



GRANTMAKING POLICY

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EXECUTIVE SUMMARY

The purpose of the Grantmaking Policy is to outline the principles and definitions used by Essex Community Foundation within its grantmaking, and to articulate to potential and current applicants, and donors the expectations and parameters of the Foundation's grantmaking.

Separate documents set out the procedures by which we make and monitor grants.

Vision

A strong generous community – an Essex where people work together to enhance the quality of local life.

Mission

To inspire philanthropy and charitable giving – matching people, ideas, resources and needs to make a lasting difference.

Values

We are **accountable** to our community and to our donors and funders, by being transparent in all our communications and activities.

We remain committed to being an organisation which is **approachable** by donors, grant recipients and strategic partners alike.

We encourage and support **innovation**, recognising that needs are best tackled through the independent and creative determination of people.

We act with **integrity** and **professionalism** at all times.

1. INTRODUCTION

i. Background

Essex Community Foundation (the Foundation) was established in 1996 as an independent charitable trust¹. The aim of the Foundation is to improve the quality of life of people in our community by managing charitable funds and distributing grants on behalf of individuals, families, companies, trusts and public agencies (referred to as funds, fundholders, donors' as appropriate, for the purpose of this document).

The Foundation offers a professional flexible service to assist in effective giving. In the first 18 years of grantmaking, the Foundation distributed grants totalling more than £24 million ranging in size from £100 to over £200,000, the average amount being approximately £4,000. Grants are awarded to support a wide range of charitable activity that improves the quality of life for local people.

The Foundation encourages applications from community and voluntary organisations that are seeking funding for charitable purposes for the benefit of communities in Essex, Southend and Thurrock.²

Definitions:

Funds	Where a Fund Agreement is in place, a fund will have a monetary value and will be either: Named, Designated, Discretionary and can be endowed or flowthrough.
Fundholders	The signatory(ies) of the Fund Agreement who may make grantmaking decisions or delegate decision making to a panel or to ECF.
Donor	Generally a donor does not have a formal Fund Agreement and may or may not donate to a named fund; in the event that they do not stipulate a particular fund their donation will be added to ECF's Acorn Fund.

ii. The Needs of the People of Essex

There are a number of factors which impact upon the health, wellbeing, achievement and sense of belonging within the communities which make up Essex. Parts of the county have high levels of poor-health, low levels of educational attainment, high levels of crime (or fear of crime) or unemployment. In many districts, deprivation can exist alongside areas of relative affluence.

In 2013 ECF published its first Vital Signs report, which is an annual initiative bringing together existing statistical data with community opinion to give a 360 degree view of life in Essex. Vital Signs reports across 12 common themes

¹ Registered Charity number: 1052061

² It should be noted that the Foundation does have the power to distribute designated funds outside of Essex at the specific request of a fundholder donor.

including rural issues, transport, health and wellbeing and learning, presenting the information in a coherent easy to read format. The initiative originated in Canada and ECF is one of the first UK community foundations to publish a report. As a community philanthropy tool Vital Signs will help ensure the Foundation's resources are used to address need, wherever possible. It will also inform discussions with existing and potential donors and applicants for grants. The Foundation will seek to raise awareness of the needs of the county, and the way in which the resources available to it can be utilised to best effect.

2. AIM OF THE GRANTMAKING POLICY

This document relates to the grantmaking activity within the Foundation and sets out relevant policy. Separate documents setting out the Foundation's Fund Development, Communications and Governance Plans form the Strategic Business Plan of Essex Community Foundation. The Foundation's committee structure ensures that respective activities are entirely complementary. All committees support delivery of the objectives set out in the Foundation's Strategic Business Plan.

In awarding grants the Foundation aims to be fair, professional, effective, efficient and pro-active. The aim of this policy is to explain the approach to our entire grantmaking. In doing so we can demonstrate that our policy is robust, transparent and accessible to attract applications from the wide range of Voluntary and Community Organisations (VCOs) active throughout Essex. Our grantmaking criteria must be clear and consistent, but also remain flexible in order to ensure that donors' wishes can be incorporated. Whilst recognising its key role of managing funds on behalf of fundholders, it is imperative that the Foundation remains flexible, while operating to a high standard of grantmaking practices.

