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KSHETRI WELFARE FOUNDATION UK GRANT MAKING POLICY

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Kshetri Welfare Foundation UK
25 Balham High Rd, London SW12 9AL, UK

Purpose

1. Kshetri Welfare Foundation UK (KWFUK) primarily is not a grant maker, however, one of its objectives is to provide financial assistance to those who are in need. In line with its objectives, this grant making policy sets out the principles, criteria, priorities and processes that governs how the KWFUK provides financial assistance to activities that are exclusively charitable and fall within the objects of the charity. This will be applied to any financial assistance and will depend on the nature of the grant application and will be decided by the KWFUK's Trustees on a case-by-case basis.

Systems and Procedures

2. This grant making policy ensures that the trustees have appropriate systems and procedures in place. Specifically, it:
- Allows trustees to set priorities for funding, which they may change or depart from at their discretion.
 - Requires sufficient detail in the grant application and monitoring procedures, to enable the trustees to identify, assess risks and make informed decisions.
 - Enables the charity to carry out appropriate due diligence on individuals applying for grants.
 - Ensures grants are authorised by the trustees and that it ensures appropriate oversight and scrutiny.

Governance

3. The Trustees govern the KWFUK's Grant Making by setting:
- a. **Grant-making principle.** This ensures that decisions are ultimately made by the KWFUK's Board of Trustees, furthering its charitable purposes for public benefit and retaining discretion over funding in a fair and reasonable way.
 - b. **Grant-making criteria.** This sets out the activities the Trustees wish to support in furtherance of the KWFUK's objectives.
 - c. **Grant-making Priorities.** This sets out as to which beneficiaries should be the priority in receiving the grant.
 - d. **Grant-making processes.** This sets out how decisions are reached for awarding grants.

Grant-making Principle

4. The grant-making will be governed by the following principles:

- a. Applications for the grant will be considered on their own merit, regardless of previous rejection or receipt of grants.
- b. The Trustees have ultimate responsibility for all grant-making decisions in line with the KWFUK's charitable purposes.
- c. The Trustees also reserve the right not to approve any recommendation or nomination if, after due consideration, it determines that the resulting grant would not be charitable or would conflict with the KWFUK's stated policies or damage its reputation.
- d. The Trustees will not approve/support applications for activities which appear to, or actively seek to, influence public opinion in favour of a particular political party or promote political partisanship.

Grant Making Criteria

5. The aim of the grant-making criteria is to provide clear information from the KWFUK's Trustees to those individuals who want to apply for grants. A clear guidance on criteria for applications is a part of this policy and set out in Appendix 1. Additionally, further guidance can be sought out by emailing: Kshetriwelfarefoundation@gmail.com or by visiting KWFUK's Website: [Kshetri Welfare Foundation UK – KWFUK](#) (this is a work-in-progress).

6. KWFUK intends to consider applications that fall within its charitable purposes and meet its funding criteria and for which, the due diligence process will be adhered to.

- **Grants to individuals.** In making financial assistance, trustees will comply with Charity Commission guidance, to ensure that grants are provided in line with KWFUK's purpose, conduct regular audits to ensure that any money is spent in accordance with the application and all financial actions/decisions are recorded in the minutes.
 - KWFUK may make one off small grant to individuals to meet a particular need, or in response to a crisis, disaster or poverty in the UK or Nepal. For example, grants for bedding, clothing, essential domestic appliances, energy, water bills and repairs.
 - In Nepal, where education and healthcare may not be free to everyone, KWFUK may also make grants to enable people to access basic healthcare or schooling, which would otherwise not be affordable. This may include grants to pay for medical treatments and medicines, or books or other educational supporting materials.

Grant-making Priorities

7. A number of applications that can be supported by KWFUK will be limited by the amount of

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funds available for distribution within the financial year. In line with its objectives, the KWFUK Board of Trustees will determine the priority for funding on a case-by-case basis. Trustees may from time to time decide to review this policy and firm up the priority lists based on the requirement.

