



Grant Making Policy

December 2025

Purpose

This policy sets out the Foundation's aims and principles in making donations and awarding grants.

Charitable objectives

The Foundation supports the needs, projects and activities of any charity, organisation or individual for the public benefit directed wholly or mainly to the Parish of Beaulieu and its immediate vicinity, including:

- The relief of those in need, by reason of youth, age, ill-health, disability, financial hardship or other disadvantage
- The advancement of amateur sport
- The advancement of the arts, culture, heritage or science
- The advancement of education
- The advancement of religion
- The advancement of citizenship or community development

This is not a restrictive list and the trustees will consider any grant application having regard to the guidance issued by the Charity Commission on Public Benefit.

How to apply

Grant requests should be made using our on-line application process which can be found at www.beaulieu-cgf.org.uk. Please include any relevant supporting documents, such as accounts, a programme plan or budget. A trustee board member will initially consider all applications for validity and completeness. Grants are awarded entirely at the discretion of the trustees and their decision is final.

Assessment criteria

Grants will be assessed based on the merit of the application.

If the number of valid applications exceeds the available funding, the trustees will use the following criteria to guide their decisions on how to allocate resources:

- Those most in need
- The most vulnerable such as children, disabled people, and older individuals
- When a small grant could help an organisation continue operating or enable a larger project to proceed
- Any other priorities that the trustees may decide from time to time

Beaulieu Common Good Foundation
Grant Making Policy
(Cont'd)

Condition of grants awarded

The trustees request that all grants awarded are acknowledged on receipt and require that any grant is spent only for the purposes for which it is given and that any unused portion of the grant is returned to the Foundation.

Any grant made by the Foundation is important to us and the trustees may take the opportunity to discuss directly with a successful applicant the benefit that the grant has had on the community.

Payment of grants

All applicants will be notified of the outcome of their application as soon as possible after the trustees' decisions have been made. The trustees reserve the right to publish the names of successful grant applicants including on its website unless privacy is requested as part of the grant application.

Data protection

Applicants' data will be held in accordance with data protection legislation. It will be held securely, disclosed only if subject to a valid access request, treated as confidential, only used for the purpose for which it has been provided and destroyed, once no longer needed.

Review

This policy shall be kept under periodic review by the trustees.