McCARTHY STONE
FOUNDATION

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

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INTRODUCTION

As a relatively small foundation, we are keen to work closely with local community led organisations to provide a range of support. 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.

Our funding is aimed at grassroots organisations, which means we are unlikely to fund programmes without a defined local focus and impact and a demonstrable impact on the older people within that area. **We currently do not fund organisations with an annual income over £500,000 or with more than 12 months of income available in reserves** (we may ask to see your reserves policy if you have over 3 months of income in reserve so we can understand your approach better).

In particular, our primary focus is on projects that support the health and wellbeing of older people, through intergenerational activities and/or community regeneration. A strong application will be able to demonstrate outcomes across all three areas, but this is not always required. To help bring this to life we have included some case studies of recent grantees.

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

About our Foundation

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.

The Foundation delivers on its charitable purposes through grant making, project support and employer supported volunteering. Grants range from £250 to £6250 and are focused on supporting grassroots charitable causes supporting the health and wellbeing of older people in communities across the country. The foundation particularly supports causes that achieve this through intergenerational activity and the regeneration of community spaces.

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. In 2022/23 we will be increasing the board to 6 trustees to strengthen our commitment to EDI and ensure the continued independence of the charity.

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.

McCARTHY STONE
FOUNDATION

John Tonkiss
Chair

Paula Jordan
Trustee

Paul Teverson
Trustee

Martin Edwards
Trustee

Sarah Allport
Trustee

Graeme Marsh
Foundation
Manager

www.mccarthystonefoundation.org

HOW OUR FOUNDATION HELPS

Bringing Generations Together

Intergenerational connection supports both old and young, helping young people to understand ageing better while supporting the wellbeing of older people.

Regenerating Community Spaces

From village halls to community allotments, we support local resources that provide a hub for people to come together, reducing isolation and loneliness.

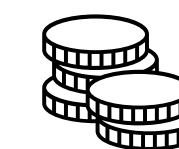Supporting the Health and Wellbeing of Older People

Supporting Grassroots Organisations

We work proactively to support grassroots causes that have local impact, are volunteer driven and often find accessing funding a challenge due to resources and expertise.

Since launching in December 2020

123 Community Grants Awarded

£204, 669 in funds disbursed

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CASE STUDIES

Alive Activities

- Applied for funding for an intergenerational project at their dementia friendly allotment.

- Received £5000 towards project costs, funding the cost of a trained therapeutic horticulture facilitator, session resources, and adaptive equipment.

- Key outcome was to develop intergenerational relationships that support the health and wellbeing of older people living with dementia over a 12 month programme. Over 12 months our funding enabled the charity to engage 125 older people and 65 children.

Minehead Shed

- Applied for funding to regenerate a community space and create a 'Shed', supporting older people to find connection and purpose, while also offering intergenerational opportunities.

- Received £6250 towards capital project costs, plus a large donation of paint from our partners at Azko Nobel.

- Key outcome was to enable the charity to complete the building work and open the shed fully for community use. Our support also unlocked a further £10,000 of pledged funding from another charitable trust.
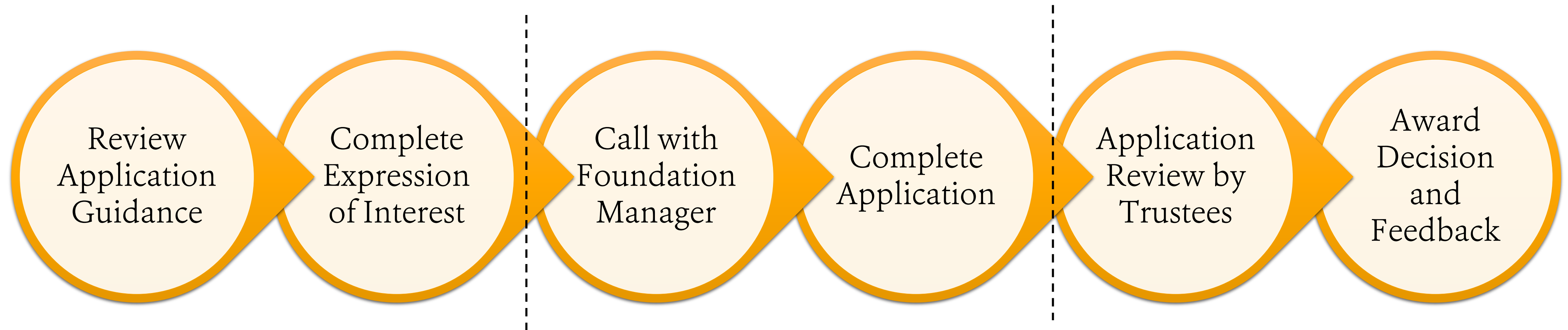
Mamhead Village Hall

- Mamhead Hall had issues with damp and cold, meaning the hall was not fit for use during winter months.

- The proposal was for new double glazing or solar panels to improve efficiency, reduce heating costs, and render the hall suitable for year round use. Costs circa £20k.

- McCarthy Stone Foundation awarded £5000 of funding to meet the total cost of replacing the old windows with new UPVC double glazing.

