



## **THE LOWDE MUSIC TRUST GRANT MAKING POLICY**

**EFFECTIVE DATE: 01.03.14  
v1.1**

### **Executive Summary**

The Lowde Music Trust has established a grant making policy to support and ensure its objects for supporting education amongst young people in music and the arts and helping relieve the effects of sickness and infirmity amongst young people are met. This policy outlines the criteria by which the trust will distribute funds to eligible individuals, organisations or projects.

## 1. PURPOSE

- 1.1. The purpose of this policy is to set out the principles, criteria and processes that govern how The Lowde Music Trust (LMT) makes grants across all fund types.
- 1.2. A grant is defined as a financial award made by the The Lowde Music Trust from its funds to support charitable activities, usually to registered charities or charitable community groups, but sometimes to other bodies or individuals.

## 2. INTRODUCTION

- 2.1. LMT is charitable company limited by guarantee. It is in the process of applying for registered charity status (application number 5080165)
- 2.2. LMT is governed by a board of trustee directors.
- 2.3. An appointed Chief Executive has delegated responsibility for day-to-day activities, but not grant making decisions
- 2.4. All decisions on grants, donations and funding given by the trust are made by the main trust board.
- 2.5. The trustees have three main routes to govern the LMT's grant-making:
  - 2.5.1. Grant-making **PRINCIPLES** which ensure that decisions are ultimately made by the LMT trustees.
  - 2.5.2. Grant-making **CRITERIA** which provide the public statement of the activities the trustees wish to support in furtherance of the Trust's charitable objectives.
  - 2.5.3. Grant-making **PROCESSES** which set out in broad terms how decision-making is carried out for different types of funds.

## 3. GRANT MAKING PRINCIPLES

- 3.1. The Board of Trustees has ultimate responsibility for all grant-making decisions in line with the LMT's charitable purposes and any restrictions agreed with donors and funding partners.
- 3.2. The Trustees may give certain decision-making responsibilities to its sub-committees, Board members or staff within its framework of delegation.
- 3.3. All Trustees understand the LMT's grant-making principles and processes and have opportunities to engage in and learn from grant-making activities.
- 3.4. The trustees reserve the right not to approve any recommendation or nomination if, through its decision-making, it determines that the resulting grant would not be

charitable, or would conflict with the LMT's stated policies or damage its reputation.

- 3.5. No individual Trustee may personally gain from the benefit of any of the funds provided by the Trust.
- 3.6. Any Trustee who has a relationship with a potential recipient of a grant (organisation or individual) should declare this at the point of grant application and shall abstain from voting in the Ratification of any grant award
- 3.7. Decisions taken by the Trust about providing grants can only be taken if they are in line with furthering the Trust's purpose and meet the Trust objects which are:
  - 3.7.1. To advance the education of young people in the subject of music and creative performance by:
    - 3.7.1.1. Awarding to such persons scholarships, maintenance allowances, grants or support services and equipment not normally provided by the statutory authorities
    - 3.7.1.2. Facilitating mentorship and providing support in music and creative performance
  - 3.7.2. The relief of sickness and the preservation of health among young people through:
    - 3.7.2.1. Direct financial support for the use of music as therapy
    - 3.7.2.2. Providing other charitable organisations who are working in the relief of sickness and preservation of health among young people with financial means and/or partnering support
    - 3.7.2.3. By providing and assisting in the provision of facilities, support services and equipment not normally provided by the statutory authorities

#### **4. GRANT MAKING CRITERIA**

- 4.1. The aim of the grant-making criteria is to provide clear information from the trustees to those individuals and groups who want to apply for grants.
- 4.2. Clear guidance on criteria for applications from individuals and groups is a part of this policy and set out at Appendix 1.
  - 4.2.1. These will be reviewed annually by the Trustees to ensure they are inline with Trust's objects and regulations
- 4.3. The Trustees wish to make grants to a wide range of organisations and individuals and LMT normally only makes grants to organisations where there are strong relationships in the primary area of benefit and the proposal has potential to achieve a substantial impact.

- 4.4. Trustees expect that grants will normally achieve one or more of the following outcomes:
- 4.4.1. Furthering the education of young people in the music and arts
  - 4.4.2. Providing advice and mentoring to support young people in music and arts
  - 4.4.3. Providing equipment and services to young people in music and art education not normally provided by the statutory authorities
  - 4.4.4. Providing music as a therapy to young people who are ill or infirm
  - 4.4.5. Providing other charitable organisations who are working in the relief of sickness and preservation of health among young people with financial means and/or partnering support
  - 4.4.6. By providing and assisting in the provision of facilities, support services and equipment not normally provided by the statutory authorities
- 4.5. Grant requests which the trustees will not normally support are:
- 4.5.1. Contributions to general appeals or circulars;
  - 4.5.2. Religious activity which is not for wider public benefit;
  - 4.5.3. Public bodies to carry out their statutory obligations;
  - 4.5.4. Activities which have already taken place;
  - 4.5.5. Grant-making by other organisations.
- 4.6. The lowest amount that a grant will normally be made for is £100. This applies to grant requests and donor-nominated grants.
- 4.7. There is no upper limit but applicants should be mindful of the LMT's average grant size.

## 5. GRANT MAKING PROCESSES

6. In setting grant-making processes, the Trustees have determined they should be transparent. To this end, all grant requests go through a four-stage process as follows:
- 6.1. **Allocation** to available funds according to their availability and criteria. Requests that cannot be allocated to live funds are rejected.
  - 6.2. **Assessment** by staff to determine whether the request should be shortlisted for support. Requests not shortlisted are rejected
  - 6.3. **Review** of the assessment and recommendation by the Board of Trustees, or by a person acting with the delegated authority of the Board. Grants not recommended are rejected, unless allocated to another fund.

- 6.4. **Ratification** of the recommendation by the Board or a person/committee acting with its delegated authority.

## **APPENDIX 1: GRANT MAKING CRITERIA**

### GRANTS FOR GROUPS OR ORGANISATIONS

#### **Who can apply?**

LMT make's grants to a wide range of organisations.

Your work and activities must be inline with the objects of the Trust

You do not have to be a registered charity to apply, but the work you ask us to support must be legally charitable. You must have a governing document (constitution, rules, memorandum and articles of association etc.). You must also have a bank account in your group's name with at least two unrelated signatories.

You can apply whatever your income level.

Applications for funding can be made by individuals, organisations and Project Managers via the website contact form, or email to Trustees, or in writing to the organisation head office.

#### **When will you get a decision?**

Decision making is made at the Trustee Board meetings and you will be notified of the timetable for decision making when we acknowledge your application.

### GRANTS FOR INDIVIDUALS

#### **Who can apply?**

While it is more usual for LMT to provide funds to organisations it can at the Trustee's discretion provide fund to help individuals.

Applicants must show how the funds will be used to pursue the Trusts objects and purpose.

Applications for funding can be made by individuals, organisations and Project Managers via the website contact form, or email to Trustees, or in writing to the organisation head office.