In summary, the Foundation's grantmaking activities seek to identify and highlight unmet need within our communities and as a result to direct funding to tackle inequalities.

i. Quality Accreditation

Quality Accreditation is a programme run by our membership organisation, UK Community Foundations and is based on a set of seven key standards developed by community foundation members. Quality Accreditation is formally endorsed by the Charity Commission for England and Wales since 2006.

Essex Community Foundation has successfully achieved Quality Accreditation, which demonstrates our adherence to the key standards regarding Governance, Finance, Donor Services and Development, Grantmaking, Community Engagement and Communications. The Foundation has, where necessary, developed relevant policy documents and statements including those in relation to its grantmaking some of which will be referred to within this policy document. All of the Foundation's policies underpin Quality Accreditation, some policies are referred to within this document but all including, equal opportunities and safeguarding, are relevant to and observed in the day to day delivery of grantmaking.

ii. Grantmaking Principles

The Foundation aims to take a strategic approach to its grantmaking. Essentially this means that we wish to see sustainable changes taking place in both our communities and the organisations which work with them. We will seek to identify need and respond to it, placing a real emphasis on securing measurable outcomes.

We aim increasingly to develop programmes of grantmaking and support that:

- are informed by research, information and consultation. This relates to individuals, families, groups and communities within our area, and the capacity of the voluntary and community sector to impact positively on these
- respond to need across the county
- promote fairness and equality
- prioritise the allocation of resources to achieve maximum impact
- reflect the need to develop the capacity of local, community based organisations
- enhance community and voluntary activity and encourage best practice
- draw on independent advice, wherever this adds value to our work
- implement, monitor and evaluate to ensure optimum achievement, drawing from users of services as well as the recipients of grants themselves

The key principle of ECF is to ensure grant funding remains available to voluntary and community groups working to support local people. The Foundation's grant funding is used to support organisations that may be developing new ideas, or to continue existing work and address emerging need. However, the Foundation recognises the development of new models of social investment and the move of many public sector organisations to a more strategic commissioning role. The Foundation will seek to emulate this approach wherever it adds value and wherever there is demand, starting with needs assessment, which may include identifying particular services and outcomes, to working with potential providers before allocating resources and monitoring performance.

Adopting a programme approach also means that we can take an objective view of how we wish to see the funds under our control making a difference to the population in the longer term. It provides a framework within which to operate – the Foundation will use intelligence about the community e.g. Vital Signs and through the use of other partners' intelligence to identify broad themes, where a range of grants, possibly drawing on a number of funds, can be targeted to make the maximum impact.

The Foundation has signed up to the Essex Compact codes of practice which set out principles and standards for a good, open, and fair relationship between statutory and voluntary organisations in Essex. The Compact contains commitments for both sectors and aims to provide common standards of good practice that can prevent unnecessary conflict and misunderstanding.

Therefore, in its management of any Government funding programme, the Foundation will aim to complement the principles of the Essex Compact Agreement under the codes of practice. The Foundation aims to adhere to the prescribed funding principles within the framework and will provide clear

information in regard to timescales, accessibility, transparency, accountability and inclusiveness where practical to do so within any contractual commitments.

iii. Funding to Organisations - Eligibility and Criteria

Grants made by the Foundation generally fall under the broad heading of improving social welfare and, of particular interest are local VCOs that can demonstrate an enthusiasm and determination to meet immediate and emerging needs and that have captured the imagination and commitment of local communities.

The Foundation encourages applications which:

1. Support either new or existing social and community activity
2. Evidence that funding will make a real difference
3. Encourages community involvement and self-help
4. Are, in the main, from community based organisations

The Foundation primarily manages open grants programmes, i.e. programmes where applicants complete an application form which is then submitted to meet a certain deadline. The Foundation will predominantly seek to make grants to a wide number of recipients, maximising the impact of its funds. The Foundation is also committed to supporting the ongoing needs of some organisations and fundholders in a strategic way i.e. where further funding contributes to their becoming sustainable, or where there are few existing, organisations to meet the needs of their communities. New programmes may be developed which seek out and commission applications and award higher value, longer term funding, where the Foundation's research identifies specific need.