- We accept applications from Charities, CICs, Community Groups, Schools/Colleges or Social Enterprises working in local communities.
- Your work must be legally charitable, and we will only award unrestricted funds to registered charities. We do not fund:
  - 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.
- You must have a governing document and a registered bank account for the organisation.
- Your income must be below £500,000 p.a.
- You must not have more than 12 months of operating costs in reserves.
- Grants are generally for amounts up to £5000

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

McCARTHY STONE

WHAT WE SUPPORT, AND WHAT WE DON'T.

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COMMUNITY GRANTS – APPLICATION PROCESS

Review Application Guidance → Complete Expression of Interest → Call with Foundation Manager → Complete Application → Application Review by Trustees → Award Decision and Feedback

- 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 October 5th 2022.

- A copy of our Grant Making Policy can be downloaded or viewed on our website.

- Expressions of interest will open on July 11th and close on August 5th. 2nd Stage applications will open on August 21st and close on September 9th.

- If your EOI is successful, we invite you to have a call with our Foundation Manager (optional) ahead of submitting your application in full.

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HOW WE SCORE APPLICATIONS: SCORING RUBRIC

Criteria	Excellent (4)	Good (3)	Fair (2)	Poor (1)
Focus 30%	• Strong alignment with our charitable aims and primary grant focus. • Clear evidence of a need within their community. • **A strong match for our work**	• Good alignment with our charitable aims and secondary grant focus. • Some evidence of a need within their community. • **A good match for our work**	• Some alignment with our charitable aims but not our primary or secondary grant focus. • Limited evidence of a need within their community. • **Some aspects match with our work**	• No clear alignment with any of our charitable aims. • There is no evidence of a need within their community. • **No real match with our work**
Impact 30%	• If delivered to plan, the project will deliver the outcomes intended. • Budgets are reasonable, proportionate and excellent value for money • Monitoring and evaluation is clear and appropriate • **Funding will make a *clear impact* on the project or organisation and community**	• If delivered to plan, the project should deliver the outcomes intended. • Budgets are reasonable, proportionate and good value for money • Monitoring and evaluation is present, but limited. • **Funding will make *some impact* on the project or organisation and community**	• If delivered to plan, the project may deliver the outcomes intended. • Budgets are mainly reasonable and proportionate but limited value for money • Monitoring and evaluation is incomplete or inappropriate • **Funding will make *limited impact* on the project or organisation and community**	• If delivered to plan, the project is unlikely to deliver the outcomes intended. • Budgets are unclear, unreasonable, or poor value for money • No monitoring or evaluation is evident. • **Funding will make a *little or no impact* on the project or organisation and community**
Risk 20%	• Clear experience and/or expertise to deliver the project • Any delivery risks are clearly mitigated • Well governed and managed and is contributing to the costs of the project or service. • **The project *will* be delivered to plan and therefore *will* deliver the outcomes it intends.**	• Some experience and/or expertise to deliver the project • Delivery risks can be mitigated • Well governed and managed is contributing to the costs of the project or service • **The project *should* be delivered to plan and therefore *should* deliver the outcomes it intends.**	• Limited experience and/or expertise to deliver the project • Delivery risks are not mitigated • Governance and management is acceptable and there is no contribution to the costs of the project or service • **The project *may* be delivered to plan and therefore *may* deliver the outcomes it intends.**	• No experience and/or expertise to deliver the project • Delivery risks are not possible to mitigate • The level of governance and management is questionable and there is no contribution to the costs of the project or service. • **The project is *unlikely* to be delivered to plan and therefore *unlikely* to deliver the outcomes it intends.**
Organisation 20%	• Highly community focused and volunteer driven • Reserves levels are not excessive and a clear policy is in place to manage this. • Services are inclusive and accessible • Positive reputational benefits • **The organisation has a *strong* alignment with the values and purpose of our Foundation.**	• Mostly community focused and volunteer driven • Reserves levels are acceptable and a clear policy is in place to manage this • Services are inclusive and accessible • Good reputational benefits • **The organisation has a *good* alignment with the values and purpose of our Foundation.**	• Partially community focused and volunteer driven • Reserves levels are high, but a clear policy is in place to manage this • Most services are inclusive and accessible • Neutral reputation benefits • **The organisation has *limited* alignment with the values and purpose of our Foundation.**	• Not community focused or volunteer driven • Reserves levels are excessive and no clear policy is in place to manage this • Services are not inclusive an/or accessible • Possible negative reputation concerns • **The organisation has *no* alignment with the values and purpose of our Foundation.**

EXPRESSION OF INTEREST: SUBMIT ONLINE AT: HTTPS://FORMS.OFFICE.COM/R/VZ8SI9CV6U

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?

How much are you requesting and where is your project located?

What is your charitable status?

Remember to complete all your contact details, including a contact number and email address.

Send any supporting documents to graeme.marsh@mccarthyandstone-foundation.org.uk

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FAQS

Q. Do you fund for core costs?
A.   Yes, with some exceptions, 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. If your charity runs a wide range of programmes we may restrict funding to our particular area of focus.

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 try to 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. Yes, we will also look at your financial reserves and factor this into scoring on impact, so a robust and clear reserves policy is important.

Q. We don't fit all three segments, can we still apply?
A. Yes, providing your proposal addresses the health and wellbeing of older people. Proposals with either a community regeneration or intergenerational element are likely to score higher. We score this under 'Focus'. We do not fund programmes unless there is a direct benefit to older people.

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.