Developing a Fund Strategy

1. The value of a fund strategy

An essential step in the community benefit process is to get some consensus on what the benefits package will be used for and how it will be made available. A community action plan forms a key element of the fund strategy and can support discussions and decision making on the package of benefits offered by renewable energy businesses. This toolkit sets out a methodology to incorporate a community action plan into a strategy for the disbursement of an annual fund (see *Creating a lasting legacy* module).

Where an annual fund is involved these will usually operate for the lifetime of the renewables project, perhaps 25 years if an onshore wind farm or 40 years if a hydropower scheme. This means that, especially where large sums of money are involved, the community can begin to think about and plan for long term outcomes that the Fund might bring about, and how it can support long-lasting positive change and sustainability for the community. Developing a strategy for the community benefit fund that is based on locally identified needs and opportunities can help to ensure the Fund delivers this kind of legacy.

From a community development perspective, this can be best achieved if it is informed by a meaningful process of local consultation that results in the creation of a plan for the community, usually referred to as a 'community action plan' or 'community development plan'.

Informed by the outcome of that consultation and the resultant plan, the community, in discussion with the renewable energy business, can then develop a strategy to guide effective distribution of the Fund towards activity that will contribute to the community's vision. This strategy should set out the Fund's purposes, and any more detailed local priorities within those, based on the community action plan. It should provide details about who can receive funding – whether that means constituted or un-constituted community groups that are working to bring about benefit locally, registered charities, private businesses, individuals, or a mixture of these.

The Fund Strategy should also determine how funds will be made available and how proposals for specific projects or activities will be identified and/or selected for funding. In selecting such distribution methods, consideration needs to be given as to whether and how they can encourage and enable the most positive impact to be delivered from the Fund, measured against its identified purposes.

The Fund Strategy may be developed before, after, or at the same time as determining the governance and administration arrangement for the Fund (see module *Getting the Governance Right*).

2. Creating the fund strategy

Having completed the community action planning, it is now important to come back to consider the specifics of the Fund and what role it can play in helping achieve some of the what is in the plan. Hopefully the financial value of the Fund will be clear by this stage, as will any particular themes or priorities that the renewable energy business has a preference for. These will also inform the Fund Strategy.

The Fund Strategy should, as a minimum, provide clarity on the following:

- The key purposes or outcomes that the Fund will be directed towards, and any specific priorities within those
- What the Fund cannot support, often referred to as 'exclusions'
- Any other criteria that will be used to decide what type of projects or initiates the Fund will support
- Who can be funded, often referred to as 'eligible bodies'
- How the funding opportunity will be made available (the distributing methods), and how frequently.

These are each explored in greater detail in the rest of this module.

An example of a summarised version of a Fund Strategy (referred to as a Fund Factsheet) is available here.

2.1 Fund purposes / outcomes and priorities

Fund purposes or outcomes are broad statements setting out what type of change the Fund will seek to achieve and therefore providing some overall parameters in terms of the types of projects or initiatives it will support. Ideally, these should be drawn from the headline themes or outcomes in the community action plan. This helps to evidence that the Fund Strategy is grounded in a wider plan for the community.

It is important to word the purposes / outcomes carefully, ensuring they give clarity about the change or difference that is desired. They should be broad enough to encompass the entire range of (permitted) activity that could bring about that change. If there are specific types of activity or projects that are desired, these can be set out further as priorities underneath each purpose or outcome. Anything that might contribute to the purpose or outcome but won't be supported can be set out under 'exclusions' (see section 2.2 below).

Any particular purposes or priorities that the renewable energy business has a preference for will need to be considered too. These may be already set out in the Community Benefit Agreement the community has with them and are sometimes referred to as 'Permitted Purposes'. Ideally, the themes emerging from the community action plan and any Permitted Purposes will overlap. Where there are exceptions, further discussion with the renewable energy business may be necessary.

It is also very useful at this point to know whether the renewable energy business wishes to have the Fund classed as a charitable donation for their own taxation purposes, and/or whether any community body or third party administrator who will hold and oversee the Fund has charitable status. Both instances will mean the Fund can only be used for charitable activity. This will have a bearing on the range of activity that can (and cannot) be supported by the Fund, and how the Fund purposes or outcomes should be worded. Guidance on what types of activity are deemed charitable is available at the Office of the Scottish Charity Regulator.

