

Anson Trust Grant-making Policy

This policy is personal to the Anson Trust, is only intended for the Anson Trust's use and the Anson Trust shall not be responsible for its reproduction or use by anyone other than the Anson Trust.

1. Purpose

- 1.1. This purpose of this policy is to set out the principles, criteria and processes that govern how The Arthur Anson Memorial Trust Limited ("Anson Trust") makes grants and is intended for information purposes only and therefore does not, in any way, infer or confer any legal obligation or performance on the Anson Trust.
- 1.2. A grant is defined as a financial award the Anson Trust makes from its funds to support charitable activities, usually to registered charities or charitable community groups, but also to other community orientated organisations or to individuals that fall within the Anson Trust's charitable objects.

2. Introduction

- 2.1. The Anson Trust is a registered charity (number 1107174) and limited company (number 05151340) benefiting communities in and around Marcham. It is governed and run by a Board of Trustees ("Trustees").
- 2.2. Trustees must adhere to the Anson Trust's prevailing Memorandum and Articles of Association and are under a duty to further the Anson Trust's charitable objects:
 - 2.2.1. the provision and maintenance of facilities, amenities and services for use by the inhabitants of the Parish of Marcham and its neighbourhood ("Area of Benefit") for such purposes as shall be exclusively charitable including (but not limited to):
 - 2.2.1.1. the advancement of religion by the holding of religious meetings or services in connection with the Church of England;
 - 2.2.1.2. the holding of meetings (other than political meetings), lectures, classes and other forms of recreation and leisure-time occupation with the object, in the interests of recreation and leisure of improving the conditions of life for the inhabitants.
 - 2.2.2. the relief of persons resident in the Area of Benefit who are in need, hardship or distress. The Trustees may relieve such persons by:
 - 2.2.2.1. making grants of money to them; or
 - 2.2.2.2. providing or paying for goods, services or facilities for them; or
 - 2.2.2.3. making grants of money to other persons or bodies who provide goods, services or facilities to those in need.
- 2.3. The Trustees ensure proper governance in three ways:
 - 2.3.1. **Grant-making principles** – these ensure that decisions are ultimately made by the Trustees in accordance with the objectives above. Grants given are from the Anson Trust's assets and must be restricted to their approved use (see 3. below).
 - 2.3.2. **Grant-making criteria** – these ensure that the activities the Trustees wish to support are in furtherance of the Anson Trust's 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 Anson Trust's charitable objectives. The Trustees accept that they may on some occasions make grants outside published criteria but that in all such cases the activity supported will be seen as charitable in law (see 4. below).

- 2.3.3. **Grant-making processes** – these set out how decisions are reached for awarding grants from the Anson Trust (see 5. below).

3. Grant-making Principles

- 3.1. The grant-making principles seek to quantify the scale and range of the Anson Trust's grants and strike a balance between available resources and the needs of potential beneficiaries.
- 3.2. The principles are as follows:
- 3.2.1. The Board of Trustees has ultimate collective responsibility for all grant-making decisions in line with the Anson Trust's charitable objectives (see 2.2. above) and its prevailing and foreseeable financial circumstances.
- 3.2.2. Trustees may assign certain decision-making responsibilities to sub-committees, Board members or staff within its scheme of delegation. Such delegated decisions are subject to scrutiny and review from time to time.
- 3.2.3. Trustees reserve the right to apply conditions to any grant.
- 3.2.4. Trustees also reserve the right not to approve any recommendation or nomination if they (or those acting with their delegated authority) determine that the resulting grant would not meet its charitable objectives; could conflict with the Anson Trust's stated policies; damage its reputation and/or damage its financial position and underlying assets.

