

Distribution Preferences Policy

Donors of funds to the Access to Justice Foundation (the Foundation) may make distribution preferences that the Foundation make grants using those funds to a particular charity or charities.

This applies to any donation (including unclaimed client account donations, events fundraising and pro bono costs). Preferences as to distributions will be considered by the Board of the Foundation but the Board retains its discretion as to whether to make the distributions.

Each donation must be made with a distribution preference in writing except as described under event fundraising below. Where it is known to the Foundation that an advice or pro bono agency was instrumental in obtaining a pro bono costs order, a distribution preference in favour of that agency shall be assumed.

In relation to any amounts, the Board retains its discretion as to whether to permit the distribution preference and in what amount.

Amounts to be distributed up to and including £5,000

The Chief Executive may grant up to and including £5,000 to the beneficiary of the distribution without consulting the Board.

Amounts over £5,000

Distribution preferences for payments of amounts over £5,000 are considered by the Board of Trustees.

Event fundraising

Where the Foundation organises fundraising events (such as legal walks) and a registered charity carrying out work that meets the Foundation's objectives participates, all funds raised by that charity's fundraising team shall be paid to that charity without the need for:

- a distribution preference request in writing
- Board approval
- an application
- a grant agreement or
- reporting.

Designated funds (events and other)

Any funds raised through events in a particular region or in Wales, Northern Ireland or Scotland shall be designated by the Board for expenditure in that place. Any other funds (for example, unclaimed client account funds) specified (but not restricted) for expenditure in a particular region, Wales, Northern Ireland or Scotland shall be treated by the Board as designated for expenditure in that place.

The Foundation may retain an appropriate proportion of funds raised to contribute to its operating costs.

Information required

Distribution preferences shall only be paid in the following circumstances:

- To registered charities.
- All amounts distributed in connection with pro bono costs and any other distributions over

£1,000 (except in respect of event fundraising) shall require a grant agreement and appropriate reporting. For amounts between £1,000 and £3,000 it is likely that a copy of the organisation's annual report would be adequate by way of reporting.

- For activities that fall within the Foundation's objectives.
- In relation to pro bono costs, for activities that fall within s194 Legal Services Act 2007.
- Where a charity would receive more than £5,000 in any 12-month rolling period they will be required to submit a statement setting out details of how the money would be spent and a budget.

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