8. **Limitation.** KWFUK does not set any limits on the amount of funding that may be made available, but trustees will decide on their capacity if required by their majority voting. KWFUK's funding will be limited to and, inevitably, KWFUK will be able to make one off only small grant. In exceptional circumstances, KWFUK may make repeat grants. Grants will be made based on the funding availability, sustainability and solely based on merit. Trustees will ensure that all cases are assessed and although there will be no formal limit, KWFUK will ensure a degree of parity for those worthy applications.

Grant making processes

9. Applications will be considered by KWFUK's Board of Trustees, who work to the [Charity Commission C27](#) guidelines on trustee decision making. Grants are awarded entirely at the discretion of the trustees which will be transparent, addressing the interests of applicants. The Trustees' decision is final. To this end, all grant requests will go through a three-stage process as summarised below:

Stage	Process
Stage 1 Application	All grant applications will be subject to initial assessment of the Trustees to ensure they meet the basic criteria for funding. Requests that cannot be allocated to live funds are rejected.
Stage 2 Assessment	Trustees determine whether the request should be shortlisted for support. Shortlisted applications will be reviewed by the Trustees and taken to the next stage.
Stage 3 Decision	Requests not shortlisted are rejected. Grants not recommended are rejected, unless carried forward to the next financial year. All grants must be approved/confirmed by the Trustees.

10. The KWFUK Trustees will aim to write to all applicants informing them of the outcome of their application for funding within 90 days from the bid deadline.

11. Applicants should note that, as with many other charities, the KWFUK may receive far more applications than it has funds to support. Even if an application fits within the criteria and priorities of the KWFUK and a detailed assessment has been made, the KWFUK may still be unable to provide a grant.

12. The Trustees will not be obliged to provide an explanation to the applicant should their application be unsuccessful.

Monitoring, Reporting and Publications

13. Where financial assistance or grant is provided all grantees will be required to provide a report on how their grant was used and the impact the grant had. The content and nature of information to be reported will be appropriate for the size and type of grant awarded. The trustees of KWFUK will monitor such reports to not only ensure that grants are being used for

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the purposes intended, but to also assess the impact grants have made. This learning will be used to inform future decision making and policy to maximise the charity's impact.

14. Monitoring visits by representatives of the KWFUK may be expected during the period of a grant.

15. Grantees may be asked to take part in any publicity for the promotion of KWFUK and its work which may include – but is not restricted to – their name and photograph being used and publishing their work in the anthology and excerpts on the KWFUK website.

16. Individuals cannot publicly use the KWFUK's name to acknowledge its funding until this has been approved / agreed with KWFUK.

17. Following the conclusion of the work, the grant recipient will (where appropriate) be expected to submit a final report including receipts. The grant recipient should inform the KWFUK of any extenuating circumstances whereby the submission of the final report is delayed, to allow a mutually acceptable date for submission to be agreed.

18. **Amendments.** The Trustees may vary the terms of this policy from time to time.

Submission of Grant Funding Applications

19. Detailed guidance on Submission of Grant Funding Application is provided in Appendix 2.

Remedies

20. In the event that the grantee fails to comply with our grant policy or other instructions in their grant agreement, action may be taken, such as

- a. Rescinding the grant agreement; or
- b. Refusing to accept the provision of any further services and to require the immediate repayment of some/all sums previously paid.

Data Protection

21. Applicants' data will be held in accordance with data protection legislation. It will be held securely, disclosed if subject to an access request, treated as confidential, only used for the purpose for which it has been provided and destroyed, once no longer needed.

Safeguarding

22. In making grants, KWFUK will comply with Charity Commission guidance by carrying out relevant due diligence and having a written agreement that sets out:

- Our relationship.
- Monitoring and reporting arrangements.

Checks and Due Diligence

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23. The KWFUK will carry out sufficient due diligence on grant applicants to confirm the identity of the applicant and that:

- Any funding will be applied in accordance with the charity's charitable purposes.
- Funds will not be knowingly used for illegal purposes, such as money laundering, bribery or financing terrorism.
- The applicant does not hold views or have any involvement in activities contrary to the charity's values and charitable purposes.