Bear in mind that community benefit funds, as long-term, flexible and non-statutory funding streams, are unique. They can therefore be used to catalyse sustainable income earning projects for communities. For example, community renewable projects or other enterprises that will earn income for the community. This requires the Fund Strategy to allow for investment in the initial, higher risk stage of such ventures and to reflect a long term and entrepreneurial mind-set as to what can be achieved. This kind of strategic opportunity and entrepreneurial thinking needs promoted and ideally embedded in the strategy at the outset.

2.2 Exclusions

The Fund Strategy should also make clear what the Fund will not support. This may be specific types of organisation, costs or types of activity. Exclusions may have been suggested during the community planning process, but there are also likely to be things that the renewable energy business has stated the monies cannot be used for. Common examples are spend: on the promotion of activity that is exclusively religious or political, that is contrary to the business interests of the renewable energy business (e.g. campaigns against renewable energy) and the delivery of statutory duties.

Again, if the Fund is to be charitable in nature, this may also restrict the purposes to which monies can be applied - see section 2.1 above. It is a good idea to state clearly in all of the Fund material that only charitable activity can be supported through the Fund, where this is the case.

2.3 Using additional themes or criteria to add value

As well as identifying the overall purposes and priorities that the Fund will be directed towards, the strategy can also set out how projects seeking funding should be delivered in a way which adds value in community development terms. Encouraging – or even requiring – those seeking funds to think more broadly and creatively about the way their projects or activities are designed can help achieve greater impact while avoiding duplication or inefficiency. In other words, it can deliver more value for money from the Fund. Some things to consider include:

Matched funding / leveraging further resources: Community benefits can provide opportunities to lever in “matched funding” from other sources dependent on the type of project in question. Therefore, to ensure the community fund achieves the greatest impact, it should not displace such monies nor, ideally, should its availability reduce community groups’ commitment to generating their own funds from local fundraising. For example, local events that also contribute to a vibrant community calendar and promote community spirit. So, while community funds can usually offer up to 100% of project costs, it may still be important to ask groups to demonstrate that other funding sources for their project have been explored and perhaps indicate that, where competition for funding is high, those proposals sourcing a percentage of the total project cost from elsewhere are more likely to be funded. This might mean applicants raising some funds through their own events or online fundraising, charging for services or products, or securing grants from other sources.

Financial sustainability: Where a group is seeking funding for a project or activity that will continue beyond the life of the grant, it is prudent to ask how they see that ongoing activity being funded. Do they have a plan for it to become sustainable in the future without the need to rely on further grant funding? And is it realistic? Might they enter into an agreement (for example with local businesses or the local authority) to continue providing services, or bring in funding through other kinds of trading? If they are asking for a lot of money from the Fund, this becomes even more important. Many communities will wish to avoid their funds being used to support groups that will simply come back to ask for more funds year-on-year to keep running the same activity or service. To do so could either reduce the Fund’s ability to support new ideas and opportunities or, if ongoing funding is not provided, place the Fund (and the group that makes decisions on what is funded) in an unfair position of perceived responsibility for the closure of a project or service that the Fund has supported at some point previously. However, in some cases communities may be happy to support the same activity annually, for example where this brings clear benefits for a broad cross section of the community or a particularly disadvantaged group.

Environmental sustainability: Community benefits can play a role in ensuring local projects meet their wider environmental responsibilities and some may even become exemplar projects in this regard. Those seeking funds can be encouraged or required to consider the environmental impact of the project or activity for which they are seeking funding (and perhaps of their organisation’s activities generally) and demonstrate how they will address this. This might include asking them to:

- Provide an environmental policy adopted by the organisation
- Explore opportunities for the provision of environmental education through the project
- Share, re-use or re-cycle resources
- Minimise consumption of non-renewable materials, including energy and fuel, for example by encouraging cycling or walking, or installing insulation in a community facility.

Where the proposal is for funds towards the costs of a new building or refurbishment of an existing building, this should be based on sustainable design principles; considering carbon costs across the full lifecycle of the building, energy efficiency, use of environmentally benign materials and on-site renewable energy generation.

