



STONEHAVEN AND DISTRICT LIONS CLUB (SCIO)

A Scottish Charitable Incorporated Organisation

Grant Making Policy

1. The Objects of Stonehaven and District Lions Club

Under the terms of the Clubs' Constitution, Trustees apply funds at their discretion, making grants where they believe that their contribution will make a real difference. We can only make grants in furtherance of our charitable objects; these details of the Objects of the Club are shown in the Annex to the document.

2. Priorities for Support

The number of applications that can be supported is, of necessity, limited to the amount of funds available for distribution in any one year. The Trustees have determined that the priorities for funding will be:

- Subject to other elements of the Trustees grant-making policy, no restrictions are imposed on the purpose for which a grant may be made; thus, applications for support towards capital projects, other projects or core costs are considered;
- As there are numerous Lions Clubs in the UK, applications from the local 105N district are generally given a priority. Trustees also consider international funding requests referred to them by the Lions International organisation;
- Candidates for support and/or grants are all considered on their own merits, following investigation by the Trustees. However, given that most of the available funds are raised within the local community, those candidates that are local are given special consideration. Using the former as a guiding principle the following are examples of areas adopted for support:
 - Local charities - youth groups, community groups, groups working with the elderly, residential and nursing homes.
 - Youth and children's organisations - sport and community related groups, youth organisations, youth club activities, encourage volunteering.
 - Disadvantaged members of the community – aid for disadvantaged, youth, elderly, homeless individuals and families, and other community projects.

The above priorities in this policy will be reviewed every year when a budget is compiled (or more often if deemed appropriate by the Trustees) and may be changed in accordance with the Trustees' view of the most effective application of available funds at any point in time.

It should be noted that in addition to making grants in accordance with the objects of the club and priorities for support set out above, Stonehaven and District Lions use some of the funds they raise every year to support various events to benefit and serve the community, e.g.

Stonehaven & District Lions Senior Citizens Consort, Stonehaven Feelin' Market, Stonehaven Harbour Festival, Stonehaven Christmas Lights Switch on Event etc.



3. Principles

In awarding grants, the Trustees will apply the following principles:

- Trustees will not normally support applications from any profit-making organisation, large national charities or charities dedicated to issues deemed by the Trustees to be already well funded;
- Trustees will work with other organisations to fund initiatives beyond the financial scope of a single organisation;
- All applications from previous recipients of grants or from previously unsuccessful applicants will be considered by Trustees on their own merits. Although Trustees will have regard to the outcome of the previous grant, any new application will not receive preferential or adverse consideration.

4. Exclusions

4.a The Trustees will not normally approve the use of funds for:

- Purposes for which government has a statutory responsibility to provide.
- Animal charities where the charity is devoted solely to the welfare of animals.

5. Grant Application Process

All applications for grants should be made to, Club Secretary, Stonehaven and District Lions Club, c/o 7 Market Square, Stonehaven, AB39 2BT or e-mail secretary@stonehavenlions.org.uk.

Before awarding a grant to an organisation or an individual, the Trustees require that the applicant should:

- Inform the Trustees of the purpose of the application, details of the project, the way in which the grant will be used and how it will be managed effectively for its intended purpose;
- Provide adequate information regarding the identity and financial status of the recipient and/or of the status of the person(s) who will carry out the project/work;
- All equipment purchased with the grant is owned and remains the property of the grant recipient (whether an organisation or an individual);
- Confirm that any item purchased using a grant will be installed at the place intended for its use;
- On receipt of the grant, either by cheque or through bank transfer, a written acknowledgement of the receipt is to be issued to the Lion Treasurer;
- To comply with the Data Protection Act 2018, applicants are required to consent to the use of personal data supplied by them in the processing and review of their application. This includes transfer to and use by such individuals and organisations as the Trustees deem appropriate. The Trustees require the assurance of the applicant that personal data about any other individual is supplied to the Trustees with his/her consent. At the point of submitting application, applicants are asked to confirm this consent and assurance.



6. Assessment Process

The assessment process will be that:

- All grant applications will be subject to initial assessment to ensure that they meet the basic criteria for funding. Grants will be considered by the Trustees at their meetings and they will aim to inform the applicant of the outcome of their application for funding;
- Trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful, however Trustees do realise the importance of feedback and will where appropriate provide suitable comment to the applicant;
- Applicants should note that Trustees receive far more applications than they have funds to support. Even if a project fits with the criteria and priorities of the Trustees and a detailed assessment has been made, Trustees may still be unable to provide the grant.

7. Monitoring and Publicity

It is the policy of the Trustees to monitor at their discretion, all grants made. Where the grant is for an extended period, project progress should be reported on a regular basis. In addition to reports detailing progress, grant recipients are expected to provide:

- A statement of how the grant monies have been spent, this may be in writing or to take up the opportunity (where appropriate) to visit Trustees to deliver a personal report of how the grant has been spent;
- Details (where appropriate) of other funds applied to the same project;
- Trustees or their representative(s) may, where appropriate, visit the applicant to view the progress/success of the project and see how and where the grant has been spent.

Trustees ask applicants to consent to the use of their information and project details for publicity purposes, including on-line, in print and otherwise.



ANNEX

The Objects of the Club are such purposes as are exclusively charitable in Scotland including in particular:

the advancement of citizenship by:

- Promoting the principles of good citizenship;
- Encouraging members to take an active interest in the civic, cultural, social and moral welfare of the community;
- Providing a forum for the open discussion of all matters of public interest; provided that partisan politics and sectarian religion shall not be debated by members;
- Encouraging service-minded people to serve their community without personal reward and encouraging the promotion of high ethical standards in commerce, industry, professions, public works and private endeavours;
- Supporting youth to develop their skills, capacities and capabilities to enable them to participate in society as mature and responsible individuals;
- Promoting the Voluntary Sector for the public benefit by associating with local authorities in a common effort to advance education and provide facilities in the interests of social welfare for recreation or other leisure time occupation to improve the conditions of life of people in local, national and international communities;
- Promoting volunteering;
- The relief of poverty and the relief of those in need in particular by providing humanitarian aid and disaster relief;
- The advancement of health or the saving of lives by preventing avoidable blindness, assisting disabled people to lead independent lives or helping to prevent or manage health issues;
- Promoting for the benefit of the public the conservation protection and improvement of the physical and natural environment; and/or
- Promoting community participation in healthy recreation.

Nothing in the constitution shall authorise an application of the property of the Club for the purposes which are not charitable in accordance with The Charities and Trustee Investment (Scotland) Act 2005, section 2 of the Charities Act (England and Wales) 2011 and section 2 of the Charities Act (Northern Ireland) 2008.