

Grant-making Policy

Contents

Contents	1
1. Context.....	1
2. Publicising Kent Community Foundation Funds.....	2
3. Standard Application and Assessment Process.....	2
3.1 Applications for organisational grants	3
3.2 Applications for individual grants.....	4
4. Grant Awards Decision-making and Approval Process.....	5
4.1 Discretionary organisational grants	5
4.2 Individual grants	6
4.3 Donor-directed organisational grants.....	6
4.4 Donor-directed individual grants.....	7
5. Impact	7
5.1 Organisational grants.....	7
5.2 Individual grants	7
6. Complaints Procedure.....	7
7. Data Protection	7
8. Review	8

1. Context

The philosophy of Kent Community Foundation (Kent Community Foundation) is to give fund-holders a high level of control over how, where and when their fund is spent, within the bounds



of our charitable objects. Kent Community Foundation plays an important role informing fund-holders and potential fund-holders about the priority needs of communities in Kent and Medway, but our intention is to guide, informed by our corporate knowledge & needs analysis, not dictate. Many of Kent Community Foundation's current funds are donor-advised and tightly defined in terms of beneficiaries, purpose of grant and/or geography. About one third of Kent Community Foundation's funds are unrestricted discretionary funds and we actively seek to grow these.

Most Kent Community Foundation grants follow our standard application and assessment process as set out below. However, there are exceptions, such as donor-directed grants/donations. This policy sets out how the trustees, via the Grants Committee, oversee the approval of all grants including donor-directed grants. It expands upon the "Role of Grants Committee" overview from July 24.

2. Publicising Kent Community Foundation Funds

Providing a steady flow of relevant grant applications that meet the grant-making criteria and decision-making schedule of all our funds is an important priority for Kent Community Foundation. We consider which funds need proactive publicity and outreach and agree the promotion priorities for the upcoming panels. We consider seldom heard groups and our needs analysis work and devise strategies to attract a broad range of applications. There is significant diversity in the county, and Kent Community Foundation makes particular effort to market our service to all communities.

3. Standard Application and Assessment Process

We have three main "routes to funding" – micro, general and annual. These are clearly defined on our website alongside our screening "eligibility checker" which informs all potential applicants of our core requirements. With limited funding available to distribute as grants, we are careful to ensure that hard-pressed organisations do not waste time on complicated application processes.

Although our application process is an online process, it remains important to be open and accessible to a broad range of people and projects and we are particularly aware of seldom heard groups. Applicants with additional need are offered help completing the application form, including those with disabilities and those for whom English is an additional language.

3.1 Applications for organisational grants

Each application goes through two levels of checks – initial due diligence & detailed assessment.

Areas for due diligence include:

- Is the group properly constituted with appropriate governance?
- If they are a registered charity, are Charity Commission returns up-to-date?
- Review of up-to-date financial accounts and reserve position
- Relevant policies are confirmed in place (e.g. safeguarding, financial procedures)

Areas for assessment include:

- Strength of the project meeting a genuine need
- Organisational capacity – track record, resources, experience etc
- Financial strength and sustainability
- Anticipated outcomes/impact and how it will be measured
- Realistic budget/timescales etc

If a charity has had a previous annual income of over £5,000 and should therefore be registered with the Charity Commission we will advise them to do so, giving them advice about how to register. Kent Community Foundation will offer this support and process a grant in the first instance, if the charity applies again and still has not registered, Kent Community Foundation will regret the application until charity registration is complete.

Assessors refer to the 'Assessment Toolkit' to ensure a standard and fair assessment of all grants. To ensure consistency, RAG ratings are used. The applicant will be asked to provide further information or clarification, as necessary. We try, whenever possible, to meet first time applicants face to face, this visit informs the assessment process. We also, when needed, put significant resource into working with applicants to improve their requests. We recognise that



many small charities do not have professional fundraisers and take that into account during assessment. Applications are presented to panels in a consistent manner, focusing on quality of the organisation/project rather than the finesse of the request.

Wherever possible we operate a “one form fits all” policy, so will take an application to as many panels as we would think would be interested in it, so maximising the chance of funding.

Applicants can usually only submit one application every six months. We aim to get decisions back to applicants within three months of due diligence being completed.

3.2 Applications for individual grants

Applications for individuals or families are referred to as ‘nominations’. Applicants complete an ‘individual nomination’ form.

Nominations for individuals or families are only accepted from a professional (e.g. doctor/support worker/social worker/occupational therapist) who knows the individual’s situation in a professional capacity. Applications directly from individuals will not be considered.

Nominating professionals are specifically asked to confirm the needs of the individual, how the request meets the need and the financial situation of the beneficiary, with particular emphasis on why they cannot afford the cost without assistance.

Upon submission the nominated individual/family declaration must be completed by an individual (if over 18) or a parent/guardian/carer if they lack capacity. We can also accept this as a verbal consent, if a nominator has gone through the form with the individual/family and received verbal consent – the nominator then emails Kent Community Foundation to confirm and this confirmation is attached to the application.