Local procurement: Opportunities to support the local economy should be maximised, increasing the local benefit from the Fund by retaining spend in the area. Those requesting funding could be required to explore potential local suppliers and favour those for the provision of goods and services, where appropriate (e.g. in terms of quality of products / services available) and feasible (in terms of availability and cost). The term 'local' will vary depending on the nature and availability of the goods or service in question. In some cases, it could be taken to mean within the Fund's area of benefit, but in others the wider area or region might be most appropriate. However, a balance is of course required, and it should be incumbent on groups applying for funds to demonstrate value for money in their procurement of services and goods; if local suppliers are a good bit more expensive than others with no reasonable justification, then clearly they may not be favoured.

Building community assets / capacity: Most projects can, with some creative thinking, provide opportunities to tap into and build on the skills, interest and knowledge of local people and groups. Those seeking funding could be encouraged to consider (or required to demonstrate) how their proposed project will increase the involvement of local people around their skills and interests, build on these, and enable them to make a meaningful contribution to their community, whether this is anticipated as a key outcome for the project or not. This might involve: Providing opportunities for people to volunteer and/or showcase their skills, encouraging and supporting them to develop their own community activities and projects, transfer of skills and knowledge through shadowing, mentoring or coaching, or partnerships between experienced organisations (including external agencies) and less experienced groups. An example of this kind of activity is Ochil Youth Communities Initiative (OYCI) a youth development project where the young people themselves research, select, plan, deliver and evaluate activities with their peers. The young people involved have become empowered to take forward more of their own activities each year. Further information on this type of asset-based approach to community development is provided in the module *Understanding the Community Context*.

Collaborative/ partnership working: the development of partnerships or greater collaboration between local groups, or between those groups and external agencies, can help to bring added value for money. Those requesting funds could be encouraged to consider whether working with others could bring a more efficient and impactful way of delivering their project or service - for example increasing its reach, building the capabilities of the group, or improving overall financial efficiency - and demonstrate how they have explored this. This could involve working with voluntary, private or public sector bodies that operate at local, regional or national level. Kyle of Sutherland Development Trust is an example of this, delivering a range of local regeneration projects with community benefit funding in partnership with The Highland Council, Highlands and Islands Enterprise, local businesses and others.

2.4 Who can receive funding?

Consideration will need to be given to who is able to receive funding, taking into account who is best placed to deliver against the Fund purposes as well as any restrictions around private gain form the funding. The Fund Strategy (and the published materials aimed at supporting those who are seeking funds) should set out some basic eligibility criteria, stating for example:

- The type of body/ applicant that may apply to the Fund
- Any award must bring clear and direct benefit to a defined group of people in the Fund area of benefit
- Any supporting documentation required, such as a written constitution, latest set of accounts (perhaps requiring these be independently examined), and evidence of a bank account in the name of the body/ applicant.

In most cases, bona fide community organisations, i.e. those **constituted on a not-for-profit basis**, will be well placed to deliver activities or projects that meet the Fund's purposes. Appropriate checks will likely be required, for example through examination of their constitution, for features such as:

- Whether the group's purposes / aims are for public benefit;
- The existence of a not-for-profit "asset lock" (see the Annex on *Governance Arrangements* for a definition of this);
- Who can become involved in the organisation's governance and how, and
- How accessible their services are.

Although insisting that recipients of funds be **registered charities** can provide some level of assurance as to the public benefit of their activities (in light of the level of scrutiny and regulation applied to charities by the Office of the Scottish Charity Regulator), this requirement is generally not encouraged as it disqualifies a large number of generally smaller, grassroots groups from benefitting. If the Fund has been deemed charitable it is far more inclusive to simply stipulate that the purpose of the Fund, and therefore any activity to be funded, must be charitable in nature, and for this to be scrutinised during any due diligence or project assessment process (see the annex *Guide to open grant making*).

Most communities will wish their funds to bring about broad benefit to the whole community or specific groups within it, rather than private gain to individuals. Nonetheless it may be appropriate to fund individuals and private business in some circumstances, where any private gain is outweighed by the public benefit of doing so.

Many communities will have an ambition to improve or sustain their local economy. **Small, locally owned businesses** are often the lifeblood of rural economies, and supporting them may therefore be important. If a fund has been established on a charitable basis, funding can nonetheless be directed to businesses where they can demonstrate that the investment meets the Fund's purposes, provides clear public benefit, and the activity would not take place without the funding. The investment should not, however, risk displacing or damaging other local businesses. Some communities prefer for funding for private businesses to be on a re-payable basis (see 2.5 below), particularly where the amount of funding sought is significant and the business is likely to be able to repay it.

