

How will your grant scheme operate?

- ✚ Consider the type of grant scheme. For example, should the grant be revenue-related, a capital scheme or an interest relief grant?
- ✚ Develop clear terms and conditions for your grant scheme that will ensure that your objectives will be met without being unduly onerous in terms of monitoring.
- ✚ Ensure that all your terms and conditions are thoroughly vetted by your legal team.
- ✚ Consider how your organisational structure can best be adapted to facilitate the various functions in the grant-giving process.
- ✚ If appropriate establish a recruitment and training programme.
- ✚ Establish a robust and flexible database that will meet not only current requirements but also likely future requirements and ensure that you have the necessary in-house IT expertise and systems in place.
- ✚ Develop a promotional strategy to ensure effective take-up.
- ✚ Ensure that the initial application process filters out inappropriate and ineligible applications, and that the application form is coherent and logical.

- ✚ Ensure that statutory commitments and other legal requirements are satisfied for each application e.g. health and safety, planning permission, building regulations, title to property, fire certificates etc.
- ✚ Ensure a strict verification process, where possible using binding third party verification.
- ✚ Consider whether you have a regional structure that would facilitate the appraisal process.
- ✚ For larger projects consider making it a requirement that applicants provide clear progress reports.
- ✚ Put in place an effective complaints structure to deal efficiently with rejected applications.
- ✚ Wherever possible use a simple series of checklists to ensure that procedures are followed.
- ✚ Provide clear and workable guidance to applicants on timing of applications.
- ✚ Ensure clear project management and lines of reporting/ communication, both internally and with applicants.
- ✚ Make provision for regular review meetings to fine-tune and enhance the grant-making process.

- ✚ Decide how the drawdown of the grant will be distributed, ensuring that at least some of the grant is withheld until the project has been completed and inspected.

- ✚ Before final payment ensure that you have received a valid completion report.

- ✚ Don't forget to adequately resource the payment system/infrastructure.

The Lewis Clare Partnership specialises in the outsourcing of grants administration. We undertake work in all aspects of the grant-making process, including the initial setting up of schemes, the appraisal of projects and the monitoring and evaluation of grants. If you would like to discuss how we can help your organisation, please call +44 (0)20 8255 7353 or visit www.LewisClare.com