

*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.com

1. Overview

- Our **Strategy & Policy** sets out the framework of what we are about. This and other key documents together with useful information on how to make a successful grant application can be found on our web site (parrycharity.com). We also list on our web site grants we have made which are useful in understanding what we support.
- Our annual grant budget is set by the trustees and comprises:
 - Main Grant Pot
 - Small Grant Pot (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 us 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.

- This openness about our grant approach and activities is to encourage supporters to make donations by demonstrating the impact the Foundation is having on good causes and by evidencing value for money. It will also help other charities thinking of applying for a grant to understand what we are about.

2. Process Outline

- 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 “**What do we fund**” page will help you understand what we are looking for in both who should apply and the type of grant we like to support.
- Initial enquiries may be submitted by suitable charities and not for profit organisations by either email (preferred) or post. Trustees will then invite the organisation to make an application if they and their project satisfy our initial appraisal.
- 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 e.g. creating an audio studio such as our grant to Infosound. Equally it could be a one-off purchase such as the purchase of IT kit for Southside in Bath - see our site for more details.

- There is a two-stage process for a Main Grant.
 - An initial enquiry which if acceptable goes to
 - A formal application
- For Small Grants we accept a broader range of proposals than for a main grant which could include general funding although small scale projects would find favour.
- A trustee will work with the organisation to evaluate the application for both Main and Small grants using an appraisal check list.
- 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.
- It is important that any grant made by the Foundation is properly acknowledged (see section 6).

3. 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.

- 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 contact
 - How progress will be reported
- How post completion activity and impact will be reported

4. 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 like to see.
- 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 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
- Running costs demonstrating a high degree of efficiency. Salary levels generally but those of the top paid executives is of interest.
- Understand 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
 - Proof of registration e.g. registration number.
- Exempt Status Charities & Not for Profit Organisations
 - Evidence of status

- 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.

5. Evaluation of the Grant Application

- The guiding principle is that our grants should make a discernible difference with tangible and, where relevant, 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 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 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

6. Recognition

- 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:
 - Donors/ "friends of"/ supporters boards
 - On applicant's web site

- Social media
- Applicant's Trustees Annual Report
- Press releases
- Blogs posted on our site are a good way of keeping the public as well as supporters and other charities informed about what we are doing and how individual grants are making a difference. Usually, we invite charities to write a blog about their grant and how the project has had an impact. Some charities have penned other blogs keeping us informed about progress and what they are planning.