Some purposes may be best delivered by funding **individuals**. Where the Fund is charitable in nature, care needs to be taken here to ensure that funding is genuinely needed (for example, the individual is in hardship) and that it will be used for activity that brings about some kind of wider public benefit. Example include cultural, sporting, scientific, or artistic pursuits, or educational activities that will further the individual's chances of securing and/or sustaining gainful employment. One way of limiting the risks involved here is to provide small grants or bursaries up to a certain value, and to require applicants to share back with the wider community on what they used the award for and the learning or achievements that resulted.

However, where a community benefit fund is not charitable in nature, some renewable energy businesses and communities may be comfortable that funding is used to provide an element of private benefit where this is available to everyone living in the Fund area of benefit. For example, through a Local Energy Discount Scheme (LEDS) that is not targeted specifically at those in fuel poverty.

2.5 Choosing effective distribution methods

There are a number of different ways in which funds can be made available. Consider whether an open grant application process, commissioning specific services or infrastructure projects, participatory budgeting, bursaries for individuals, or repayable grants are most appropriate. Some of these distribution methods are fairly new and practice in using them is evolving.

The choice of distribution method(s) will depend on the Fund purposes and any priorities within those, and whether these lend themselves to certain options. Are monies to be targeted to particular themes or projects from the outset? Beyond that there are a range of other factors to consider, as follows.

a) Key factors to consider

Accessibility: whether funds are to be made available on an open, competitive basis and how this will be done. Consider how many 'eligible bodies' there are in the Fund area of benefit that may be able to deliver on the Fund's purposes or priorities. If there are a number, then this may lend itself to an open grant programme (see below) of some type.

Consider also whether the Fund disbursement arrangements allow for a timely response to new needs and opportunities as these arise. It may be that an emergency situation (such as closure of a key local facility or natural event like a storm or flood) or a significant opportunity (such as for investment in a community renewables project) happen or emerge, requiring a response in a short timescale. Ideally the Fund Strategy will allow for an appropriate response, including making awards or investments outside of any regular schedule of 'rounds'.

Efficiency and proportionality: The amount of time and effort associated with the distribution method; for those setting it up and providing the ongoing administration associated with it, and for those seeking funding. The level of resources (volunteer or paid) and amount of time available before the first investments are expected or required will have a significant bearing on how funds can be made available. Some methods involve more time and resources to set up and run effectively than others (for example participatory grant-making involves considerable promotion and the organisation of a voting event and its value needs to be weighed against this). In addition, it is unfair, unreasonable and indeed waste of people's time to expect lots of applicants to put in the effort in applying for or requesting funding where they may not have any realistic chance of success.

Increasing participation in local decision making: Another issue to consider is how inclusive to make the funding distribution processes; methods like participatory budgeting (see below) can bring about a range of additional outcomes such as greater involvement in and support for the Fund, a sense of community empowerment, and further involvement in or resources for the groups that take part. However, remember that more inclusive approaches will often involve more work to set up and run. Moreover, it isn't always the case that the most deserving causes will be prioritised through these. Popular causes aren't necessarily those that address disadvantage or inequality, for example.

Weighing up the above factors will be an important exercise in choosing distribution methods for the Fund.

b) Some options for fund distribution methods

Open grant making programmes: Many community benefit funds of any size will lend themselves to an open grant making programme in some form, and this is often a good place to start; it is a way of getting funding out relatively quickly, there is established practice to draw on, and many local groups will have experience of applying to an open grants programmes previously. It can also provide an opportunity for the decision making group to get a solid grounding in some key aspects of fund governance and administration - and which can then inform the use of other distribution methods at a later stage.

Under this method, those who are eligible to apply for funding must follow an application process and a decision on their proposal is then made by a local group or forum (see the module *Getting the Governance Right* for more information on setting up such a group). Grant awards may be single or multi-year in nature.

A grant making programme can be fairly targeted or open; seeking to address specific fund purposes (for example provision of community facilities or spaces only) or a wide range of these. Some funds may feature a number of fairly targeted funding strands, others just one open grant programme. More information on running an open grant programme is provided in the annex *Guide to open grant making.*

Commissioning: Where there is clear evidence that specific project or service is required locally, for example through the community action plan, this can be commissioned directly. For example, local broadband provision or community transport. This will involve putting together a specification for the service with clear outcomes and related targets to be met, and then inviting proposals in response to this. A clear selection process and criteria will need to be agreed. There will need to be a body that commissions the service, in other words a legal entity that enters into a binding agreement with the selected service provider.

