

Helping disadvantaged people play a fuller role in the community of their choice



Emma Tregear, Grant Manager, South East and London

Overview

- Who we are
- Our focus
- Our approach
- Our 2008 funding programmes
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- Our resources



Who we are

- One of the UK's leading grant makers
- We fund local, regional and national charities working to tackle disadvantage across England & Wales
- A registered charity & independently run
- We receive 1% of Lloyds TSB Group's pre-tax profits averaged over 3 years
- 2011 income – £25m

Our focus – on change

- We support charities that help **disadvantaged people** who live in England or Wales to **play a fuller role** in the **community of their choice**
- We focus on the **changes and benefits** that charities' work will produce directly or indirectly for their users/beneficiaries



Our focus – your organisation

- We support **small and medium community based** charities that help disadvantaged people to play a fuller role in the community of their choice:
 - local and regional charities with income up to £1m
 - national charities with income up to £5m
- We focus our support on charities that are:
 - underfunded
 - established charities

Our focus – your work

- We fund charities' core work through:
 - core costs, including salaries
 - funding for projects that build on charities' core purpose
- We provide second stage funding to help charities to develop



Our focus – who don't we fund

- Organisations that are **not** registered charities
- Charities that mainly work overseas
- Charities that mainly give funds to other charities, individuals or other organisations
- Hospitals, hospices or medical centres
- Rescue services
- Schools, colleges and universities

Our focus – what don't we fund

- Activities which a statutory body is responsible for
- Capital projects, appeals, refurbishments
- Environmental work, expeditions/overseas travel, holidays or trips.
- Funding to promote religion
- Loans or business finance, sponsorship or funding towards a marketing appeal or fundraising activities
- Medical research, funding for medical equipment or health treatments
- Work with animals or to promote animal welfare

Our focus – your needs

- We have a local presence and respond directly to local, regional and national needs
- We speak to all potential applicants to discuss their work before submitting to ensure best use of time
- We visit every applicant for a grant over £5,000
- We aim to listen to and hear what will make the difference



Our approach

- We aim to be:
 - accessible to all
 - approachable & supportive
 - responsive & customer focused
 - straightforward
 - timely & transparent



Our funding programmes

1. Community Programme

- responsive, needs driven
- open to charities working within our mission that meet our criteria
- we focus on the changes and benefits you can produce directly or indirectly for your beneficiaries, in particular:
 - Improved social and community involvement
 - Improved life choices and chances
 - Helping people to be heard



Our funding programmes

2. New issue-based programmes

Please check our website at:
www.lloydstsbfoundations.org.uk



Next steps – how to apply

1. Check if there is a suitable programme that is relevant to your work:
www.lloydstsbfoundations.org.uk
2. Complete our on-line charity eligibility questionnaire or call us to complete the questionnaire:
0870 411 1223
3. – **If your charity is eligible**, we will call to discuss **if your work is eligible** and your potential application
(Please note charity eligibility does not mean funding is guaranteed)

The application process

- For applications for £5,000 or more we will visit you to discuss your potential application
- If you are applying for a grant of less than £5,000 we will carry out a telephone assessment
- Charities must be able to **describe the changes and benefits** that their work will produce for their beneficiaries as well as the **evidence** they will use
- Once you have submitted the application form you will receive a decision within 3 to 6 months – we will advise you of the likely date on submission

Common reasons for unsuccessful applications

- Charities or their work not falling within our funding criteria:
 - Please see our guidelines for more details of what we do and don't fund
- Asking for more money than appropriate for the size of charity
- Charities not filling in the application form properly



Learning from our grant making

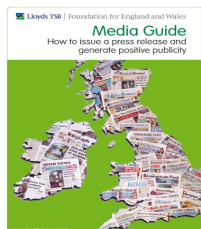
- We use the learning from our grant making to feed into the our programme development
- We have a monitoring policy and use a simple grant report form
- We have an evaluation policy including pre- and post-grant visits
- Full details will be provided at grant approval



Our resources: Media Guide – helping you raise your 'voice'

- Available on our website – see 'Press Centre'

www.lloydstsbfoundations.org.uk



Contact details

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General Enquiries: 0870 411 1223

Website: www.lloydstsbfoundations.org.uk

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