

Grant-Making Policy of the Charity of Thomas Dawson (CoTD)

1. Purpose

1.1 The purpose of this policy is to set out the principles, criteria and processes that govern how the CoTD makes grants.

1.2 We define a grant as a financial award we make from the Charity's funds to support the objects i.e. education of children and young people within the OX1-4 postcode and the relief of poverty within the St Clement's Parish. Grants are made predominately to organisations but also to individuals.

2. Introduction

2.1 The CoTD benefits communities particularly, in Oxford as set out in the Charity's objects. It is governed by a Board of Trustees. The General Manager has been delegated responsibility for day-to-day activities.

2.2 The Charity's Trustees ensure appropriate governance of grant-making in the following ways:

- Grant-making principles ensure that Trustees ultimately make all grant decisions. Firstly within the Grants Committee with decisions ratified at the main board meetings.
- Grant-making criteria set out who can apply and for what (see section 4). Trustees exclude certain activities which they do not consider to be in line with the Charity's objects this includes those limited by geographical location.

3. Grant-making principles

3.1 The principles which underpin governance of the Charity's grant-making take account of the scale and range of our grants, and balance proper oversight of decision-making.

3.2 The principles are as follows:

- The Board of trustees has ultimate collective responsibility for all grant-making decisions in line with the Charity's objects and any restrictions related to these which are outlined in the criteria.
- Trustees can apply conditions to any grant usually in the form of reports at the end of each year of 3 year grants and in relation to geographical parameters set out in the Charity's objects.

4. Grant-making criteria

4.1. Table of criteria

Criteria and other factors	Educational		Parish Community support	
	Individual	Organisation/school	Individual/Family	Organisation/School
Usual amounts awarded:	Up to £1000	Up to £10k per year for up to three years	Up to £1000	Up to £10k per year for up to three years
Age range	Under 25	Under 25	N/A	N/A
Which groups are these grants aimed at supporting.	Low income and disadvantaged groups	Low income and disadvantaged groups	Low income and disadvantaged groups	Low income and disadvantaged groups
Location	OX1-4	OX1-4	Extent of the Parish of St Clements (see appendix 1)	Extent of the Parish of St Clements (see appendix 1)
Length of residence	3yrs (in exceptional circumstances a shorter qualifying period may suffice)	N/A	1 year (in exceptional circumstances a shorter qualifying period may suffice)	N/A
Support for application required	Yes, school, college, employer	N/A	Yes, school, college, employer, social worker	N/A
Documentation required	Application form Supporting statement/sponsor	Application form. Accounts and statement of need	Application form	Application form Accounts and statement of need

			Supporting statement/sponsor/debt advice worker/social services/Social worker	
What can be supported?	Equipment, bus pass, uniforms/clothing/tools/course fees	Equipment, transport, revision guides, additional tutoring, contribution to building costs, clothing, uniform , fees for club membership, outdoor environments as part of school facilities	Uniforms, furniture, school trips, school dinners, bedding, clothing, heaters, appliances, payments towards heating costs	School trips, additional tutoring, after and before school clubs, school clubs, school dinners, uniform,
What is not supported?	Full fees for university degrees Support beyond first degree Payments for independent or private schools No retrospective claims	Salaries for any staff Payments for independent or private schools No retrospective claims	Rent/Council tax/Debts No retrospective claims	Salaries for permanent staff No retrospective claims
Form the money will be paid in	To a bank account	Annual grant to the school/organisation directly unless other arrangements have been made.	Voucher (Argos) or direct to school/college/bank account	Annual grant to the school/organisation directly unless other arrangements have been made
Compulsory for after grant award	Brief summary of how the money was spent	Annual report (see separate proforma)	Brief summary of how the money was spent	Annual report (see appendix 2)

4.2 The Charity publishes criteria for applications from organisations and individuals via our website.

4.3 All applicant organisations must have a governing document, a governing body of at least three unrelated individuals and a bank account in the organisation's name with at least two unrelated signatories.

4.4 The Charity will consider applications for capital costs like equipment and the development of buildings.

4.5 The Charity will not fund staff costs as part of any grant

4.6 In line with Charity Commission guidance, the CoTD treats safeguarding with the highest importance. We will only consider grants where applicant organisations are able to demonstrate that safeguarding is a priority, and that they have adequate safeguarding policies and procedures in place. The CoTD has a Safeguarding Policy which details our own approach and responsibilities.

4.7 To ensure the Foundation's resources are used solely to further our charitable objects, and so we can report on impact, we normally expect all grants to have up to three measures of success agreed as part of our grant offer. For example: the number of individuals supported, progress with learning, resources purchased.

4.8 Organisations receiving their first grant from the CoTD must submit a satisfactory monitoring report before we will accept further applications. We will not accept applications from any applicant where monitoring on previous awards is overdue.

4.9 We accept applications from individuals to fund specific items outlined in the table. Minimum grants to individuals are lower than those to organisations.

5. Grant-making processes

5.1 The majority of applications will be made using the CoTD's on-line application. However, we will take reasonable steps to provide information in alternative formats in line with the Diversity, Equity, and Inclusion policy.

5.2 Trustees aim for the CoTD's grant-making processes to be transparent and to address the interests of applicants and meet the Charity's objects. Once an application has been received all eligible grant requests go through a process as follows:

- The Grants Committee would need to be advised of the total funds available.
- These funds would consist of any unspent grant allocation from the prior year, plus the current year allocation.

- Allocation of funds according to CoTD criteria.
- Assessment by staff to decide whether a request can be passed to the Grants Committee. Applications are most likely to be rejected at this stage if they are outside the geographical areas set for awards and/or they do not meet the objects of the Charity.
- Review of all applications, and recommendations for which to support, by the Grants Committee.
- Ratification of the recommendation to support by the Board.
- Offer of feedback to unsuccessful applicants.

The intention of this policy is to direct all grants made from the date of its approval.

May 2025

The Trustees acknowledge that this document was modelled on the OCF policy for grant making.

Appendix 1



