

The Cooper Associates Foundation Grant Making Policy

1. The Objects of The Cooper Associates Foundation

The Cooper Associates Foundation is a grant making charity supporting general charitable purposes, acting alone or in association with others, by such charitable activities as the Trustees shall determine, to include (without limitation) charitable activities designed to benefit the communities in the sub-region comprising the area in and around Taunton, Somerset (the “area of benefit”) and in particular (but not by way of limitation) to advance in life and help young people in the area of benefit through:

- (1) The provision of recreational and leisure time activities provided in the interest of social welfare, designed to improve their conditions of life;
- (2) Providing support and activities which develop their skills, capacities and capabilities to enable them to participate in society as mature and responsible individuals.
- (3) To help young people, especially but not exclusively through leisure time activities, so as to develop their capabilities that they may grow to full maturity as individuals and members of society.
- (4) To act as a resource for young people up to the age of 18 living in the area of benefit by providing advice and assistance and organising programmes of physical, educational and other activities as a means of:
 - (a) advancing in life and helping young people by developing their skills, capacities and capabilities to enable them to participate in society as independent, mature and responsible individuals;
 - (b) advancing education;
 - (c) relieving unemployment;
 - (d) providing recreational and leisure time activity in the interests of social welfare for people living in the area of benefit who have need by reason of their youth, age, infirmity or disability, poverty

2. Priorities for support

2.1 The number of projects which can be supported is through necessity, limited by the amount of funds available for distribution in any year.

2.2 The priorities will be reviewed every year (or more often if deemed appropriate by the trustees) and may be changed in accordance with the trustee's view of the most effective application of available funds at any point in time.

3. Principles

In awarding grants, the trustees will apply the following principles:

3.1 Applications from Somerset, Devon, Dorset, Bristol and the surrounding areas are eligible for consideration and all applications will be considered on merit alone.

3.2 All applications from previous recipients of grants or from previously unsuccessful applicants will be considered on merit alone.

3.3 The Foundation will work in partnership with other organisations where appropriate to fund initiatives beyond the financial scope of a single organisation Trustees reserve the right to request information on other donors.

3.4 The Foundation will not normally support applications from large national charities i.e. those with an annual income in excess of £500,000 or with £500,000 of assets, or charities dedicated to issues deemed by the Trustees to be already well funded within Somerset, Devon, Dorset, Bristol and the surrounding areas.

3.5 The trustees reserve the right to not approve any application if through its decision making, it determines that the resulting grant would not be charitable or would conflict with the foundations stated policies or damage its reputation.

3.6 The Foundation grants are restricted to a maximum amount of £10,000.00, this figure will be periodically reviewed and amended by the board of trustees as they see fit. Trustees can at their discretion increase the funding offered where it is deemed appropriate to fulfil a particular grant.

4. Exclusions

The trustees will not normally approve the use of the charities funds for:

4.1 Purposes for which the government has a statutory responsibility to provide for.

5. Grant Application Process

All Applications for grants should be completed in conjunction with this policy. They must be made using the application form, which can be requested via the charity's email address foundation@cooperassociatesltd.com and sent to: The Cooper Associates Foundation, 40 St James Buildings, St James Street, Taunton, Somerset, TA1 1JR

5.1 Information requirements before awarding a grant.

All Applicants:

Before awarding any grant to an organisation or individual, the trustees require that the application should:

5.1.1 Inform the trustees of the purpose of the application details of the project, the way in which the grant will be used and how it will be managed effectively for its intended.

5.1.2 Inform the trustees of the names of those who are to be involved with the project/work to be carried out and the identity of the person(s) who will be responsible for the administration of the grant.

5.1.3 Provide adequate information regarding the identity and financial status of the applicants and/or of the status of the person(s) who will carry out the project work;

5.1.4. Demonstrate that the recipient (whether an organisation or individual) has and will be adequately insured both in relation to any equipment and facilities purchased by the grant but also in relation to any risk of injury arising by reason of the project or purposes for which the grant is awarded including injury to those participating in that project or those purposes;

5.1.5. Sign the application form to state that the applicant (or in the case of applicants by persons under the age of eighteen years by his/her parent or legal guardian) undertakes to comply with the terms and conditions and all information provided by the applicant is correct.

6. Assessment Process

6.1 All grant applications will be subject to initial assessment to ensure they meet the basic criteria for funding. Applicants must be prepared to provide such other information as the trustees may reasonably require in order to assist them in their decision making.

Grants will be considered by the trustees at their meetings, and the trustees will aim to inform all applicants of the outcome within 3 months following assessment.

- 6.2 Applicants should note that as with many other charitable trusts, The Cooper Associates Foundation may receive far more applicants than it has funds to support. Even if a project fits within the criteria and priorities of the charity and a detailed assessment has been made, The Cooper Associates Foundation may still be unable to provide a grant.
- 6.3 The trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful.

7. Monitoring and Publication

7.1 It is the policy of the trustees to monitor all grants made. To this end, before a grant can be confirmed, conditions will be stipulated appropriate to the work to be carried out and progress will be assessed against agreed targets and/or milestones if the grant is payable in instalments, then payment of subsequent grant instalments will be dependent on satisfactory progress having been demonstrated and the trustees reserve the right to withdraw the grant on receipt of unsatisfactory progress reports. The grant recipient should inform the Foundation of any extenuating circumstances whereby the submission of any report is delayed, to allow a mutually acceptable date for submission to be agreed.

7.2 Monitoring visits by representatives of the foundation may be expected during the period of a grant.

7.3 The trustees also expect to receive any copies of published articles, papers and other public communication which may result from the project.