

A background image showing a group of children sitting on the floor in a library, reading books. A woman is standing behind them, assisting them. The scene is bright and cheerful, with bookshelves visible in the background.

# COMMUNITY PROJECTS GRANT PROGRAMME GUIDANCE - 2021

**McCARTHY STONE**  
**FOUNDATION**



# **WELCOME, AND THANK YOU FOR TAKING AN INTEREST IN WORKING WITH OUR FOUNDATION**

- 1. INTRODUCTION**
- 2. ABOUT OUR FOUNDATION**
- 3. HOW WE ARE GOVERNED**
- 4. WHAT WE SUPPORT**
- 5. OUR WORK, YOUR IMPACT**
- 6. CASE STUDY – ACCESS DORSET**
- 7. APPLICATION PROCESS**
- 8. COMPLETING AN EXPRESSION OF INTEREST**
- 9. FAQs**



# INTRODUCTION

Charities spend over £1.1 Billion a year applying for funding, of which 63% of applications are unsuccessful. We do not want your application to become one of those statistics, so before completing our online form, we encourage you to read through this guidance outlining the projects we are looking to support.

As a relatively small foundation, we are keen to work closely with local community led organisations to provide a range of support. Through partnership with our parent company, McCarthy Stone, and other supplier partners, we are able to access funds, resources, volunteers, and materials at little or no cost.

The scale of the projects we look to take on is less important than the difference they will make to the community, so when reviewing applications we are looking to see evidence that your application makes a real impact on the lives of local people.

In particular, our primary focus is on projects that combine our three key charitable aims. A strong application will be one that can demonstrate it will improve the health and wellbeing of older people, help young people through intergenerational activity, and contribute to regenerating the local community in which it is based. To help bring this to life we have included a case study of a recent project.

Before you move to making an online expression of interest, please be confident that you can evidence the above. You can do this a range of ways, using case studies, user feedback, annual reports, online or offline media, and any other supporting evidence you have. We know that your time is valuable, so we continue to develop our application process to be as quick and straightforward as possible.

Lastly, we want to help you, so if you feel that your project is a great candidate for support, but would like some help or require additional support with the process, please get in touch.

I look forward to reading your application soon,

Graeme Marsh, Foundation Manager



***“PEOPLE NEED PEOPLE, AND PEOPLE NEED PURPOSE FOR COMMUNITIES TO THRIVE, AND WHILE OUR HOMEOWNERS LEAD HAPPY AND FULFILLING LIVES, WE KNOW MANY IN THE WIDER POPULATION ALSO FACE CHALLENGES INCLUDING ISOLATION, ILL HEALTH, AND HARDSHIP”***

**JOHN TONKISS**

**CEO MCCARTHY STONE AND CHAIR OF TRUSTEES – MCCARTHY STONE FOUNDATION.**

## **OUR FOUNDATION - WHY US AND WHY NOW?**

- We are uniquely positioned to support the communities around the country to recover from the devastating impact of Covid-19. We have skills, resources, passion, and a shared interest in helping those suffering from isolation, hardship, and ill health.
- The Foundation’s work will provide support for those who need it most, including older people facing isolation, loneliness, or poor health; young people who may be falling behind personally and academically; and communities in need of regeneration.
- A strong commitment to a social purpose, sustainability, and the wider communities we live and work in is key to our continued efforts to ensure everyone can enjoy a life that is fulfilling, independent, and connected to the communities they are part of.

We are committed to make that vision a reality...



# How are we Governed?

We aspire to deliver our mission with the highest standards of governance, compliance, and values possible. The McCarthy Stone Foundation is an independent registered Charitable Incorporated Organisation (CIO) in England and Wales reg no. 1191504. It is governed by a board of volunteer trustees, from McCarthy Stone and ‘independent’ members from outside the organisation. There is an Operating Committee, responsible for delivering on the charitable purposes, and daily operations are led by our full-time Foundation Manager.

## BOARD OF TRUSTEES

The Foundation is led by a board of volunteer trustees, who oversee the governance of the charity, determine strategy, ensure compliance, and decide on grant awards and partnerships.

## OPERATING COMMITTEE

The Operating Committee support the delivery of the Foundation objectives and is composed of a group of key stakeholders from within McCarthy Stone. They support the Foundation Manager with engagement and activities across the company.

## FOUNDATION MANAGER

The Foundation Manager is responsible for daily operations and management of the Foundation and is a full-time staff member whose costs are covered by McCarthy Stone.



