



Parry Family Charitable Foundation®

Grant Process ©

23 August 2018

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Date of constitution: 24 October 2014

Charity registered in England and Wales No. 1159701

www.parrycharity.co.uk

1. Overview

- Our Strategy & Policy sets out the framework of what we are about. Useful information on how to make a successful grant application can be found on our web site. We also list on our web site grants we have made which help understand what we support and what we are about.
- Our annual grant budget is set by the trustees and comprises:
 - Main Grant Fund
 - Small Grant Fund (maximum individual grant applies)
- The current position concerning grant budgets, applications and available funds is posted on our web site.
- Trustees are active in identifying projects which resonate with our aims and culture but suitable charities and not for profit organisations are invited to make applications subject to our criteria and conditions.
- Our aim is to build long-term relationships with charities and play a part in helping them achieve their objectives. Working together will enable both the Foundation and the charities we support to plan better and improve the quality and impact of projects and proposals. We do not see ourselves as merely a provider of funding but a partner with other charities that can help them deliver their services. We have often been used by a charity as a “fresh set of eyes” looking at the challenges they face.
- We focus our support through three grant hubs
 - Partner Charity Hub
 - Homeless Hub
 - Community Hub
- This openness about our grant approach and activities is to reassure supporters that their donations are having an impact and by evidencing value for money. It will also help other charities thinking of applying for a grant to understand what we are about.
- Charities looking for unconditional grant support should look elsewhere. We want to work with charities in a collaborative way and build partnerships.

2. Grant Hubs

- Partner Charities: there is a small group of charities who have been invited to become Partner Charities (PC). The Partner Charities have a close and long term relationship with the Foundation. Meaningful benefits are conferred upon PCs including a dedicated grant budget, a commitment to medium term planning and comfort about future funding. Partner Charities form part of the bedrock of the Foundation and will be in receipt of the significant share of our annual grant budgets over the long term. There is no fixed number of PCs but inclusion is all about value for money, great delivery, impact and strong relationships. We want to foster more long term relationships to broaden the reach of our support.
- Homeless Hub: tackling homelessness in the UK is a major challenge. Our hub will be populated by dedicated homeless charities with a local focus. There is no fixed number of charities and our aim is to support charities working in cities, towns and rural communities. Having a proven track record and a range of well-run programmes will be essential elements.
- Community Hub: embracing a group of small local charities with a dedicated purpose that helps improve the lives of people in their communities. Often run by volunteers with low operating costs and the majority of their funds meeting the direct cost of helping people in need and relieving poverty.

3. Process Outline

- There is a two-stage process.
 - An initial enquiry to explore at top level whether there is a match. If acceptable it goes to
 - A formal application
- Potential applicants are advised to consult our web site to validate whether the organisation and grant proposal meet our objectives and criteria before making an enquiry or application. Our web site will help you understand what we are looking for in both who should apply and the type of grant we support.
- Initial enquiries may be submitted by suitable charities and not for profit organisations via our web site (preferred route), by email or post (as a last resort). Trustees will then invite the organisation to

make an application if they and their project broadly satisfy our objectives.

- We only consider Main Grant applications for discrete projects and do not make grants for general funding. A discrete project could be something that has an extended time frame and may require stage payments but equally it could be a one-off cost such as the purchase of equipment. Such grants could be part of a big project or programme being undertaken.
- For Small Grants we accept a broader range of proposals than for a main grant including small scale projects and partial funding of a bigger initiative or programme. Grants for general funding are not ruled out but will be the exception. We often use Small Grants with a new contact to gain experience of working together.
- All applications will be championed by a trustee and considered by the board of trustees for approval at regular trustee meetings or if urgent as they arise. Our target is to let the applicant know our decision within 4 weeks of receiving a complete and valid application.
- The Trustee Champion (TC) will work with the organisation to evaluate the application for both Main and Small grants using an appraisal check list.
- It is important that any grant made by the Foundation is complemented by a robust communications plan to get the message out particularly to the public at large and our supporters (see section 8).

4. Grant Application

- Having been invited to proceed to making an application we will send you a form by email for completion which should be submitted with supporting documents. We prefer that this phase of the application is undertaken electronically.
- Details of the applicant including:
 - Who they are and how they are regulated
 - What they are about – objectives, policy and approach
 - Track record and reputation

See section 6 for more information.