In any event all applicants will need to demonstrate their Public Benefit as defined by the Charity Commission. The criteria upon which the Foundation accepts applications are:

1. From VCOs, or other non-profit making organisations, providing that the organisation demonstrates that it exists for the public benefit and/or the purpose for which they are seeking a grant is charitable
2. For the benefit of people living within the administrative county of Essex, Southend or Thurrock (the Foundation can, at the request of a donor, award funds outside of Essex) and
3. Organisations with a permanent presence in Essex, Southend or Thurrock, (National or regional organisations may apply if they can demonstrate their work will directly benefit local people)

The Foundation greatly values the importance of developing effective relationships with individual funded organisations and with the voluntary sector more generally, and currently works with over 200 people on grant panels to ensure we tap into local knowledge. Grant panels are a vital resource as they enable the Foundation to demonstrate our roots within local communities, and provide transparency and accountability to our grantmaking process. Equally, by developing stronger, clearer relationships and by building trust with funded organisations, we can help to prevent any misunderstandings, remain a flexible and accessible funder for local organisations and continually strengthen the Foundation's knowledge of the growing voluntary and community sector in Essex.

The Foundation will not support the following types of projects:

1. Organisations whose work does not support people living within the administrative county of Essex, Southend and Thurrock³
2. Organisations that are for the sole relief or benefit of animals or plants
3. General appeals i.e. a request for a general contribution to a larger project where an identifiable aspect has not been defined
4. Political promotion including political party activity
5. The support or promotion of a religious doctrine; mission; proselytism or promotion of the beliefs of a particular faith (beyond basic religious/cultural awareness raising)
6. Statutory agencies including Parish Councils in the discharge of their statutory obligations
7. Retrospective or deficit funding and
8. Organisations or activity that cannot demonstrate Public Benefit as defined by the Charity Commission

The diversity of funds under the management of the Foundation continues to develop. When a fund is restricted, i.e. to fund projects in a specific geographic area, or for a specific purpose or theme, the Foundation may solicit applications from certain organisations to meet the requirements of the fund. In the event this happens the Foundation will use its networks of VCOs, local infrastructure groups and/or use its own database to highlight potential applicants.

As part of its professional service to fundholders the Foundation has in place a designated fund policy (Appendix A) that outlines how funds can be awarded to a named charity at the specific request of a fundholder or donor. Any wish on the fundholder's behalf to designate named charities to receive donations will be discussed during the set-up of a fund, this may include organisations being currently supported; a Fundholder may also request the Foundation to make a one-off donation to a specific charity.

iv. Funding to Social Enterprise and CICs

The Foundation recognises that a Social Enterprise (SE) and Community Interest Companies (CIC) are increasingly part of the wider Third Sector and as such they are often in a good position to tackle social issues by generating income as part of their normal operation. Therefore, when a SE or CIC makes a grant application it is important for the applicant to demonstrate a sound business model or strong financial track record.

The Foundation would prefer that a SE or CIC will have been registered with the appropriate Regulatory Body for twelve months prior to the date of the grant application. The Foundation would normally expect a SE or CIC to have become self-sustaining within four years from incorporation but will consider applications from those which have been established for a longer period than this, providing the application is for capacity building or a new initiative that will develop services for the ultimate benefit of the user group.

³ It should be noted that the Foundation does have the power to distribute designated funds outside of Essex at the specific request of a fundholder donor.

v. Funding to Individuals

Although the Foundation generally supports VCOs within our Memorandum of Association we have the discretion to award grants to individuals. The Foundation manages a number of funds, both donor advised and discretionary, that support individuals to take the next step in their chosen area/discipline e.g. arts, sport or sciences where finance is the barrier to their development.

Agreement of grants to individuals from donor advised funds will be made in conjunction with the fundholder, and ECF Board of Trustees.

Agreement of grants to individuals from discretionary funds is by the Essex Education Panel, which was established in 2014 and is chaired by an ECF Trustee.

