

Mountsorrel Community Support Fund

Grant Making Policy, Procedure and Terms and Conditions

Introduction

Mountsorrel Community Support Fund [MCSF] is the working name of Mountsorrel Relief in Need Charity, a registered charity no. 217615. MCSF also includes the Charity of Hugh Phipps, no. 217615-1. MCSF is one of three beneficiary charities funded by Mountsorrel United Charities. The charity's vision is to be at the heart of the Mountsorrel community supporting those in hardship. One way of doing this is through individual grants to residents of Mountsorrel.

1. Purpose of Policy

This Policy sets out the context, principles and criteria, processes, and terms and conditions that govern how MCSF makes grants.

2. Who is the Policy for?

This Policy applies to the trustees and Coordinator of MCSF, and is available to anyone applying for a grant.

3. Context

The charity is governed by a board of trustees. The trustees have absolute discretion about how funds are allocated in accordance with the charity's governing document.

The charity is governed by a Charity Scheme, which sets out the legal framework that governs the charity's grant-making. The main object of the charity is to relieve people who live in the Parish of Mountsorrel who are in conditions of need, hardship or distress by providing or paying for items, services or facilities that will reduce their need, hardship or distress.

Grants can also be made to organisations that provide items, services or facilities for people who live in Mountsorrel who are in need, hardship or distress.

The governing document places the following restrictions on all the charity's grant-making:

- The trustees cannot commit to repeat grants or to renew funding;
- Grants can only be made by the trustees as a collective body;
- The grants can't be used to directly pay for charges levied by government or councils, such as rates or taxes, or to replace public funding (e.g. benefits, government grants); but they can supplement any existing help from statutory sources.

The Charity of Hugh Phipps has different requirements. This charity can make grants for the relief of nonconformists who are in financial hardship and who live in Mountsorrel, Thurstaston or Swithland (but with a preference for Mountsorrel). A

nonconformist is defined as a member of a protestant church that dissents from the established Church of England.

Within the framework set out by the Charity Scheme, the MCSF trustees may identify grant-making policies, priorities and criteria to help make the charity's funds go further. This means they might not be able to help everyone. This document tells you about the current grant-making policy and criteria. The trustees' grant-making priorities may vary according to changing local needs, national and global events (such as a pandemic) and the level of funds available.

The Grant-Making Policy should be applied by trustees in conjunction with the charity's other relevant policies, including: Complaints Policy & Procedure; Adult Safeguarding Policy & Procedure; Conflicts of Interest Policy; Equality, Diversity & Inclusion Policy; Health & Safety Policy; Privacy & Data Protection Policy; Risk Management Policy & Risk Register.

4. Principles

The principles which underpin the charity's grant making are as follows:

- The board of trustees has ultimate collective responsibility for all grant-making decisions.
- The trustees reserve the right not to approve any applications that they feel do not meet the charity's aims.
- Trustees reserve the right to apply conditions to any grant.
- Every application is considered on its own merits, in conjunction with information regarding previous applications made by the applicant in the last seven years.
- All applications are subject to the availability of funds.
- When considering applications, trustees should have particular regard to the charity's Conflicts of Interest Policy. Trustees should not vote on any application from a 'connected person' as defined by the Conflicts of Interest Policy.
- The trustees will at all times seek to make best use of the charity's funds by obtaining items at reasonable cost.

5. Criteria

The trustees apply the following criteria to their grant-making in furtherance of the charity's aims:

5.1 Applicants to MCSF must have been living in the parish of Mountsorrel for at least six consecutive months.

In **exceptional cases** the trustees might be able to help someone who lives immediately outside Mountsorrel, or who is temporarily resident in Mountsorrel, but whom the trustees have sufficient reason to treat as if they live within the parish.

Rarely, and only if there are funds remaining after assisting those who live in Mountsorrel, the trustees can make grants to help former residents of the parish who are in need, hardship or distress.

5.2 Eligible individuals can apply to MCSF when they are in need, hardship or distress and are able to demonstrate that the grant they are applying for would improve their situation.

Examples of items or services that might be agreed are in appendix 1.

Applications for grants to organisations should demonstrate that:

- The service applied for will primarily benefit people who live in Mountsorrel. If the service covers a wider area, the applicant organisation must specify what percentage of the people using the service is expected to be people who live in Mountsorrel.
- The service will help people who are in need, hardship or distress.

6. Process

- Trustees aim for the charity's grant-making processes to be transparent. Anyone wishing to apply for a grant should contact the coordinator. Please see the contact details at section 8. Organisations will be sent an application form with instructions on how to apply or may download one from our website – www.mountsorrelcsf.org.uk.

The following process is for individual applications:

- An initial conversation will determine the eligibility of the applicant based on the criteria set out above.
- If eligible the Coordinator of the charity will visit applicants at their home to take information about their household, finances and the need for the grant.

Occasionally an application can be taken over the phone at the discretion of the Coordinator.

