

<b>Grant-making Policy</b>	
<b>Version no:</b>	2
<b>Approval date:</b>	2 March 2026
<b>Review date:</b>	March 2028
<b>Who is covered by this policy?</b>	All employees, trustees, volunteers, beneficiaries, grant applicants, and other stakeholders involved in the grant-making activities of OneRichmond.
<b>What is covered in this policy?</b>	This policy outlines our grant-making principles, criteria and processes.
<b>Purpose</b>	This policy sets out the principles, criteria and processes that govern how OneRichmond makes grants. A grant is defined as a financial award OneRichmond makes to support charitable activities, usually to registered charities but sometimes to other bodies.

## 1. Scope

- This policy sets out the principles and processes that govern how OneRichmond makes grants.
- A grant is defined as a financial award OneRichmond makes from its funds to support charitable activities in accordance with its Charity Scheme objects.
- OneRichmond raises funds through a variety of ways, including donations, events, and applying for grants. It provides donors and grant-givers with the security that their donation or grant is directed to where it will have the most impact in the local community.
- This policy sets out how OneRichmond selects organisations and activities to receive grant funding and how they will subsequently be monitored.

## 2. Governance Principles

OneRichmond’s funds are applied in accordance with the charity’s objects. The amount of work or number of projects that can be supported by OneRichmond is necessarily limited by the funds available each year.

The OneRichmond grant-making principles are as follows:

- Trustees have ultimate collective responsibility for all grant-making decisions in line with OneRichmond’s charitable purposes and any restrictions agreed with donors and funding partners.
- Trustees may delegate certain decision-making responsibilities to individual Trustees, decision-making panels or staff within agreed delegated powers. See OneRichmond Delegated Authority Policy Appendix I.
- Trustees review the standard Grant Agreement Terms and Conditions and reserve the right to apply conditions to any grant.
- Trustees acknowledge that grants awarded by OneRichmond on behalf of other donors and funders may be subject to additional principles, restrictions and criteria. The Trustees may accept restricted funding, provided it can be used to further OneRichmond’s objects.

- The Trustees reserve the right not to approve any recommendation if they (or those acting with their delegated authority) determine that the resulting grant would not be charitable or would conflict with OneRichmond's objects or stated policies or damage its reputation.

### 3. Grant making principles

We will work towards meeting IVAR's eight commitments to managing grants and relationships in a way that reflects funders' confidence in and respect to the organisations they fund [www.ivar.org.uk/flexible-funders/](http://www.ivar.org.uk/flexible-funders/)

1. Don't waste time
2. Ask relevant questions
3. Accept risk
4. Act with urgency
5. Be open
6. Enable flexibility
7. Communicate with purpose
8. Be proportionate

### 4. Grant-making processes

Prospective recipients will be required to make a written application for funding setting out how any funds will be used. Applications will be assessed by OneRichmond and decisions on funding made in accordance with the grant-making processes set out below.

- OneRichmond's scheme of delegation sets out the delegated authority of established committees, panels and OneRichmond staff to approve grant applications to no more than the total amount of funds raised and available each year.
- All grants are:
  - Assessed in accordance with the criteria set out below on whether the request should be recommended for support
  - Reviewed and an award decision made on the OneRichmond Team's recommendation by the delegated authority and/or the trustees
- The following should be included in any grant application:
  - How the grant will be used.
  - How use of the funding will support OneRichmond's charitable objects.
  - Information on the applicant organisation, including its beneficiaries and area of operation.
  - Evidence of the need for funding and the impact it would have.
  - How the grant will be managed and applied.
  - The person(s) responsible for the management of the grant and for overseeing the work.
  - Information on insurances held by the organisation.
  - A copy of the organisation's safeguarding policy. Funded partners need to have appropriate safeguarding procedures in place. All organisations granted funding must have a safeguarding policy that is dated and has been reviewed annually. See OneRichmond's Safeguarding Policy and Safeguarding Checklist for further information.
- OneRichmond will carry out sufficient due diligence of any potential grant recipient as part of the application review process and ongoing monitoring.
- All successful applicants must agree the standard Grant Terms and Conditions.
- Funding awards are recorded for grant management and approvals are included in Trustee Board minutes after a grant has been agreed.
- Monitoring and Evaluation:

- The OneRichmond team will regularly meet funded partners to discuss their progress.
- Funded partners must complete annual and/or end of grant Monitoring and Evaluation Reports. These will outline how the grant is used and the impact it has had within the LB Richmond.
- The OneRichmond team will regularly report to any grants committee and the Board of Trustees on the impact of grants awarded and the Annual Report will summarise this.
- Where the grant is for a specified project or purpose, and in situations where that purpose does not proceed or where any grant or part of it remains unused, unused funds must be returned.
- The OneRichmond Complaints Policy explains how to raise a concern and how OneRichmond will deal with it.
- Where records are maintained, these will be stored and subsequently disposed of in line with data protection legislation.
- For pooled funds, OneRichmond plans to advertise grant appeals via:
  - Its website.
  - Umbrella bodies, e.g. Richmond CVS.
  - Other local organisations, networks and groups.
  - Newsletters published by OneRichmond, the Hampton Fund and Richmond Foundation.
  - Social media.