In both the above cases individual applicants will be required to evidence the likely impact that any award will have on their personal development and/or the organisation or community where they work or volunteer.

vi. Partnerships

The Foundation places a great emphasis on partnerships. It will work with partners from the statutory and non-statutory sectors on a number of levels. These can range from sharing intelligence about needs, to agreeing common priorities and strategies for commissioning, to aligning or formally pooling resources for investment. Partners can also work together on stimulating the development of new local organisations to deliver services, as well as maintaining and growing the capacity and capability of existing ones.

All parties will focus on outcomes wherever possible, rather than inputs and outputs. In this way recipients of funding will be able to innovate. Where the Foundation acts effectively as an agent (predominantly for central government or European funds), it will ensure that clarity exists about the expected outcomes and the metrics required to demonstrate its effectiveness to the funder.

vii. Charities Act 2006

In 2006, Parliament passed legislation for charities which, amongst other provisions, gave fresh emphasis to the requirement for all charities' aims to be, demonstrably, for the public benefit. As the regulator of all charities in England and Wales, it is in the Charity Commission's interests that the approach to public benefit maintains and, if possible, increases the public's trust and confidence in charities.

All applicants to the Foundation must be able to demonstrate their public benefit in order to be considered for funding. This means the aims of the organisation or the activities that require funding must fall within, or are analogous to, the 13 descriptions of charitable purposes as set out by the Charity Commission. Please visit www.charity-commission.gov.uk.

viii. Equal Opportunities

The county of Essex is one of considerable diversity - diversity of need, opportunity, people and culture. We recognise that within it there are many groups of people who are disadvantaged by poverty, inequality of many kinds, social and physical exclusion. We believe that enhancing equality of opportunity is part of the core function of the Foundation and that we must, therefore, play a constructive role in challenging and responding to such disadvantage and inequality. Applicants will need to demonstrate that they actively promote equality through their Governance and Policy; Service Delivery; Fundraising; Recruitment and Employment.

ix. Safeguarding Children and Vulnerable Adults

The Foundation recognises that it has a duty, as has every organisation working with children or vulnerable adults, to put in place safeguards to protect these client groups according to legislation with regard to beneficiaries, trustees, staff and volunteers. The Foundation is also committed to ensuring that all grant recipients understand and are aware of this duty and must, where relevant, have in place a safeguarding policy that is in line with current legislation and best practice, and procedures for dealing with issues of concern or abuse towards the prevention of risk.

3. SOURCES OF FUNDING

The Foundation manages funds on behalf of individuals, families, companies, associations, charitable trusts and public sector agencies. The role of community foundations, wherever they exist, is to offer a professional flexible service to assist fundholders and donors to give effectively and achieve their philanthropic objectives, whatever their area of interest or level of giving.

Community Foundations are increasingly recognised by European, central and local Government as an effective conduit for channelling funds efficiently and effectively into the voluntary and community sector.

i. Fund and Awards Profile

A detailed description of the type of funds and awards held and made within Essex Community Foundation and common across all community foundations is shown in Appendix B. Where funds are restricted by the fundholder or donor, the Foundation has to consider how it might balance their preferences and priorities with those articulated in this policy. This will require the Foundation to present a reasoned case to illustrate how a restricted fund can address some of the programmes identified by its intelligence, whilst staying true to the original wishes of the fundholder or donor.

4. GOVERNANCE

i. Board of Trustees

ECF's Board of Trustees has full responsibility for the distribution of all funds under its management. It is responsible for setting the framework within which grants are made, and requires assurance that the grants made meet the principles outlined in this policy. The Board delegates authority for ECF's grantmaking to the Grant and Programmes Committee.

Further information is contained within the Foundation's procedural documents.

ii. Trustees and Fundholder Engagement

Visits for the Foundation's Trustees, fundholders, donors, and members of Advisory Panels are encouraged. Visits to organisations bring to light the issues effecting Essex and raise awareness of local community activity.

Fundholders and donors will be encouraged to make visits predominantly to those organisations where their fund has made the award and the Foundation will be active in keeping fundholders and donors informed about how funds have been used.