**John Tonkiss**  
Chair



**Paula Jordan**  
Trustee



**Martin Edwards**  
Trustee



**Paul Teverson**  
Trustee



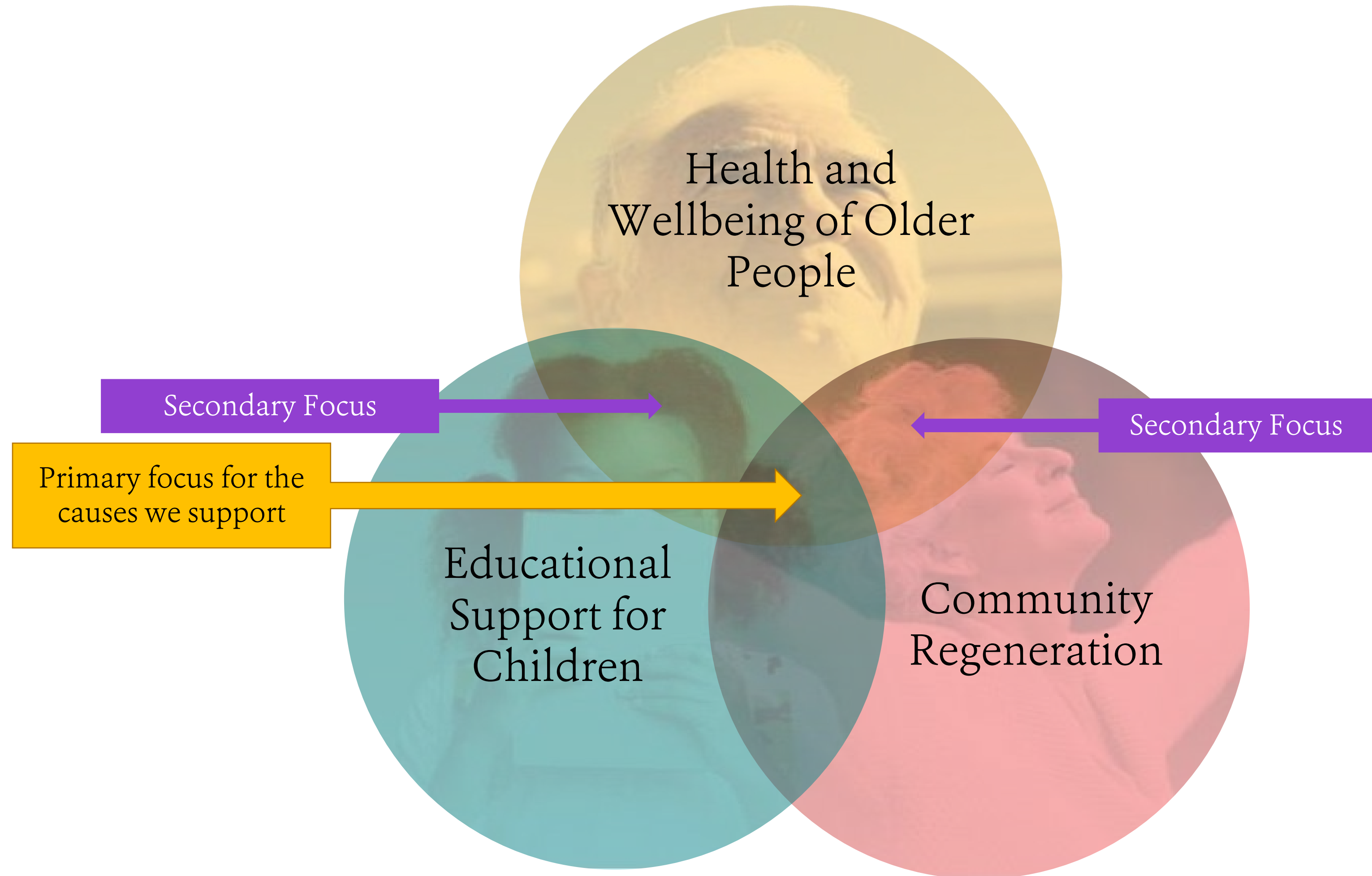
**Graeme Marsh**  
Foundation  
Manager

# WHAT WE SUPPORT

- Our primary focus is on projects where our three circles of purpose intersect.
- Our secondary focus is on projects where two circles meet.
- We accept applications from Charities, CICs, Community Groups or Social Enterprises.
- Your work must be legally charitable, and we will only award unrestricted funds to registered charities.
- You must have a governing document and a registered bank account for the organisation.
- Grants are generally for amounts up to £5000.

# WHAT WE DO NOT SUPPORT

- Contributions to general appeals or circulars.
- Religious activity which is not for wider public benefit.
- Public bodies to carry out their statutory obligations.
- Activities which solely support animal welfare.
- Activities which have already taken place.
- Grant-making by other organisations.
- Privately owned and profit-distributing companies or limited partnerships.





# OUR WORK, YOUR IMPACT

The range of ways we can support community projects is diverse.

Aside from direct funding, we are keen to offer additional help where it might be helpful to the success of the project.

Through our network of partners, we are able to bring together volunteers, ranging from construction artisans through to volunteers with a wide range of experience and expertise.

Where your project has opportunities for this, and where it is wanted, we will work with you to identify other ways in which we might be able to contribute.