## 5. Grant-making criteria and priorities

### 5.1 Grant Priorities

All grants given by OneRichmond must be used to further the charity's objects. Grants will be made based on the funding available and in how closely they meet our grants criteria.

OneRichmond will primarily fund organisations located in the Borough providing services and/or activities that benefit local people in need. Occasionally grants may be made to organisations based outside the Borough provided they run services and/or activities that benefit local people in need.

As a registered charity, OneRichmond can only make grants to support activity which is charitable. Applicants must be a registered charity, community interest company (CIC), school or other properly constituted not for profit organisation. The types of charitable organisations that may be eligible to apply is subject to change per review by the Trustees. r

The Trustees have identified combatting social isolation as a current need within the Borough and plan to focus the charity's grant-making towards the following priority areas:

- Supporting people with disabilities or long-term health conditions
- Improving mental wellbeing through connection and peer support, particularly for young people
- Supporting people experiencing financial hardship, crisis or life transitions
- Supporting families, carers and individuals at risk of exclusion
- Reducing loneliness and social isolation for older people
- Improving education and employability for hard-to-reach and isolated adults
- Nurturing safe, welcoming spaces that build relationships and belonging

The priorities for support will be reviewed by the Trustees from time to time and at least every two years. The priorities may be changed depending upon circumstances and the perceived effectiveness of the application of funds. Any change to these priorities must still fulfil the objects of OneRichmond.

## 5.2 Assessment Criteria for Applications

Criteria	Detail
Strength of rationale and evidence for proposal	<ul style="list-style-type: none"> <li>• Closely align with our priority of <b>combatting social isolation</b></li> <li>• Closely align with any specification/condition set by OneRichmond on behalf of its donors or funders, that meet identified need and align with the combatting social isolation priority</li> <li>• Demonstrate a strong understanding of local need</li> <li>• Provide clear evidence of demand</li> <li>• Are informed by local knowledge, consultation and insight</li> <li>• Add value to existing services and activities</li> </ul>
Appropriateness and deliverability of activities	<ul style="list-style-type: none"> <li>• Be realistic, well-planned and achievable</li> <li>• Clearly explain how beneficiaries will be reached and supported</li> <li>• Demonstrate capacity to deliver at the proposed scale</li> <li>• Operates/delivers within and/or clearly shows how they will engage people living in the LB Richmond</li> <li>• Support a significant proportion of Richmond borough residents</li> <li>• Show a commitment to learning and continuous improvement</li> <li>• Illustrate inclusive approaches that reach under-represented or disadvantaged groups</li> </ul>
Impact and value for money	<ul style="list-style-type: none"> <li>• Make a demonstrable difference to people's lives</li> <li>• Have clear, measurable outputs and outcomes</li> <li>• Is proposing value for money in terms of the scale of people supported and activity proposed</li> <li>• Include contingencies where funding is not yet confirmed</li> <li>• Collaborate with partners to maximise impact and contribute to a stronger, more connected voluntary and community sector within the Borough</li> <li>• Consider equitable access and outcomes</li> </ul>
Capacity and capability to deliver	<ul style="list-style-type: none"> <li>• Demonstrates the organisation has the capacity and capability to deliver the proposal</li> <li>• Has a successful track record of delivering similar activity/work</li> <li>• Employees, volunteers and trustees have appropriate skills, experience and capacity to effectively manage and deliver</li> <li>• Demonstrates good governance, manages finances appropriately and is accountable and transparent</li> <li>• Manages risk effectively</li> <li>• Meets safeguarding requirements and holds appropriate insurances</li> </ul>

## 5.3 Grant requests which OneRichmond **will not** fund

- Applications not aligned with current priorities
- Activity that does not benefit residents of the Richmond borough
- Anything that is the **primary responsibility of a statutory body**
- Organisations that are not registered charities, Community Interest Companies, Schools or other properly constituted not for profit organisations
- Individuals
- Medical research
- Political activity or campaigning

- Capital expenditure
- Activities that promote the practice of religion or specific belief systems
- Retrospective funding

**The Board of trustees may vary the terms of this policy from time to time.**

Approved by the Board of OneRichmond on 2 March 2026