5. GRANT MANAGEMENT

i. Introduction

Separate documents set out the *process* for the distribution of funds, by outlining a minimum standard to which the Foundation will adhere. This ensures that the Foundation is an effective grant maker, whilst being confident that the necessary safeguards are in place to protect the interests of fundholders, donors and trustees. In some instances, especially where the Foundation is managing a statutory sector grant programme, it may be that the fundholder will ask for elements to be added to the process. For example, fundholders or donors may have specific requirements regarding the way in which applicants should be assessed or the information they require at the monitoring stage. In principle these processes will be accommodated, although particularly onerous requirements may be reflected in the management fee.

ii. Application Forms and Guidelines

The Foundation is committed to making all grant application forms accessible to local voluntary and community groups, regardless of size and professional fundraising expertise.

The application form is designed to gain essential information about the organisation and its eligibility for funding. It requires information regarding the structure of the organisation, the request for funding, how the money will be used, and how a grant will benefit the local community. This is fundamental to the Foundation being able to assure itself (and its fundholders) that it can monitor and evaluate the work of the organisations it supports.

iii. Assessment

The aim of the grants assessment is to ensure the applicant organisation meets the eligibility and criteria of the Foundation and to establish and summarise the overall need for their services. Assessment Guidelines exist in support of the Grantmaking Policy and provide detailed guidance on how to assess an application. It is the responsibility of the Deputy Chief Executive to ensure the guidelines are up to date and available to all grants assessors.

The Foundation consistently receives requests for funding which exceed the funds available and as such a scoring system enables the prioritisation of applications within each grants round. A maximum of 5 points is awarded to each of the following categories:

1. Value for Money
2. Evidence of Need
3. Management and Governance
4. Community Involvement
5. Lasting benefit

iv. Grant Decision Making

The process involved in the administration of grant awards from unrestricted and restricted funds is described in detail in the procedural document. In most cases, (but not all) donor advised funds have some restrictions placed on their distribution. It is the responsibility of the Deputy Chief Executive to take relevant restrictions into account when recommending awards for approval.

The Foundation's Grants and Programmes Committee has delegated authority from the Board of Trustees to approve grants made by the Foundation as set out in the Foundation's Articles of Association. The Grants and Programmes Committee must approve all grant awards. Should a fundholder or donor want to support an organisation, project or activity that the Grants and Programmes Committee has rejected then the Deputy Chief Executive and Chief Executive of the Foundation must report the matter to the Chair of the Grants and Programmes Committee for discussion and resolution.

v. Terms and Conditions

Funding is awarded to an organisation with Terms and Conditions, which must be accepted by the organisation before payment is released. Terms and Conditions are standard across all funds, but the Foundation can make additions at the request of a fundholder or donor. Every organisation in receipt of a grant must, as part of their Terms and Conditions, inform the Foundation immediately of any change to their circumstances. Any change must be reviewed and acknowledged by the Deputy Chief Executive, and where a specific change to the use of the grant is requested authorisation from ECF is required. Failure to notify the Foundation of the foregoing may result in the grant being withdrawn and all funding being returned. Funding for one project cannot be transferred to another project without prior agreement.

vi. Breach of Terms and Conditions

In the event the Foundation considers an organisation has breached Terms and Conditions the Foundation reserves the right to request the return of the total grant awarded. No future applications for funding will be accepted from organisations in breach for a minimum of 2 years and then only if the organisation is able to provide evidence of action taken to strengthen management capacity, including support sought from CVS or relevant umbrella organisation.

Other changes to Terms and Conditions may be implemented by the Foundation at any time. All agreed changes to the Terms and Conditions will be recorded in the Foundation's database.

vii. Appeals

An organisation can appeal the Foundation's decision to not fund or reduce the amount offered, if the decision is based on insufficient funds being available for distribution. Appeals will only be allowed in the following cases:

1. Where the organisation provides evidence that the Foundation's representative showed prejudice in considering the request, or
2. The details provided to the Grants and Programmes Committee or the donor advised panel were factually incorrect in some material aspect.

