

# The Chacegrove Family Foundation

## Gifting Policy

*Guidelines for Recipients of Grants and Awards*

*June 2026*

|              |                                                        |
|--------------|--------------------------------------------------------|
| Policy owner | Chair of Trustees                                      |
| Version      | 1.0                                                    |
| Date adopted | Board approved                                         |
| Review date  | Annually                                               |
| Applies to   | All recipients of grants or awards from the Foundation |

### 1. Introduction

The Chacegrove Family Foundation makes grants and awards to charitable organisations, CICs and projects that align with its philanthropic purposes. In accepting a grant or award, recipients agree to the conditions set out in this policy. These guidelines exist to ensure that the Foundation's funds are used effectively and responsibly, that the Foundation can account to its trustees and the Charity Commission for the way in which its money is spent, and that a positive and collaborative relationship is maintained between the Foundation and the organisations it supports.

*These guidelines form part of the conditions of every grant or award made by the Foundation and should be read alongside the grant agreement letter or award notice.*

### 2. Acknowledgement and Recognition

#### 2.1 Acknowledging the Foundation

Recipients are asked to acknowledge The Chacegrove Family Foundation in all publicity, communications, and public-facing materials that relate to the funded project or award. This includes, but is not limited to:

- Press releases and media coverage
- Social media posts and digital communications
- Printed materials such as leaflets, posters, programmes, and annual reports
- Events and public presentations connected to the funded work
- Websites and online content relating to the project

Where acknowledgement is not practical or appropriate — for example, where the nature of the project requires anonymity — recipients should discuss this with the Foundation in advance, and an alternative arrangement may be agreed in writing.

## 2.2 Use of the Foundation's Logo

The Foundation may provide recipients with a copy of its logo for use solely in connection with acknowledging the grant or award. The logo must not be used:

- For any purpose other than recognising support from The Chacegrove Family Foundation
- In a way that implies endorsement of the recipient organisation's wider work, views, or activities
- In a modified or altered form without the Foundation's prior written consent

Use of the logo is permitted only for the duration of the funded project. Recipients must cease using the logo once the grant period has ended unless otherwise agreed. Any queries about logo usage should be directed to the Foundation's Chair of Trustees.

## 3. Reporting

### 3.1 Progress and Completion Reports

The Foundation values open and honest communication about the Individuals and projects it supports. Recipients are required to provide a written report to the Foundation either at the end of the project or annually — whichever comes first. The report should cover:

1. How the grant funds have been used, including a summary of expenditure
2. The outcomes and achievements of the project — what has been accomplished and for whom
3. Any challenges, issues, or changes of direction encountered during the project
4. What has been learned, and what the organisation would do differently
5. Plans for the continuation or sustainability of the project beyond the grant period, where relevant

Reports do not need to be lengthy or formally presented. While some words are needed, videos and other media are fine to use. The Foundation welcomes honest, straightforward accounts and is interested in learning about both successes and difficulties..

## 3.2 Website and Communications Summary

To help the Foundation share the impact of its grant making with a wider audience, recipients are asked to provide a brief summary of the project suitable for publication on the Foundation's website. This should include:

- A short description of the project (typically 100 to 200 words)
- One or more photographs illustrating the project or its beneficiaries, where available and appropriate
- The recipient organisation's logo, if they are willing for this to be used

The Foundation will not publish any material without the recipient's agreement and will respect any sensitivities — for example, where photographs of beneficiaries require consent or where the project involves confidential work. Recipients retain ownership of any materials they provide and grant the Foundation a non-exclusive licence to use them for the purpose of promoting the Foundation's charitable activities.

## 4. Use of Funds

### 4.1 Restricted Use

Grant funds must be used solely for the purposes set out in the grant agreement letter or award notice. Funds may not be redirected to other projects, activities, or purposes without the prior written consent of the Foundation. If a recipient wishes to make a significant change to the project — including its scope, timescale, or budget — they should contact the Foundation before making the change so that the Foundation can consider whether to approve it.

### 4.2 Restrictions on Administrative and Overhead Costs

Unless otherwise expressly agreed in writing in the grant agreement, grant funds must not be used for:

- Payment of salaries, honoraria, or other remuneration to officers, trustees, directors, or governors of the recipient organisation
- General administrative expenses or overhead costs of the recipient organisation that are not directly attributable to the funded project

Where a contribution to staff costs or overheads is an integral part of the funded project, this must be explicitly stated in the application and agreed by the Foundation before the grant is made. The Foundation recognises that small organisations may have limited capacity to absorb costs, and is willing to discuss reasonable arrangements on a case-by-case basis.

### 4.3 Prohibited Use of Funds

Under no circumstances may grant funds be used for any purpose that is:

- Illegal under the law of England and Wales or of any jurisdiction in which the funded activity takes place
- Contrary to the recipient organisation's own charitable objects or governing document

- Likely to bring the Foundation into disrepute or to conflict with its values and charitable purposes
- For the private benefit of individuals rather than for public or charitable benefit

*The Foundation takes its responsibilities as a grant-maker seriously. If a recipient is in any doubt about whether a proposed use of funds is permitted, they should contact us before proceeding.*

## 5. Accountability and Repayment

Recipients of funds and grants will confirm that they have appropriate safeguarding and data management policies and practises in place, Noting that the holding of data about individual recipients within a grant to an organisation is likely to be held by not recipient organisation, not the foundation

The Foundation reserves the right to request the return of grant funds — in whole or in part — if:

- Funds have been used for purposes other than those agreed
- A recipient fails to provide the required reports within a reasonable time of being asked
- A recipient provides information that is found to be materially false or misleading
- The funded project does not proceed or is significantly curtailed without the Foundation's prior agreement

The Foundation will always seek to discuss any concerns directly with the recipient organisation before taking formal steps to recover funds, and recognises that circumstances can change in ways outside a recipient's control.

## 6. Contact and Further Guidance

Recipients are warmly encouraged to stay in contact with the Foundation throughout the grant period. We are interested in the work we fund and are happy to hear from you — whether to share good news, flag a difficulty, or ask for guidance on any aspect of these conditions.

All correspondence relating to grants and awards should be addressed to the Chair of Trustees, whose contact details are provided in your grant agreement letter.

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*Thank you for your partnership with The Chacegrove Family Foundation.*