- Whilst proof of finances is not always required, it should be made available if requested.
- Applications for decoration or flooring for three or more rooms will require quotations from MCSF's regular suppliers to be provided with the application.
- Trustees meet eight times per year to consider applications, approximately every six weeks. To find out the dates of the meetings please contact the Coordinator.
- At the meeting, the Coordinator will present a report on all the applications received, together with essential information about each applicant to help the trustees make decisions.
- Trustees vote on whether to agree a grant. At least five trustees must agree in order for a grant to be awarded.
- Sometimes trustees will partially award the grant. Occasionally trustees may ask for further information to be presented at the following meeting before making a decision. If the information needed is not received, the trustees may at their discretion refuse the application.
- Applicants are informed of the decision of the trustees by the Coordinator usually within 7 days.
- If the application is successful, items/services will be arranged by the Coordinator and paid for by MCSF directly. (For grants to organisations, a payment schedule will be agreed).
- Feedback is not given to unsuccessful applicants, unless trustees specifically request that this is done.
- Details of trustees' conversations and votes are strictly confidential and will not be discussed outside of the meeting. Trustees are expected to have proper regard for the charity's Privacy & Data Protection Policy at all times.
- Unsuccessful applications may be put forward again at a future meeting only if circumstances surrounding the application, eg. financial or physical/mental health, condition of the item etc. have changed since the first application.
- The trustees' decisions are final and there is no appeal process. If necessary, you can request a copy of the charity's Complaints Policy by contacting the Clerk to the trustees: kate@mountsorrelcsf.org.uk
- Trustees may decide to pause applicants from applying for a specific time period if they feel a dependency on the charity has developed. This would be discussed at a trustees' meeting and the applicant informed.
- Details of applicants and applications are kept securely for seven years so that MCSF is able to show the Charity Commission that all of the funds have been given to people in need and who are eligible for assistance. If you would like to know more about how your data is stored and managed, please contact the Clerk to the trustees to request a copy of the Privacy & Data Protection Policy: kate@mountsorrelcsf.org.uk

7. Interim applications

Occasionally items that are needed urgently before the next meeting may be granted in between meetings.

An 'interim' application can be taken by the Coordinator who then must have agreement from two out of three trustees in order to award a grant. One of the trustees is usually the chair of MCSF. The decision is then reported to the full board of trustees at their next meeting.

As with regular applications the trustees will consider the grant application alongside a list of previous applications made over the last seven years.

If successful the Coordinator will arrange for the item to be provided.

During periods of staff holidays or non-working days, interim applications will not be taken.

8. Contact details

If you would like to apply for a grant, please contact the Coordinator:

Email: info@mountsorrelcsf.org.uk

Tel: 07931 129360

9. Terms and Conditions

- a) Our Coordinator will check that applicants have applied to other major charities or statutory organisations that could supply the items or services that are needed. MCSF cannot provide items or services that can be provided by statutory bodies. Our Coordinator can help with contacting relevant organisations.
- b) All required information must be given in order for the application to be considered.
- c) Applicants must be able to demonstrate that the grant will make a positive difference to them.
- d) Items suitable to a household's needs and size are provided.
- e) Mountsorrel Community Support Fund pays for items and services directly. Applicants are not given money to buy or pay for goods or services.
- f) The trustees will not usually make grants for retrospective costs i.e. things that you have already paid for.
- g) Only items or services agreed in the grant application will be provided. Changes or additions to applications cannot be made after the grant has been agreed. Occasionally minor changes can be agreed at the discretion of the Coordinator and Chair.
- h) Applicants are responsible for ensuring that they communicate with the Coordinator and suppliers to receive goods and services in a timely manner. Cancelling work at late notice, failing to arrange delivery or work with the supplier or Coordinator or failure to be in to receive delivery may result in the grant being cancelled.
- i) Issues with the item or service received must be reported to the Coordinator promptly for these to be resolved.
- j) All items supplied become the property of the applicant, insurance is not supplied, and once any warranty period is over applicants are responsible for any repairs.
- k) Disability aids such as wheelchairs, stairlifts and mobility scooters are the responsibility of the applicant and/or their relatives to dispose of if they are no longer needed.
- l) A grant may be withdrawn if a complaint is made by a supplier, and a pause on being able to apply to MCSF may be put into place.
- m) Grants may not be made to people living in Mountsorrel who know they are moving to another area.
- n) Items agreed can only be delivered and installed to the applicant's address in Mountsorrel.

- o) Applications for regular services like gardening, footcare and Lifeline are taken each year and continuation of the grant is not guaranteed. Agreed applications for gardening services run until the October of that year and a further application would need to be made for the following calendar year. Agreed footcare and Lifeline applications run for one calendar year.
- p) Verbal or physical abuse or harassment towards the charity's trustees, workers or suppliers will not be tolerated under any circumstances and may result in applicants not being permitted to re-apply to MCSF.
- q) MCSF has Safeguarding and Health and Safety policies to keep applicants and staff safe. These are available on request from the Clerk to the trustees: kate@mountsorrelcsf.org.uk

NB: Grants to organisations are subject to different Terms and Conditions. These are supplied with the Application Form for Organisations, or by request to the Coordinator.

Appendix 1

This is a list of items and services that individuals and households could apply for from Mountsorrel Community Support Fund. The list is not exhaustive and it is recommended to contact the coordinator to discuss any item not listed:

Household Items	Regular Services	Financial Support
Sofa	Gardening services	Financial support for debts
Bedframe and/or mattress, bedding	Charnwood Lifeline alarm service	Gas and electricity payments
Essential furniture	Footcare	
Flooring		
Cooker		
Washing machine		
Fridge freezer		
Decoration		
Mobility aids or adaptations		
Essential clothing		

Each individual has different needs, and the Trustees may at their discretion award grants for other items not listed, that will enable an individual to achieve a satisfactory quality of daily life or manage a personal crisis.

However, some items may be considered to be a low priority for assistance. This includes garden fencing.