Grant  
Funding



Volunteer  
Support



Project  
Support



Expertise



Local  
Community  
Knowledge





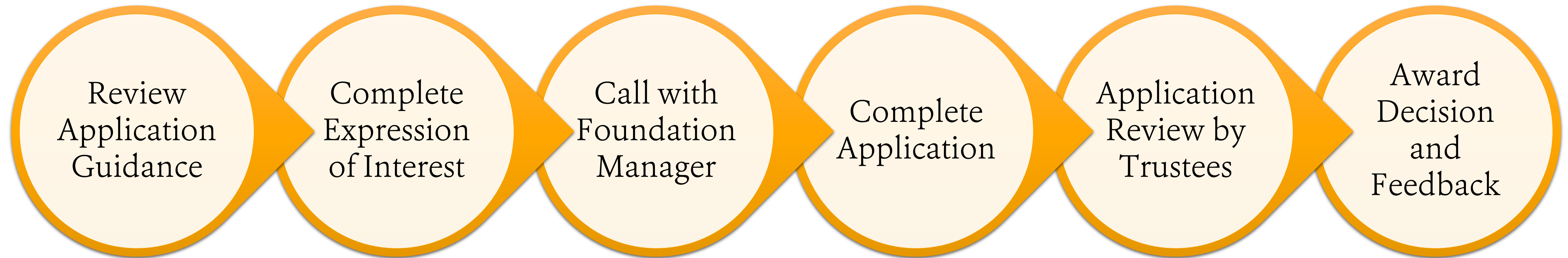


## CASE STUDY – ACCESS DORSET – GRANT AND BUILDING WORKS

- Access Dorset initially received a £250 grant from the McCarthy Stone Foundation.
- They work with a diverse range of isolated people, including older adults and young people with learning disabilities.
- Through working together, we identified a project that meets our primary focus for support; to lay a new concrete base for the Access Dorset polytunnel.
- This work will support the charity's 'Build, grow, cook' project, providing activities for the service users, and producing food for the on-site café.
- Working with our supplier partners at Woodmace, who are specialists in groundwork, we will be completing the work for the charity in June 2021. This will result in significant savings for the charity, and enable the project to be completed much faster.
- The work will help regenerate community land, supporting the charity to continue engaging with older adults, often isolated, and younger people with learning difficulties.



# COMMUNITY GRANTS – APPLICATION PROCESS



- Trustees review applications quarterly. Cut-off dates for each round of applications will be publicised on the Foundation website and social media pages. Applications will next be reviewed on September 21<sup>st</sup> 2021.
- A copy of our Grant Making Policy will be sent to you with the link to the main application form.
- Expressions of interest can be sent in at any time and are reviewed on a rolling basis (usually within two weeks of submission).
- Grant applications are scored across four areas:
  - Focus – how well does the project align with our Foundation focus?
  - Impact – What will our funding change and who for?
  - Risk – Will the programme deliver the outcomes? Can the organisation deliver the programme? Can risks be controlled?
  - Organisation – Is the organisation well governed and well aligned with our own values?



# EXPRESSION OF INTEREST: WHAT TO INCLUDE



What will change as a result of the funding and who for?



How does your work align with our primary grants focus?



What are your programme/organisation outcomes and how will you know if you have achieved them?



Where is your project located?



What is your charitable status?



Send your EOI via email to [graeme.marsh@mccarthyandstone-foundation.org.uk](mailto:graeme.marsh@mccarthyandstone-foundation.org.uk)



# FAQS

**Q. Do you fund for core costs?**

A. Yes, with the exception of CICs, we are happy to support the core costs of programme delivery or operating costs. Funding for CIC's is restricted to use for start ups or expansion.

**Q. Can we apply if we have received funding from you before?**

A. Yes, providing the conditions of the previous grant were satisfied and all reporting is complete.

**Q. When will we get a decision?**

A. As soon as possible, once funding allocation has been completed. This is usually within 1 week of the Trustees reviewing applications.

**Q. Is funding unrestricted?**

A. Where possible we always look to award funds unrestricted.

**Q. What is the success rate of applications?**

A. Our most recent funding round had a 50% award rate. We aim to improve on this with each round of funding, though it is dependent on available resources.

**Q. Do you give feedback on decisions?**

A. Yes, we will always tell you why we did or didn't award you funds.

**Q. What is the maximum amount you will award?**

A. There is no upper limit, but due to the size of our funding resource, we typically look at grants up to £5000

**Q. Is there a limit on the size of charity that can apply?**

A. No, but we will look at your financial reserves and factor this into scoring on impact.

**Q. We don't fit all three circles, can we still apply?**

A. Yes, providing your proposal addresses the health and wellbeing of older people AND either a community regeneration or educating young people element. We score this under 'Focus'. Programmes only addressing one element of our charitable aims are unlikely to be funded.

**Q. We are not experienced at grant applications, and would like to ask a few questions, can we have a call first?**

A. Yes, our Foundation Manager is happy to help with a short call (please ensure you have reviewed this guidance and our grants policy/website first), or to assist you with an application if you have additional needs or are unable to complete an online form.



# McCARTHY STONE FOUNDATION

