

The Illum Davis Foundation Grant Funding Policy

(Ver. 01/05/23)

The over-riding concern of the Illum Davis Foundation is to provide support principally by direct contributions to small organisations (annual income below £500,000) for specific and well-defined projects directed to charitable purposes according to the laws of the United Kingdom. Funding will be prioritised for community projects where the greatest number of people will benefit, mainly voluntary organisations and community groups that are addressing outstanding social and/or environmental needs. The charity is happy to support requests for core funding as well as project-based grants and welcomes applications from individuals who are seeking funds to support their local community. The Foundation actively encourages applications from relatively new organisations to help them become established.

Where financial help is given, the Trustees will take steps to satisfy themselves that satisfactory management and organisation exists to ensure that the money is properly used, and, in the case of equipment, that it can be efficiently operated and maintained.

No form of retrospective funding can be considered. Repeat funding requests may be given on receipt of satisfactory progress reports. Applications should be supported by annual accounts where available. Direct replacement of statutory funding or activities that are primarily the responsibility of local or central government are not considered to be qualifying areas for awards by the Trustees. The charity provides grants to institutions which are in the main UK based charities, and whose objectives comply with the charity's objectives. Individual requests for grants, regional projects for national charities regional projects will be considered. Funding is not available for general appeals or to directly promote religious or political agendas.

Each application is considered by the Trustees collectively based on information given in the Illum Davis Foundation grant application form, additional information will be requested when required. If the application is approved, an appropriate donation is determined. Grants will be selected by the trustees with substantial discretion to ensure that the funds will be used for the purposes for which they were intended. The Grants Administrator may arrange to visit or speak in person with potential recipients before or after any grant to establish any anticipated benefit, or to monitor its outcome. Should a grant be approved, evidence of expenditure may be required in due course. The Trust typically provides grants in the range of £2,000 - £5,000 (except in the most exceptional circumstances). Where financial help is sought, the charity will require details of the organisation's own commitment to the particular project. Applications should be supported by annual accounts where available.

It is the intention of the Illum Davis Foundation to keep the application process as simple as possible and the grant co-ordinator will be pleased to discuss any potential application. Grant application forms will be available on request from the website. Beneficiaries will be able to

find the charity, contact details of the grant co-ordinator and application form via the Illum Davis Foundation website. Applications will be considered jointly by the trustees and selected with substantial discretion with regards to both the selection criteria and application to the purposes for which the funds were intended with due diligence according to the Charity Commission criteria. Grants will be issued with acceptance from the applicant of the terms and conditions that the grant is to be used solely as given for purposes detailed in the application form. These conditions will include providing the grant co-ordinator with a report submitted at an agreed date to give expenditure details and an overview of the grant use and its impact. These reports will be monitored by the grant-co-ordinator and fed back to the trustees. Any incidents will be reported to the Charity Commission by the grant co-ordinator.

Changes to the Grant Funding Policy may be done at any time by the Trustees.

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