Ongoing payments can be tied to the achievement of the outcomes and targets. Regular reporting and reviews are therefore key; there must be a way to check that the agreed activity is being delivered well, achieving impact, and that it is still a priority locally if the aim is for the commission to run over a number of years.

Targeted (or direct) funding: again used where a specific service or project is required by the community (and there is evidence of that), but where there is clearly just one local organisation well placed to deliver it. In this case, a bid for funding may be encouraged from that organisation directly. Identification of the bidding organisation may have come about in various ways, for example the organisation may have made representations to the renewable energy business or those involved in making funding decisions, or local stakeholders may have approached the organisation to ask if they would be willing to provide the service or project in question. Whatever the case, there should ideally be some consensus, at least amongst key local stakeholders, that the service or project is required and that the organisation in question is best placed to provide it.

Similar in some ways to commissioning, the bidding organisation should be required to outline how they will deliver the service or project, at what cost, and over what timescale. This bid should be in response to a clear specification, which may be jointly developed by the decision making body and the bidding organisation and must have clear and realistic (but challenging enough) targets and outcomes. However, unlike commissioning, this kind of targeted (or direct) funding is not an openly tendered process – it is closed to just that organisation.

The award could be multi-year in nature but funding should not be expected to continue automatically, year-on-year; it should be dependent on reviews of the extent to which the agreed targets and outcomes have been achieved, perhaps annually.

Bursaries for individuals: A targeted grant scheme aimed at addressing specific purposes by funding individuals who meet certain criteria. Some examples include funding for volunteer development, education or training opportunities. Bursaries are usually capped at a reasonable limit, and proof of need may be requested, such as evidence of receipt of welfare benefits, as well as of the opportunity, for example acceptance on to a college course or apprenticeship.

Participatory grant-making: This is a form of competitive grant-making that involves a larger number of local people having a direct say on which proposals receive funds through a voting process (either on-line or at a public event). Proposals must however still meet with the Fund's purposes and with basic eligibility criteria, so will need to be screened beforehand.

For example the Cardenden Community Panel has run participatory grant-making processes to distribute community benefit funds from Ventient Energy's Westfield Wind Farm, and *Up North!* (Melness and Tongue) have also used this method for distributing Scottish Government funding and are looking to use it to distribute community benefit funds coming into that area. Participatory grant-making has its roots in participatory budgeting (PB) which has gained increasing attention from central government and local authorities over the last few years. See Further Resources Section below for more guidance on PB.

Repayable grants: This type of investment may be appropriate where the projects or enterprises being considered for funding support will generate income from trading (i.e. selling goods or services). If they will, at what point might they expect to break even and move into profit? Offering a repayable grant (essentially an interest-free loan) can be one way of getting more value from the Fund, recycling the grant monies for further onward distribution. This method may be most appropriate where funding a local business is being considered and may make such an investment more palatable to the wider community. Cash flow forecast information that supports this decision, and a clear agreement setting out re-payment terms and conditions, will be required. The investment must remain interest free; charging interest on it may not be allowed by the renewable energy business and such lending is regulated by the Financial Conduct Authority.

3. Adjusting the fund strategy

In any community, local needs, aspirations and opportunities are constantly changing. And, as the community benefit income is disbursed and funded projects delivered, the community's experience, skills and ambitions will also evolve. The community benefit fund and the strategy that guides its delivery need to be responsive to these changes if the Fund is to deliver the greatest possible impact and help achieve the community's vision.

It is important therefore that provision is made for the Fund Strategy to be reviewed at regular intervals and updated as necessary. For funds with a lot of disbursement activity, or during periods of rapid change in the local area, reviews may be appropriate every two or three years. For others, less frequently.

Related, it may be a good idea to refresh the community action plan at similar intervals and prior to reviewing the Fund Strategy. Indeed, if there are significant changes in the locality, for example in demographics or employment opportunities, it will almost certainly be appropriate to revisit the action plan. This may result in changes to the themes/outcome and priorities in the plan, which should then feed into the refreshed Fund strategy.