- The declaration confirms the following:
- The information provided by the nominee is true and accurate
- They confirm that the request meets their needs
- They confirm the information may be held on Kent Community Foundation’s database
- That they understand that the information will be shared with the panel(s) considering the application (covering both verbal and written format)

Kent Community Foundation Charity Number: 1084361 Company Number: 4088589

Registered Address: Park Barn, Evegate Business Park, Ashford, TN25 6SX Registered in England and Wales



Until beneficiary confirmation is received Kent Community Foundation will not import information to its database, with the exception of where there is an immediate time-sensitive situation or the applicant lacks the capacity to confirm the information.

Kent Community Foundation will retain personal information relevant to the grant on its database for six years from the date of application.

4. Grant Awards Decision-making and Approval Process

4.1 Discretionary organisational grants

About one third of our funds are discretionary, so decision-making rests with Kent Community Foundation. For grants that have been through our standard grant application/assessment process, the trustees delegate authority to the grants' team to approve grants except when –

- The grant is to a grantee Kent Community Foundation has not previously funded
- The grant value is £7K and over
- The application assessment has two amber flags

In these situations, Grants Committee will retain decision-making authority at their quarterly meetings.

The remaining two-thirds of our funds are not discretionary – i.e. our fund-holders retain decision-making power. Here, the grant has been approved by the relevant fund-holder, their representative or panel.

With all grants, the staff team are satisfied with the due diligence and that the grant will be used for purposes that fall within Kent Community Foundation's charitable objects.

A complete list of grants paid (organisational and individual, and donor-directed) is presented quarterly to Grants Committee for retrospective approval/oversight.

Volunteers who sit on panels are appropriately skilled to make decisions on behalf of the fund and have declared any relevant conflicts of interest prior to grant decisions. When possible Kent



Community Foundation will include those with lived experience of issues being addressed in decision-making.

4.2 Individual grants

Grants will be approved in accordance with the signed fund agreement. All grants are retrospectively approved quarterly by the Grants Committee.

Kent Community Foundation will provide only the first name of an applicant to the panel/donor, with a surname initial. Location is only disclosed if particularly relevant.

In the first instance, grant payments will be made to the nominating charity to purchase items/services on the awardee's behalf. If this is not possible, Kent Community Foundation will pay the supplier direct for the items/services if an invoice and BACS details can be provided. Very occasionally a gift card or voucher for the full amount of the award can be issued to the individual/family, in accordance with Kent Community Foundation's own financial procedures.

4.3 Donor-directed organisational grants

Kent Community Foundation does allow donors and fund-holders, in certain circumstances, to recommend donor-directed grants, including grants outside of Kent and Medway. However, the trustees are ultimately responsible for ensuring that all expenditure is used to further Kent Community Foundation's broad charitable objects and have agreed the following protocols for donor-directed grants. These are usually general donations that do not require an application form.

Firstly, the grants' team will carry out due diligence to demonstrate that:

- The organisation is properly constituted
- The grant falls within Kent Community Foundation's broad charitable objects
- There is no direct or indirect benefit back to the fund-holder/donor
- The recipients annual accounts are up to date.
- The charity has a bank account in its name and Kent Community Foundation have had sight of a bank statement

Kent Community Foundation Charity Number: 1084361 Company Number: 4088589

Registered Address: Park Barn, Evegate Business Park, Ashford, TN25 6SX Registered in England and Wales



4.4 Donor-directed individual grants

On occasion a donor will identify an individual in need of financial assistance and request help is provided via their fund. Where possible the above nomination process will apply (see section 3.2), with donors encouraged to have the beneficiary seek a suitable nominator.

5. Impact

5.1 Organisational grants

During the application process, groups will be asked to describe how they will evaluate the impact of their project and how they will share this with Kent Community Foundation. At the time of the award, this requirement will be highlighted to successful applicants as an important condition of the grant. In addition, all applicants will be required to share with us evidence of impact. Feedback will be presented to our donors/fund holders annually, often in a grant making/impact report.

5.2 Individual grants

The nominator will be asked for brief feedback on the impact of the grant on the individual/family.

Any feedback (e.g. letter of thanks) will have the individuals personal details (name and address) removed before it is forwarded to any third party.

6. Complaints Procedure

Grantees have the right to submit complaints and appeal grants decisions within the guidance of Kent Community Foundation's Complaints procedure.

7. Data Protection

Grants are processed in line with Kent Community Foundation's data protection policy and all grant applicants are provided with a link to our privacy policy, detailing how we use their data and their rights.



We do not share personal details of grant applicants or beneficiaries to any third parties without their prior approval. Consent is obtained for use of photos and case studies by Kent Community Foundation or in any outside publicity.

8. Review

The effectiveness of this policy and associated arrangements will be reviewed every two years by the Grants Committee and approved by the Board of Trustees.

Grant-making Policy	
Status	Approved
Author(s)	
Approved by	Grants Committee/Board of Trustees
Date	03/09/2024 / 29/11/2024
Due to be reviewed	September 2026