



## The Pearce Foundation Grant Making Policy

### The Objects of The Pearce Foundation (“the Charity”)

Under the terms of the Charity’s governing document the Trustees apply funds at their discretion:

#### *The Objects of the Charity:*

To provide grants and donations for such charitable purposes, for the public benefit, that are exclusively charitable according to the laws of England and Wales as the trustees may from time to time determine.

The Trustees of the Charity seek to support those activities which help further the Objects.

### **About us**

The Pearce Foundation offers capacity building grants to small, fledgling charities and not-for-profit organisations in Sussex. Under the terms of the governing document the Trustees apply funds to charitable organisations who meet our minimum criteria: operating for two years or less in Sussex and with an income of less than £50,000 a year.

### **Support**

The Pearce Foundation believes in people’s ability to lead their own development and uses a coaching approach to provide support. A variety of bespoke activities are funded by our capacity-building grants which are either paid directly to our Partners, such as for equipment, or paid directly to an external source, such as a training provider.

We focus on “*how*” our Partner organisations operate so that they can grow and develop as efficiently and sustainably as possible so they can focus on “*what*” they do best: supporting their beneficiaries.

Our grant-making process is designed to promote responsible and sustainable growth by providing timely support to our Partners as they take constructive steps in their development.

- **Stage 1: Best Practice (Year 1)**  
Grants of up to £2,000 are awarded to new Partner organisations of the Pearce Foundation.
- **Stage 2: Scaling Up (Year 3)**  
Existing Partners can apply for a further grant of up to £2,000, at least two years after their initial grant when they are ready to take that next step of growth or development.
- **Stage 3: Consolidating (Year 5+)**  
On-going or additional financial support is considered on a case-by-case basis for Partners looking to further develop their capacity and impact.

The Pearce Foundation considers applications from those charitable organisations looking to strengthen their capacity in one or more areas below;

- **Strategy:** Vision, purpose, planning, activities etc..
- **Governance:** Trustees, compliance, policies, risk etc...
- **Fundraising:** Budget, strategy, income streams, reporting etc...
- **Impact:** Measurement, evaluating, reporting, Theory of Change etc...
- **People:** Team, beneficiaries, leadership, volunteers, recruitment, reviews, development etc...
- **Finance:** Accounts, budgets, book-keeping etc...
- **Comms:** Brand, website, social media, newsletters, marketing etc...
- **Operations:** Organisational structure, systems & equipment, service delivery etc...

### **Grant payment**

The Pearce Foundation does not transfer the value of the grant (normally £2000) directly to the Charity Partners (the beneficiaries), rather the Pearce Foundation takes responsibility for the paying training providers or equipment directly to the value of the grant. Grants and bespoke support activities are for up to a period of one year. Funding will be provided on a 'project basis' and is reviewed 6 months after engagement, with the final funding (up to the maximum of £2K ) offered if commitments are honoured.

### **Application process**

There is clear information on the website outlining;

- the application process along with a set of guidelines, eligibility criteria and key deadline dates.
- an online application form which includes questions around how an organisation will use a capacity building grant, how this will help address key challenges, what impact it will have, how this will be evidenced and how this will be reported against. Applicants will need to submit this along with a copy of their most recent annual accounts.
- applications will be considered against a criteria checklist and those shortlisted will be discussed by the Trustees at the Trustees meetings.
- Successful applicants will be informed by writing

### **Systems are put in place to ensure that;**

- potential beneficiaries, whether charities or not-for-profit organisations, are genuine, reliable and competent to carry out the activity being funded.
- the organisation is suitable to work with and will not harm the good reputation of the Pearce Foundation
- the funds will be properly used in line with the Pearce Foundation purposes
- funds will only be used to develop capacity to deliver activities, services or outcomes that fall within the Pearce Foundation purposes for the public benefit (and that any personal benefit will be incidental).

### **Due diligence checks will be undertaken to assess**

- the 'mission fit' or match between the organisation's aims and the Pearce Foundation's purposes and interests
- the organisation's governance and constitutional form its reputation
- the full scope of its operations and any conflicts with your charity's purposes, activities, funding, or other interests

### **The Pearce Foundation reserve the right to withhold funding and support or require repayment if;**

- The funds fall outside the stated objects.

- Any false information is supplied to the Foundation which may jeopardise the reputation and good will of the Foundation.
- Any terms in the agreement are breached
- Activities undertaken are not in keeping with the Foundation's charitable purposes and values
- No progress has been made towards the agreed goals for 2 months.
- The Charity Partner becomes insolvent or goes into administration, receivership or liquidation

**Date of Grant Making Policy:** April 2022

**Date of next review:** April 2024