Promotion

24. Often those that KWFUK intends to reach out to are the least able to research and find KWFUK and to make effective applications. Consequently, it is important to ensure that those KWFUK is seeking to reach are made aware and that the application process is kept as simple as possible, ways in which people can be made aware include promotion:

- Via websites, social media, members, local community groups.

Safety

25. **Safeguarding.** Applications are to include details of the procedures used to ensure people are kept safe from harm and how management ensures these are applied consistently. These must comply with the charity's safeguarding policy and legislation and any regulation specific to the activity.

APPENDIX 1: GUIDANCE

1. **What We Fund.** The information below provides guidance on how to make an application for a grant from the KWFUK.
2. **Who are you?** Briefly explain who you are, in no more than a few sentences. Individuals should be prepared to provide information on solvency, current employment status and living arrangements.
3. **What do you want to achieve?** Please be specific and consider the following key points:
 - a. What and how? What do you want to achieve with the fund? How does it fit within KWFUK's funding priorities? What charitable purposes will your work promote? It is important to give a clear sense of the goals and processes. What will you be doing? What is the timescale? Are you a new applicant?
 - b. **Impact.** What will be the impact if your application is not successful.
4. This guidance paper may not cover every eventuality. Therefore, once the information has been read carefully and you have further queries then please contact the KWFUK Trustees by sending an email to Kshetriwelfarefoundation@gmail.com about your application. You should do this well before the funding is required.
5. Please note KWFUK will try its best to respond to your e-mail promptly. Please do not contact individual Trustees about your application at any stage of the process. If you do so the application may be discontinued.
6. **How do I apply?** KWFUK is a relatively new charitable organisation. It does not have an online application system running yet. Therefore you are requested to complete Appendix 2 to this document and submit it by e-mail to Kshetriwelfarefoundation@gmail.com with relevant supporting documents.
7. **When will I get a decision?** KWFUK intends to take up to twelve weeks to make a decision. KWFUK will inform the applicant as to whether or not their application has been successful. If the Trustees think your application might be suitable but deliberations will take more than twelve weeks, KWFUK will contact you accordingly.
8. **Grants.** Subject to the availability of funds, the Trustees will assess all cases individually and make their final decision whether to provide support to individuals. The following are the key areas that the KWFUK will look to provide support:
 - Those in need of financial assistance due to:
 - The impact of natural or human-caused disasters or other crises
 - Life-threatening medical treatment / medical bills
 - Poverty
9. If you have a special case which is not listed above and you think it fits within KWFUK's purpose and is charitable then e-mail us at Kshetriwelfarefoundation@gmail.com.

KSHETRI WELFARE FOUNDATION UK
APPLICATION FORM FOR FUNDING

1. Have you read our Grant making policy? (a) Yes (b) No
If your answer is No, then please visit Kshetri Welfare Foundation UK – KWFUK for more information otherwise please continue with this application.
2. APPLICANT DETAILS
Full name:
Full Postal Address:
Contact telephone number:
E-mail:
3. DETAILS OF HOW THE GRANT WILL BE USED
Location?
Which of the following objectives of KWFUK will the grant go towards: a. Health b. Poverty c. Education
How will the grant benefit you and what is the impact of your application not being successful?
<i>(use continuation sheet where necessary)</i>

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How many individuals will benefit from the grant?
Please describe how you will try to ensure funds are spent as effectively as possible to achieve the objectives?
<i>(Use continuation sheet where necessary)</i>
4. FINANCIAL DETAILS
Please detail your solvency, employment status and living arrangements.
Amount requested from KWFUK?
Note: Completed application form must be submitted to: Kshetriwelfarefoundation@gmail.com together with a copy of narrative proposal as recommended at paragraph 3 of Appendix 1 (Guidance)

Continuation Sheet
