



Yeovil Lions Club CIO

Registered Charity N° 1177056



A Charitable Incorporated Organisation.

Grant Making Policy.

1. The objects of Yeovil Lions Club.

Under the terms of the Clubs Constitution the club will apply funds at its discretion, making grants where they believe that their contribution will make a real difference. The Club will normally make grants in furtherance of its charitable objects, the details of which are shown in the annex of this document. Our funds are raised by organising events to which the public are invited to attend for a fee.

2. Priorities for support.

The number of applications that can be supported is of necessity limited to the amount of funds available for distribution in any one year. The club has determined that the priority for funding will be;

- Subject to other elements of the grant making policy, no restrictions are imposed on the purpose for which a grant may be made, thus all applications for support are considered.
- As there are numerous Lions Clubs in the UK, applications from Yeovil and the surrounding area are generally given priority. The club also considers applications from wider afield, adjoining towns and collaboration with other Lions clubs. We also consider International funding requests referred to us by Lions Clubs International.
- Applicants for support or grants are all considered on their own merits, following investigation by the Welfare Officer and other committee members. Our funds are raised from the local community therefore requests for support from the local community are given special consideration. Areas that are commonly supported;
 - Local charities, youth groups, the elderly, learning difficulties, schools, hospitals, child therapy, foreign children visiting the UK, families in need and individual appeals.

The above is not a definitive list and each case is reviewed on its own merits. The club constantly review how they help the community.

3. Principles.

In awarding grants the Club will apply the following principles;

- The Club will not normally support applications from large national charities unless it is for the local branches use or charities deemed by the club to already be well funded.
- The club will work with other organisations to fund initiatives beyond the financial scope of a single organisation.

- All applications from previous recipients for grants or from previously unsuccessful applicants will be considered by the club on their own merits. The club will have regard to the outcome of the previous grant and any new application will not receive preferential or adverse consideration.

4. Exclusions

The club will not normally approve the use of funds for;

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

5. Grant application process.

Applications can be made to any member of the club, through our website or email then directed to the Welfare officer of the club for review. Once contact has been made with the club a paperwork trail must then be created for each application.

Before awarding a grant to an organisation or individual the club will require the applicant to;

- Inform the club 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 purpose.
- Provide adequate information regarding the identity and status of the applicant and or of the status of the person who will carry out the project or work.
- Demonstrate that the recipient whether an organisation or an individual, has and will be adequately insured both in relation to any equipment and facilities purchased by the grant and in relation to any risk of injury by reason of the project or purpose for which the grant is awarded.
- All equipment purchased with the grant is owned and remains the property of the grant recipient whether organisation or individual.
- We request that on receipt of the grant either by the club purchasing an item or by cheque acknowledgement is received by the club.
- To comply with the General data Protection Act, May 2018, applicants are required to consent to the use of any data supplied by them in the processing of their application is supplied with the individual's consent. This includes transfer to and use by such individuals and organisations as the Club deem appropriate.

6. Assessment process.

The assessment process will be that;

- All grant applications will be subject to initial assessment to ensure that they meet the basic criteria for funding. Grants will be considered by the club at their meeting and they will aim to respond by letter, phone, email or in person to all applicants informing them of the outcome of their application for funding within three months of the application.
- The club will not be obliged to provide an explanation to the applicant should their application be unsuccessful. However the club does realise the importance of feedback and will where appropriate provide suitable comments to the applicant.
- Applicants should note that the club receives far more applications than they have funds to support. Even if a project fits with the criteria and priorities of the club and a detailed assessment has been made the club may still be unable to provide the grant.

7. Monitoring and publicity.

It is the policy of the club to monitor at their discretion all grants made. Where the grant is for an extended period, project progress should be reported on a regular basis. In addition to report detailing progress, grant recipients would be expected to provide;

- A statement of how the grant monies have been spent, this may be by letter, phone, email or in person.
- Details of any other funds applied to the same project.
- The club may where appropriate visit the applicant to view the progress or success of the project and see how and where the grant has been spent.

The club will where applicable ask the applicant to consent to the use of their information and project details for publicity purposes which might include, letters, articles in the press, online or other media.



CHARITY COMMISSION
FOR ENGLAND AND WALES

Charity Name
Yeovil Lions Club CIO

No (if any)
1177086

CC16a

Receipts and payments accounts

For the period from	Period start date 01/07/2021	To	Period end date 30/06/2022
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Section A Receipts and payments

	Unrestricted funds to the nearest £	Restricted funds to the nearest £	Endowment funds to the nearest £	Total funds to the nearest £	Last year to the nearest £
A1 Receipts					
Charity	8,344	-	-	8,344	-
Admin	2,623	-	-	2,623	-
Fireworks/Events	3,321	-	-	3,321	-
YYAT	-	8,857	-	8,857	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total (Gross income for AR)</i>	14,288	8,857	-	23,145	-
A2 Asset and investment sales, (see table).					
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	-	-	-	-	-
<i>Total receipts</i>	14,288	8,857	-	23,145	-
A3 Payments					
Charity	4,123	-	-	4,123	-
Admin	1,940	-	-	1,940	-
Fireworks/Events	30	-	-	30	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	6,093	-	-	6,093	-
A4 Asset and investment purchases, (see table)					
	-	-	-	-	-
	-	-	-	-	-
<i>Sub total</i>	-	-	-	-	-
<i>Total payments</i>	6,093	-	-	6,093	-
<i>Net of receipts/(payments)</i>	8,195	8,857	-	17,052	-
A5 Transfers between funds	-	-	-	-	-
A6 Cash funds last year end	-	-	-	-	-
<i>Cash funds this year end</i>	8,195	8,857	-	17,052	-

Section B Statement of assets and liabilities at the end of the period

Categories	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B1 Cash funds		-	-	-
		-	-	-
		-	-	-
	Total cash funds (agree balances with receipts and payments account(s))	8,195	8,857	-

	Details	Unrestricted funds to nearest £	Restricted funds to nearest £	Endowment funds to nearest £
B2 Other monetary assets		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-
		-	-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B3 Investment assets			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which asset belongs	Cost (optional)	Current value (optional)
B4 Assets retained for the charity's own use			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-
			-	-

	Details	Fund to which liability relates	Amount due (optional)	When due (optional)
B5 Liabilities			-	
			-	
			-	
			-	
			-	

Signed by one or two trustees on behalf of all the trustees

Signature	Print Name	Date of approval