



A2: Our grantmaking principles and policies

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Grantmaking principles across the MS Society

We have a responsibility to target our resources to those affected by MS who are most in need. We also need to make sure we manage our resources responsibly. To help us do this, we have developed some key principles that apply to both branch and national grantmaking.

Helping everyone affected by MS

Our **constitution** says that we will help anyone with MS, whether or not they are a member of the MS Society. Our grants are equally available to members and non-members.

**Find out
more**

You can find our **constitution** and other important documents:

- on our **volunteer website**,
<http://volunteers.mssociety.org.uk/ms-society-policies-and-documents>
- by requesting a printed copy from the **Volunteering Team**

There are many reasons why someone may wish to become a member, such as to join a social or support group, to meet other people affected by MS, or raise funds for the MS Society.

However, there are also many reasons why a person may choose not to join. It may be that they are still coming to terms with their MS, they are keeping their diagnosis secret from friends and family for now, or simply that they are not the type of person who becomes a member of a formal organisation. We must respect their choice and it must not affect their application for a grant.

You may even find that some applicants become a member of your branch after receiving a grant!

Top tip: Ensuring people beyond your membership know they can apply for support grants can be challenging. See [B3: Reaching people](#) for a range of ways to publicise MS Society financial support in your local area.

Fairness

Branches must clearly define the type of financial assistance they will provide, and make consistent decisions about requests for grants.

Setting a **branch grantmaking policy** helps to ensure fairness and clarity in your grantmaking. It must be used to assess all requests for grants and be made available to anyone that asks to see it,

Forming a **grants sub-committee** to assess grant requests will make decisions more consistent, whilst respecting confidentiality. The assessment must be based on a person's needs and circumstances. Don't be influenced by things like whether you know the applicant, or their personal lifestyle choices.

Top tip: [B1: Developing your grantmaking policy and processes](#) will give your branch the knowledge and tools to meet our grantmaking standards.

Confidentiality and data protection

Applying for financial assistance is personal and involves providing sensitive information. We have a duty to protect personal information given by applicants and to treat all applications confidentially and sensitively. All information given is subject to the **Data Protection Act** and there is a statement on all grant application forms that applicants must read and sign.

Find out more

Learn about our **data protection policy**:

- on our **volunteer website**, <http://volunteers.mssociety.org.uk/data-protection>
- in our **Committee Handbook**, [B8 - Data protection](#)
- by requesting support from your **Local Networks Officer**

Your grants sub-committee must make sure only those making grant decisions have access to personal information. When grants are reported back to the full committee, they must be anonymised.

Top tip: You can find a list of all volunteer website resources referred to in the **Support Grants Handbook** in [Appendix 2: Volunteer website resource index](#)

You'll also find the answers to common queries about grants in [Appendix 9: Grantmaking frequently asked questions](#)

Accountability

As an organisation, we need to show that we have spent our resources appropriately and effectively. Local and national expenditure must be formally accounted for and reported on annually, to meet financial regulations and legislation. To do this locally, all branches must have a formal process for awarding, recording and reporting on their grantmaking. Branches must have a branch grantmaking policy, and complete and return the MS Society annual branch grantmaking pro forma.

Value for money

The MS community, including branches, works incredibly hard to raise funds to benefit people affected by MS. We therefore have a responsibility to award our grants wisely and consider value for money when assessing grant applications. We have limited resources and need to target funds towards meeting the most essential needs.

We ask for at least two quotes to make sure a competitive price has been found. Sometimes applicants ask for expensive items, and we need to consider whether this is a preference or if this meets an essential need. We ask for a letter of support to help us identify what is essential and what is an individual's preference.

Top tip: See [Appendix 8: Letters of support required](#) for more on the information required from health and social care professionals and others to support grant applications.

Grantmaking policies across the MS Society

We have developed key policies that apply to both branch and national grantmaking. This is to ensure we use our resources as effectively as possible and that we comply with relevant regulations and Charity Commission guidance.

Retrospective policy

Except in exceptional circumstances, the MS Society cannot award a grant where an applicant has already placed an order or paid money towards an item. If someone has already paid even a deposit, it suggests that either, a) they felt able to meet the expense, or b) they may have put themselves at financial risk by committing to purchases they could not afford with the expectation of receiving a grant that may not be awarded.

It can be very difficult to have to say no to an applicant who has already made a payment, and has then found out about our grants, but this rule should still apply, other than in very exceptional circumstances. For example, an exception could be if someone has an unexpected and significant change of circumstances, such as becoming unable to work after a relapse. They may have placed a deposit on something, expecting to be able to pay the balance, only for their financial circumstances to have changed.

Top tip: You can find a full copy of this policy in [Appendix 3: Retrospective grant applications policy statement](#). You can also contact the **Grants Team** for support.

Loans

The MS Society cannot provide loans. We are not regulated to do so and do not have the resources to administer a loans system. Grants do not have to be repaid. If a person wishes to repay the grant, this should be treated as a donation to the branch, or to the MS Society through our **Supporter Services Team**.

Top tip: Contact details for staff referred to can be found in [Appendix 1: Sources of support](#). Job titles rather than names are used so that this publication doesn't date when somebody leaves their post.

Financial criteria

In order to help us to direct our resources to those most in financial need, we have savings limits in place for each of the grants we award. The majority of applicants have little or no savings, and while we acknowledge that people with savings over these limits may feel it is unfair, we need to prioritise our funds.

Our savings limits are in line with capital rules for means tested benefits and local authority charging for care homes, which is why there are different limits for Individual Support Grants and Short Breaks and Activities Grants. The limits are explained in **Part C** of this handbook.

Unless an applicant receives one of the means tested benefits listed on the application form, they are asked to provide their income and outgoings. If they

receive one of these benefits, it shows they have been through a means test and are on the most basic level of income.

It is impossible to have a cut off level of income, because we look at each individual's circumstances, which can vary enormously. However, this information gives an overall picture that we can use to prioritise requests. If an applicant has a much higher income than their outgoings, we would generally expect them to contribute towards the cost of their request.

Statutory funding

Local authorities and health services have a statutory duty to provide assistance to disabled people, and as a charity, we cannot replace this funding. The most common items that may be funded are home adaptations and wheelchairs, and sometimes equipment (through social services or health services). See [C1: The Individual Support Grant Fund](#) for more information.

Statutory funding is generally means tested, so even if a person's needs are eligible for funding, they may not meet financial criteria. In this situation, we can consider a grant.

Further information on the duties of statutory authorities can be found in the **Disability Rights Handbook** or is available from the **Grants Team**.

Disability Rights Handbook

The **Disability Rights Handbook** is updated every year and provides clearly written, in-depth, information on the entire benefits and independent living system. We recommend all MS support teams have a copy to refer to.

You can order yours from <http://disabilityrightsuk.org/> or by calling 020 7250 8191.

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Content owner:	Grants Manager
Editor:	Projects Officer (Services and Support)
Signed off:	July 2015
Review date:	July 2016

Multiple Sclerosis Society Registered charity numbers 1139257/SCO41990.
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