- The application embraces:
 - Outline of the Project

- nature of the project
- description
- target beneficiaries
- benefits
- Grant proposal benefit analysis
- Detailed business plan/financials for the project
- Risk analysis for delivery of the proposal
- Appointment of key charity contact
- How progress will be reported
- How post completion activity and impact will be reported

5. Application Forms

- There are four application forms:
 - Main Grants – comprehensive form
 - Small Grants – shorter form
 - Partner Charity Grants – shortened Main Grant form allowing for the information and understanding we already have of the applicant
 - Homeless Hub Grants
- Application forms are not available on our website but will be sent out following a successful initial enquiry.
- Where we have previous experience with an applicant, the forms will be pre-populated where appropriate.

6. Evaluation of Organisations Supported

In addition to the outline of organisations, we support that can be found on our site, below is a summary of information we need.

- Current and previous years' annual reports and accounts. In particular we see as key financials:
 - Track record of raising income and committing a significant proportion to charitable activities
 - Composition of your income. How dependent are you on public sector funding, for example. How much do you raise from trading? Do you have investments or an endowment fund?
 - Level of reserves to sustain the charity as a going concern
 - Level of cash balances and reserves that may indicate that the charity is well endowed and could meet the grant costs out of their own resources but equally there are sufficient reserves to

underpin the robustness of the organisation to continue as a going concern.

- Running costs demonstrating a high degree of efficiency. Salary levels generally but those of the top paid executives is of interest.
 - Assurance that the charity is competent with a proven track record to deliver. Examples of previous project/grant-based work demonstrating value for money, good measurable outcomes and efficient management of the work.
 - Contact person with full contact details
 - Details about the nature and purpose of your charity.
 - What are your objectives?
 - Where do you operate?
 - What is the scope of your work?
 - Who benefits from your undertaking?
 - Registered Charities details
 - Proof of registration e.g. registration number.
 - Exempt Status Charities & Not for Profit Organisations details
 - Evidence of status
- plus, for not for profit organisations
- Constitution and rules
 - Testimonials
- For UK registered charities some of the information will be available on the relevant Charity Commission's site and if this is the case the applicant should flag this up and supply the links.

7. Evaluation of the Grant Application

- The guiding principle is that our grants should make a discernible difference with tangible and, in most cases, measurable outcomes and impact.
- Meet our **Strategy & Policy** objectives and both the project and applicant are a good match with our culture and objectives.
- Documentation, costings, appraisal and business plan supporting the grant proposal (as appropriate). Lower level of support information would apply for a Small Grant application.
- For single event applications e.g. purchase of kit, competitive quotations with a broad indication of timing are needed. For Main

Grants embracing a larger scale project details of the arrangements for project progress reporting, completion and post-completion evaluation (as appropriate) would also be needed.

- Value for money is an important consideration. In evaluating this factor, the track record of the organisation would be taken into account together with both the quality of the business case/ financial appraisal, competitive quotations and the project monitoring procedures. Grants are made according to the:
 - Availability of funds
 - Worthiness of the cause
 - Quality of the business/financial case
 - Degree of confidence in the delivery of the intended outcomes.
 - Each application is treated on its merits but, when relevant, also against other competing proposals
 - One-off grants are the norm but in exceptional cases multi-year proposals can be considered
- Our Grant Hubs are treated as priorities in grant approval.

8. Communications

- It is important that we get the message out particularly to the public at large about what we are doing, the projects and programmes we are supporting and who we are working with in partnership. Use of a full array of communication channels are open to us. We would agree with a successful applicant how this would be delivered.
- Blogs posted on our site are an effective way of keeping the public as well as supporters and other charities informed about what we are doing together and how individual grants are making a difference. We would ask charities to write a blog about their grant and how the project would have an impact. This initial blog would be supplemented by other blogs keeping us and the public informed about progress and what is being planned. The primary objective of the blogs is to inform the public at large about how we are working together to make a difference. They are not “thank you” communication for the Foundation helping individual charities. Occasionally we would invite a charity to produce a blog that is aimed at informing the public about their charitable focus and activities. There is a blog guidance note which is sent with every successful grant application.

- We promote charities we support on the Foundation's site with links back to their sites. We expect a reciprocal arrangement.
- We like to see our support of charities is suitably acknowledged. We believe this is important to demonstrate to our supporters that their donations have been well spent and are making a difference. It also underpins the collaboration between applicants and our Foundation and encourages others.
- Some of the ways that our support can be acknowledged are:
 - On applicant's web site. Foundation puts great store by this approach.
 - Donors/ "friends of"/ supporters boards
 - Applicant's Trustees Annual Report
 - Press releases
 - Social media