

# The Phoenix Fellowship Grant-Making Policy

Version 1.2

## Purpose of this Policy

This policy outlines the framework by which The Phoenix Fellowship awards grants. It ensures that the grant-making process is transparent, fair, legally compliant, and aligned with the charity's mission to support refugee students in science and medicine across UK universities.

## Alignment with Charitable Objects

All grants awarded must directly further the charity's objects, as set out in the governing document, including the advancement of education, the relief of financial hardship, and the promotion of community and leadership potential among individuals from refugee backgrounds.

## Types of Grants

Fellowship awards to refugee students entering or currently enrolled in UK universities. In special circumstances, emergency hardship grants for eligible fellows facing unexpected barriers may be approved. Similarly, microgrants to support community, peer, or leadership initiatives led by Fellows may be awarded at the discretion of the Trustees of The Phoenix Fellowship.

## Eligibility Criteria

Eligibility for grant support is determined by published criteria for each funding round and will include refugee status under UK law, academic potential, community-mindedness, and financial need.

## Application and Review Process

- Application forms will be published online with a clear deadline.
- Applications will be screened for completeness and eligibility.
- A Grant Review Panel, including trustees and independent reviewers, will assess applications, as well as specialist reviewers from Refugee Education UK (<https://reuk.org>)
- Applicants may be invited to interview or submit additional information.
- Recommendations will be approved by the Board and successful applicants notified in writing.

## Due Diligence and Safeguards

- Verify identity and refugee status.
- Check enrolment or conditional offers from UK universities.
- Assess risks of fraud, coercion, or undue influence.

## Payment and Monitoring

- Grant payments will be made by bank transfer with secure recipient verification. All payments will be made to REUK to manage per agreed MOUs signed between TPF and REUK.
- All grantees must agree to terms and conditions including permitted use and reporting obligations.
- The Phoenix Fellowship will monitor use of funds and may request updates, receipts or interviews.

### Conflicts of Interest

No individual with a financial or personal interest in a grant application may participate in the review or approval process. All Trustees and staff must declare potential conflicts and recuse themselves from related decisions.

### Confidentiality and Data Protection

All personal data received during the application process will be stored securely and processed in accordance with the charity's Data Protection Policy and UK GDPR obligations.

### Complaints and Appeals

Unsuccessful applicants may request feedback and may appeal if they believe there has been a procedural error. Appeals will be reviewed independently and must be submitted within 14 days of notification.

### Trustee Implementation Guide

#### 1. Trustee Responsibilities

Trustees are responsible for:

- Ensuring all grants align with the charity's objects and public benefit.
- Overseeing fair and impartial assessment processes.
- Ensuring sufficient due diligence before approving any grant.
- Reviewing anonymised data on grant distribution for fairness and impact.

#### 2. Key Oversight Tasks

Trustees should ensure that:

- A Grant Review Panel is convened with diverse and independent input.
- Clear documentation supports all grant decisions.
- Any appeals are reviewed according to policy, with appropriate independence.

#### 3. Annual Governance Checklist

Trustees are advised to include the following grant-related actions in their annual calendar:

- Q1: Approve criteria and timeline for upcoming grant cycle.
- Q2: Receive report on previous cycle (including outcomes and demographics).
- Q3: Monitor ongoing disbursements and any reported risks.
- Q4: Review and approve policy updates.

### Contact

If you have any questions about this policy, please contact the Policy Lead using the [policy@phoenixfellow.org](mailto:policy@phoenixfellow.org) email address.

### Review

This policy is reviewed at least once a year and sooner if legal requirements or our operations change. The version number and effective date will be updated on publication.

### Effective date

Effective from. 1<sup>st</sup> October 2025

Document owner. Policy Lead.

Next planned review. September 2026