4. Grant-making Criteria

- 4.1. The Anson Trust's published guidance on criteria for applications from individuals and groups is set out in Appendix 2 of this policy ("Anson Trust Grant Application Form"). The Anson Trust's goal is to make grants to a wide range of organisations. Trustees are particularly keen to help grassroots community groups and small-to-medium-sized voluntary organisations in the Area of Benefit. While not excluding large UK-wide charities, the Anson Trust normally only makes grants to such organisations where there are strong relationships in the Area of Benefit and the proposal has the potential to achieve a substantial impact or benefit to the Area of Benefit.
- 4.2. As a registered charity, the Anson Trust can only make grants to support activity which is charitable in law. Organisations do not have to be registered charities to apply and the Anson Trust will only make unrestricted grants to registered charities. Grants to other types of organisation or individuals will always be restricted for specific charitable purposes.
- 4.3. Trustees are mindful of the regulation and focus of Community Interest Companies (CICs) and other non-charity social enterprises. The Anson Trust's approach is to consider helping such organisations, where there is a sound business plan with the charitable costs of start-up or expansion and where any remuneration of its officers or staff is commensurate, in the sole opinion of the Trustees, with the nature and complexity of the relevant organisation's activities. The Trust does not normally support CICs and other non-charity social enterprises with the costs of continuing services, which should be financed by the sale of goods and services in line with the governance model they have chosen.
- 4.4. Trustees expect that grants will normally support one or more of the following outcomes:
- 4.4.1. *Community Services & Activities* – helping groups maintain, expand or provide new services/ activities, with an emphasis on quality, effectiveness, inclusion and impact



(for example (but not limit to): community groups, educational establishments, sports clubs).

- 4.4.2. *Stronger Local Organisations* – organisational development rather than the costs of services/activities and strengthening civil society overall (for example (but not limit to): safeguarding training, first aid training, mental health awareness, promotion of diversity and inclusion).
- 4.4.3. *Empowering Individuals* – where the focus is not on services and activities directly but on influencing improvements leading to best practice & policy for all (for example (but not limit to): representation to policy makers, advocacy initiatives).
- 4.5. External applications for support must be made using the Anson Trust's on-line application process.
- 4.6. Grant requests which the Trustees will not normally support are:
 - 4.6.1. Contributions to general appeals or circulars;
 - 4.6.2. Religious activity which is not for wider public benefit;
 - 4.6.3. Public bodies to carry out their statutory obligations;
 - 4.6.4. Activities which solely support animal welfare;
 - 4.6.5. Activities which have already taken place;
 - 4.6.6. Grant-making by other organisations.
 - 4.6.7. Privately owned and/or profit-distributing organisations and businesses.
- 4.7. To ensure the Anson Trust's resources are used solely to further its charitable objectives and in order that they can report on the impact of grants, the Trustees would expect that grants will have one or more measurable objectives. These would be agreed at the beginning of the funding period as part of the grant offer.
- 4.8. The minimum grant in response to a request is £250. There is no upper limit but applicants should be mindful of the Anson Trust's prevailing financial circumstances and the breadth of its charitable objectives.
- 4.9. The Anson Trust will consider favourably those applications that are seeking to match fund the Anson Trust's grant.

5. Grant-making Processes

- 5.1. Trustees aim for the Anson Trust's grant-making processes to be transparent and to address the interests of applicants and community members. Applications can be made at any time. To this end, all grant requests will be considered at each quarterly Anson Trust meeting (*although in the case of applications relating to persons in need, hardship or distress the Anson Trust will endeavour to accelerate the process by convening ad hoc meetings as required*), using a four-stage process as follows:
 - 5.1.1. **Allocation** makes the best use of available funds.
 - 5.1.2. **Assessment of the application** to determine whether the request should be short-listed for support. Requests not shortlisted are rejected.
 - 5.1.3. **Approval** of the short-listed applications by the Trustees. Each Trustee has an equal vote and, in the event of a tie, the Chairperson has the deciding vote. Grants not approved are rejected. The outcome decision will be communicated within two weeks of each Anson Trust meeting.



