with the charitable purposes of J T Blair's Charity.
 - Trustees reserve the right to apply conditions to any grant.
 - Trustees also reserve the right not to approve any recommendation if they determine that the resulting grant would not be charitable, or would conflict

with the Trust's stated policies or damage its reputation.

4. Grant-making criteria

- 4.1. J T Blair's Charity's published guidance on criteria for applications from individuals and groups is set out in Appendix 1 of this policy. Trustees are particularly keen to help small-sized voluntary organisations in the primary area of benefit (Manchester and Salford).
- 4.2. J T Blair's Charity does not make grants to individuals.
- 4.3. As a registered charity, J T Blair's Charity can only make grants to support activity which is charitable in law. Organisations do not have to be registered charities to apply. All grants made are usually of a restricted nature and can only be used for the purpose given.
- 4.4. Trustees are mindful of the regulation and focus of Community Interest Companies (CICs) and other non-charity social enterprises. The charity's approach is to consider helping such organisations, where the activities of the organisation can be seen to further the charitable object of J T Blair's Charity.
- 4.5. Trustees will consider both one-off grants and multi-year grants¹.
- 4.6. Trustees expect that grants will normally support services and activities such as:
 - Trips/Outings
 - Activity/Skills Programmes
 - Reduction of Social Isolation
 - Inclusion in Community
- 4.7. Applications for support must be made in on the charities grant application form and sent, via email, to the Secretary.
- 4.8. Grant requests which the trustees will not normally support are:
 - Charities/organisations based outside of the geographical area detailed above
 - Charities/organisations whose clients are not classified as older people
 - Salaries/Staff or volunteer expenses
 - Purchase of IT equipment for the use of staff/volunteers
 - Contributions to general appeals or circulars.
 - Religious activity which is not for wider public benefit.
 - Public bodies to carry out their statutory obligations.
 - Activities which have already taken place.
 - Grant-making by other organisations.
 - Privately owned and profit-distributing companies or limited partnerships.
- 4.9. To ensure J T Blair's Charity resources are used solely to further its charitable objectives, and it can report on the impact of grants, trustees normally expect that all grants will have one to three measurable objectives agreed at the beginning of the funding period as part of the grant offer.

¹ See section 6 - Reporting

4.10. There is no minimum grant but grants above £2,000 will not normally be considered.

5. Grant-making processes

5.1. Trustees aim for J T Blair's grant-making processes to be transparent and to address the interests of applicants. To this end, all eligible external grant requests go through a two-stage process as follows:

- **Review and assessment** to determine whether the request should be shortlisted for support. Requests not shortlisted are rejected.
- **Ratification** of the recommendation by the Board or a person/committee acting with its delegated authority.

In addition to responding to external grant requests, the Trustees may at their discretion invite or commission proposals, or provide funding in collaboration with others where doing so would meet J T Blair's charity's strategy and priorities.

5.2. All grants will be approved by the Trustees.

6. Reporting Requirements

6.1. All awardees must provide a brief report to the Trustees. This should be sent to the Secretary 12 months after the grant was approved. The report must address the purpose of the funds given, what you did with the money and how this benefitted your members/clients.

7. Variations to this policy

7.1. The Board of trustees may vary the terms of this policy from time to time.

Appendix 1: Grant Application Guidelines

Please read these guidelines before completing the form

The purpose of the James Thomas Blair Charity is to provide support to older people living in Manchester and Salford.

Who may apply?

Any registered charities or voluntary organisations providing assistance to older people who live within the 32 wards of Manchester or 20 wards of Salford.

What do we support?

- Trips/Outings
- Activity/Skills Programmes
- Reduction of Social Isolation
- Inclusion in Community

The above list is not exhaustive – any services which benefit the lives of older people will be considered.

What do we not support?

- Charities/organisations based outside of the geographical area detailed above
- Charities/organisations whose clients are not classified as older people
- Core staff salaries or volunteer expenses
- Purchase of IT equipment for the use of staff/volunteers
- Grants in excess of £2,000 will not normally be considered
- Trustees will not fund projects retrospectively
- Organisations with annual income in excess of £100,000

Completing the Application Form

A copy of the grant application form can be found on our website here. Please ensure ALL sections of the form are completed and the form is signed by the lead applicant.

Details of the Organisation

Please ensure that the full details are completed and provide additional information is required.

Finance Section

Please complete all the sections. The income and expenditure figures should be those for the last financial year.

Overall Purpose of your Organisation

In no more than 300 words please describe your organisations aims and objectives.

Grant Request Section

Please take your time to complete this section as this provides the Trustees with the most important information in helping them to reach an informed decision. Trustees do not need a full history, so briefly summarise your current work and how it meets people's needs today.

Make sure you give full details of the costs of the work you are seeking funding for.

If you have asked for part-funding for your project you must explain from where other funding has been secured.

Any discrepancies in your financial breakdowns could result in a rejected request so please ensure all details are accurate.

Statistics Section

- Explain in detail how many people will benefit directly from this grant.
- Give details of your staff and volunteering resources.

What Happens Next

- Check the application form is complete and then (e)sign and date it. **Incomplete forms will be returned.**
- Email your application and supporting documents to **jtblairs@gmail.com**
- All information contained in your application is treated as confidential. However, it should be pointed out that the information will be shared electronically with all the Trustees.
- The application form will be reviewed by the Trustees at their next meeting. See dates section on website.
- Following the Trustee meeting the Secretary will write to you with the outcome of your application.
- The Trustees' decision is final.

If you are successful

- You will be required to verify your bank details to enable the charity to make a payment directly into the organisations bank account.
- You are responsible for ensuring the award is only used for the purpose agreed by the Trustees.
- Your organisation may use the Trust's Name in its publicity material by way of acknowledgment for the support it has received.
- The Trustees may wish to visit your project. If this is the case then they will be in contact to arrange a mutually convenient day and time.
- To ensure that you will qualify for a future application we will require, within the 12-month period of this grant being made, a brief report explaining what you did with the money and how this benefitted your members/clients.

If you are unsuccessful

Repeat applications will not be considered within a period of 12 months following the original submission