The review process can provide an opportunity to:

- Evaluate the impact achieved through the Fund to-date against the stated purposes and priorities of the Fund
- Respond to specific issues such as underspending in general or against specific purposes or priorities or, where there is high demand, how to ensure only the most impactful proposals are supported. It may be that further, targeted promotion of the Fund is required or a service can be commissioned to help increase the capacity of certain groups to plan and deliver their projects well
- Explore the rate of and reasons behind the rejection or withdrawal of funding proposals and ask whether there is any pattern here that needs responded too.
- If there are several communities involved in the Fund, assess the spread of funding distributed between these and whether any remedial action is warranted in an attempt to ensure a fair spread

- Take into account other income that might have become available and/or other strategic developments in the community or wider area likely to impact on the Fund.

The Fund Strategy and distribution arrangements may need to be adjusted in response to issues such as **spending too little** (overall, or in relation to specific Fund purposes/priorities only) or **high demand** for funds (where this is beyond the amount available). Some options for either scenario are set out below.

Fund underspend:

1. Increasing the maximum grant size, where there is evidence that this is limiting recipient's ability to deliver the most they can (for example, where a lot of funding proposals have been at the current award maximum)
2. Supporting greater local capacity by:
   - Directly funding or commissioning a programme of training and support for local groups, e.g. in governance, community engagement, project development/management, or fundraising.
   - Directly funding or commissioning a community development worker post that can support local groups, develop projects, etc.
   - Introducing a new strand to the Fund that comprises small, easy to access grants for groups to be used specifically for capacity building and project development activity.
3. Increased/ wider Fund promotion (if not already sufficient).
4. Exploring the potential for placing some funds into an endowment so they can begin to, ideally, generate further capital for disbursement in future.
5. Widening the area of benefit or allocating a minimum or maximum percentage to a wider area, even temporarily, to allow funding of activity that benefits neighbouring communities. Whilst this runs the risk of undermining historic arrangements and/or creating dissent locally, if the area of benefit is such that it limits effective fund spend then there may well be logic in opening this discussion up.

High demand on the fund:

1. Develop Fund purposes and/or priorities, if these are not already in place.
2. Ring-fence a percentage of funds to projects that meet specific Fund purposes/priorities that have not been sufficiently well funded to date (and where there is a clearly further need) or state that only projects meeting those outcomes will be funded for a specified period or until further notice.
3. Reduce the maximum grant size, encouraging applicants to reduce project costs by improving efficiency, seeking funds elsewhere, or reducing the scale of their projects.
4. Close the Fund for a period, encouraging prospective applicants to seek funding elsewhere.
5. Specify new or tighten existing horizontal criteria, for example stating that only proposals with a robust plan for sustainability beyond the grant period, or those that can evidence a stated minimum level of matched funding, will be considered.

6. Close the Fund to certain types of project or applicant, for example where the impact from these is unproven or where a significant number have previously received funding.

Where any of the above changes are introduced, they must be adequately communicated to ensure the Fund continues to be operated in a fair and transparent way.

Further resources

The Scottish Government's Community and Renewable Energy Scheme supports communities across Scotland on various aspects of community benefit funding:
www.localenergy.scot

Development Trust Association Scotland is the community-led regeneration network and trade association for community development trusts:
www.dtascot.org.uk

Foundation Scotland works with renewable energy businesses and communities to facilitate arrangements for establishing and implementing community benefit funds. Foundation Scotland also directly administers community funds in partnership with communities:
www.foundationscotland.org.uk

Joseph Rowntree Foundation and Alan Caldwell Associates, Re:Sourcebook, Planning for your Community, provides information on community action planning: www.jrf.org.uk/publications/resourcebook-planning-your-community

Scottish Government Investment in Rural Development: A Community Capitals Approach, gives more information on using a community capitals approach: www.scotland.gov.uk/Publications/2012/03/8336/0

Meeting the Charity Test sets out what is and isn't considered charitable activity in Scotland: https://www.oscr.org.uk/becoming-a-charity/meeting-the-charity-test

PB Scotland: an online hub for the latest news, events and ideas on participatory budgeting in Scotland, at: https://pbscotland.scot/

The National Audit office provides a Successful Commissioning Toolkit for public sector organisation, however much of the guidance and principles hold true for any sector looking to commission services: https://www.nao.org.uk/successful-commissioning/

The CARES community benefit toolkit annex *Guide to open grant making* provides more information and guidance on disbursement funding through grant making.

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