The appeals process is outlined in Appendix C.

viii. End of Grant Reports

The completion and return of an End of Grant Report (EOGR), by the given deadline, is a requirement of the Foundation. The Foundation works with many donors including companies, individuals and local authorities to support organisations across the County and, as part of our ongoing relationship we update our fundholders and donors and let them know the difference their funding is making; this not only strengthens our relationship with them but also increases their knowledge of the issues facing many organisations.

Failure to submit a satisfactory EOGR is considered a breach of the Foundation's Terms and Conditions as detailed above. Failure to return EOGR by the specified deadline may affect any future funding, that is, no future applications for funding will be accepted from organisations in breach for a minimum of 2 years and then only if the organisation is able to provide evidence of action taken to strengthen management capacity, including support sought from CVS or relevant umbrella organisation. In such an event the Deputy Chief Executive together with the Grants and Programmes Committee will review and consider the application.

Where multi-year funding is agreed, an appropriate monitoring framework will be implemented. The Foundation will have the right to undertake a monitoring visit to any of the funded applicants.

Monitoring visits will take place to cover a wide spectrum of activity and will aim to cover larger grants and a selection of organisations making repeat requests for funding. The only exception will be where the funding has been for a single

capital item, the purchase of which could be verified through documentation and end of year accounts. It would still be necessary to establish the benefits in respect of service provision from the acquisition of the capital item. Should a visit be required to an organisation then the meeting must not take place within an applicant's home.

ix. Fraud

The Foundation takes fraud very seriously and we are committed to ensuring that the appropriate guidance and information is available to all grant assessors to mitigate the risk of fraud at every opportunity.

There is unlikely to be any clear evidence that an organisation is fraudulently applying for funds and so the Foundation values the importance of following up intuitive feelings when assessing funding applications. When used appropriately, such intuitive feelings can lead the assessor to probe more deeply and carry out more rigorous investigation of a particular applicant.

In the event the Foundation considers that a grant has been used fraudulently the Foundation will seek to recover the full grant and any associated costs. We will inform the relevant regulatory authorities, which may include the Police and legal action will be considered.

x. Lone Worker

The Foundation's Health and Safety Policy details the overarching requirements for all employees when working either in the office, at home or on external visits or meetings. Whenever possible all visits should take place in a public place if this is not possible then the Deputy Chief Executive will agree a suitable meeting location. In addition to this and item 5viii above and in order to facilitate the tracing of lone workers, employees are required to leave details of their whereabouts in the office and at home on the Public Calendar in Outlook. These should include:

- a) Contact details of the destination including a postcode
- b) Name of the person they are visiting
- c) Timings and duration of visit
- d) The purpose of the visit

xi. Impact

The Foundation is committed to continually investigating methods to demonstrate the impact of our grantmaking. The Foundation is currently supporting the development, by UK Community Foundation's, of a UK network wide Impact Assessment Framework. This will complement the online application and End of Grant Report. Currently the Foundation carries out the following to demonstrate impact:

1. Independent evaluation reports of specific funds
2. End of Grant reports from all grant recipients
3. Donor/fund-holder visits to organisations
4. Regular e-updates
5. Stories and news on website and other social media

6. Press coverage on grants awarded and new funds available
7. Press coverage by grant recipients
8. Case studies published on website and in Annual Review
9. Donor evenings, bringing donors and grant recipients together
10. Award evenings celebrating organisations and their work
11. Feedback from stakeholders and Networks

The Deputy Chief Executive together with the Head of Communications will ensure that a sufficient communication programme is in place to continually demonstrate the Foundation's impact as a grant maker.

6. FUTURE REVIEW

This policy is a working document and as such is used to guide and clarify the grantmaking activity of the Foundation. The policy has been developed over time and looks to reflect the needs and requirements of the voluntary and community sector, Essex Community Foundation and our donors.

The policy will be reviewed every three years by the Grants and Programmes Committee and ratified by the Board of Trustees to ensure that it continues to meet the social needs of the people of Essex, Southend and Thurrock, as well as any changes in regulation or legislation. Any intermediate changes to the policy will be agreed with the Grants and Programmes Committee.

For further information please contact:

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Approved by ECF Board of Trustees on 6 November 2014