- 5.1.4. **Verification** of the grant where practicable to ensure that it has been spent in accordance with the conditions under which it was given. This will normally be done personally by two or more Trustees.
 - 5.2. In addition to responding to external grant requests, the Trustees may at their discretion invite or commission proposals, where doing so would meet the Anson Trust's objectives and priorities for its unrestricted and discretionary funds.
 - 5.3. All grants are made at the sole discretion of the Trustees and the decision of the Trustees shall be final subject to the applicant omitting to include, by way of inadvertent oversight, material supportive information that might otherwise have impacted the Trustees' decision and in which case the Trustees will consider a revised application if they, in their sole discretion, deem the additional information relevant and material to the original application.
- 6. Variations to this policy**
- 6.1. The Trustees may vary the terms of this policy from time to time without notice.



APPENDIX 1: GRANT-MAKING CRITERIA FAQs

How do I apply?

Using the Anson Trust Grant Application Form (see website for download)

Who can apply?

Anyone, 18 or over, for requests based locally

Which area do I need to be in to apply?

Marcham and/or its neighbouring hamlets (the Area of Benefit).

What sort of support is available?

Grants will normally be paid via bank transfer (and can be made direct to a supplier if this is deemed appropriate by the Anson Trust) and we welcome matched funding requests where the Anson Trust grant is not the only funding source.

When will I get a decision?

Within two weeks of each quarterly Anson Trust meeting (unless your application is of an urgent nature and the Trustees are able to review it between quarterly meetings).

What will help in the 'Verification' of the grant?

We encourage there to be a shared success story showing how the Anson Trust support has helped, to achieve its objectives. For example, a brief written report with photos or a video showing its impact. If any items are purchased then receipts should be provided also.



APPENDIX 2: APPLICATION FORM

ANSON TRUST GRANT APPLICATION FORM (FINANCIAL REQUESTS ONLY)

The Anson Trust expects that grant requests will meet the requirements of the Anson Trust Grant-making Policy, which is available on our website, and strongly encourages applicants to review this policy before completing this form.

Grant requests which the Anson Trust will not normally support are: 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 solely support animal welfare; Activities which have already taken place; Grant-making by other organisations or privately owned and profit-distributing companies or limited partnerships.

Name of Applicant:	
Address:	
Contact Name for Applicant: (if different from Name of Applicant)	
Phone Number:	
Email Address:	
What is the Purpose of Grant Application?	
Grant Application Amount:	£
What percentage of your total funding requirement does this amount represent?	%
What other sources of funding have been secured? Please provide name(s) of source(s) and amount(s)	



<p>What other sources of funding have been applied for? Please provide name(s) of source(s), amount(s) and statuses of application</p>	
<p>When is the Grant Amount required?</p>	
<p>What is the anticipated duration of the purpose / benefit of the Grant?</p>	
<p>How would you be able to show that the Grant was spent in line with the Purpose of this Application? (for example: receipts, photos, Trustee visit, etc.)</p>	
<p>Should this Grant Application be successful do you consent for the details of the Grant to be made public for the purposes of promoting the Anson Trust's charitable activities? Please be assured that requests for privacy will not preclude your Grant Application from being assessed. (Circle "Y" or "N" as appropriate)</p>	<p>Y / N</p>
<p>Have you applied to the Anson Trust before and, if so, what was the nature and amount(s)?</p>	
<p>If your Grant Application is successful, please confirm how you would like the Grant to be paid: (As well of the Applicant this could also be the details of a supplier or provider of services)</p>	
<p>Name of Recipient:</p>	
<p>Name of Account: (if different)</p>	
<p>Sort Code:</p>	
<p>Account Number:</p>	



Please confirm that you have read, understood and accept the Anson Trust Grant-making Policy that is currently published on the Anson Trust's website (https://ansontrust.org/) by ticking here: (.....)	
Grant Application Form completed by: (Name)	
For and on behalf of: (if applicable)	
Position: (if applicable)	
Date:	

Please submit your Grant Application to us via email at ansontrustinquiries@gmail.com or via post to our registered office at 9 The Farthings, Marcham, Abingdon, OX13 6QD.

Grant Applications are typically reviewed on a quarterly basis by the Anson Trust and decisions communicated within two weeks of the review being completed. However, if your Grant Application is of an urgent nature the Anson Trust will endeavour to review it at the earliest opportunity.