

# MCCARTHY STONE FOUNDATION

## Funding Webinar – January 31<sup>st</sup> 2023

1. About Our Foundation
2. Our Vision, Mission, Values
3. Our strategic themes
4. Our current programmes
5. Application process and key dates
6. Assessment of applications
7. Top Tips
8. FAQs
9. Your questions



# ABOUT OUR FOUNDATION

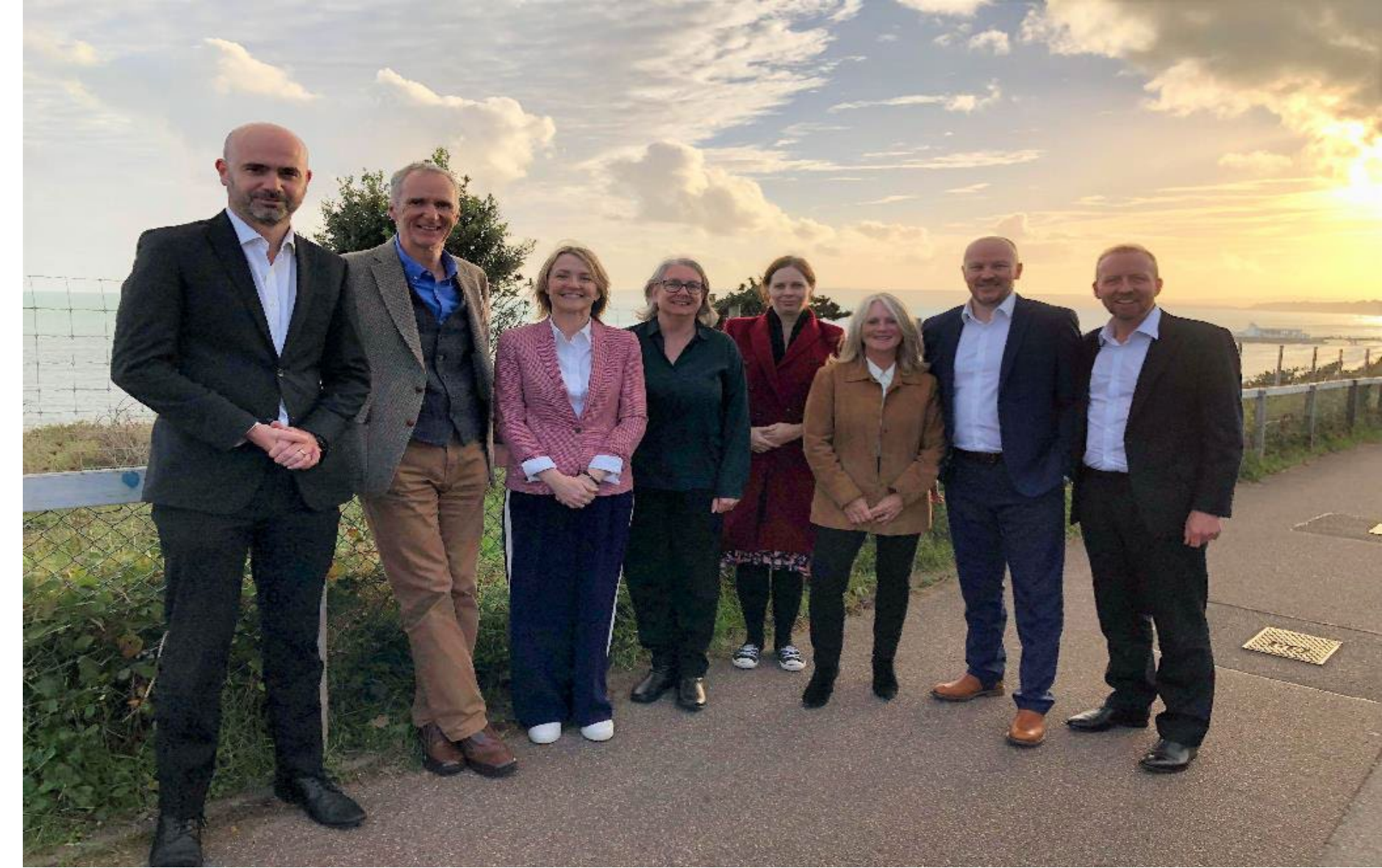
The McCarthy Stone Foundation is an independent charity that supports grassroots, local charities and community groups and other non-profit organisations across England, Scotland and Wales, principally through the provision of financial grants. It is a corporate foundation, connected to the UK's largest retirement living developer McCarthy Stone and governed by a board of seven trustees, five of whom are external to McCarthy Stone.

The foundation was launched in December 2020, and in 2022 awarded 109 grants, totalling £215,085, a significant increase on the previous year (40 grants totalling £87,674). Total income also increased from £293,469 in 2021 to £342,314 in 2022.

The foundation is funded through a combination of employee, customer and supplier fundraising efforts, with support costs and an annual donation provided by the McCarthy Stone group. The foundation is registered with the Fundraising Regulator and is a member of the Association of Charitable Foundations.

Day to day management of the foundation is led by Graeme Marsh (Head of Foundation) with the close support of Julia Laister (Foundation Coordinator).

[graeme.marsh@mccarthyandstone-foundation.org.uk](mailto:graeme.marsh@mccarthyandstone-foundation.org.uk)  
[julia.laister@mccarthyandstone-foundation.org.uk](mailto:julia.laister@mccarthyandstone-foundation.org.uk)



The Foundation Board from L-R: Paul Teverson, Martin Edwards, Elizabeth Marsh, Sarah Allport, Kimberley Smith, Paula Jordan, Graeme Marsh (Foundation Manager) and John Tonkiss (Chair).



Graeme Marsh – Head of Foundation



Julia Laister – Foundation Coordinator

# VISION, MISSION, VALUES

Our *vision* is a society where older people are valued, connected and engaged with their communities.

Our *mission* is to help grassroots charities and community groups support older people by engaging the McCarthy Stone Group, People, Customers, and Partners.

Our *values* are:

- We are positive about ageing.
- We are transparent and accountable
- We are committed to improvement



Pupils from Green Ridge Academy visiting the Bartletts Residential Care Home in Buckinghamshire.

*“The grant enabled us to continue creating community links, building intergenerational relationships, and making memories for both the children and the older people we visit”*

Green Ridge Academy, Bedfordshire

# STRATEGIC THEMES

**We will support local, grassroots, volunteer driven charities and community groups working with older people.**

- Our approach is rooted in the belief that people need people, and that local community led organisations are best placed to identify need and provide support to people aged 65 and over. We believe in the power of small grants to make a big impact for grassroots organisations that have an income of under £500k p.a.

**We will provide funding and resources to drive connection and purpose for people in later life.**

- Social connection is critical for physical and mental health and has a wide range of cognitive benefits. Social activity can decline in later life as people retire from work, families move, and circumstances change. Covid-19 further highlighted this and continues to impact on the most vulnerable.

**We will promote intergenerational relationships, bringing young and old together.**

- Bringing generations together brings older people a sense of purpose, invigorating and energising, while helping reduce loneliness and depression. It has also been shown to help those living with dementia. For young people it enables the sharing of life experiences, wisdom, values and joy, while teaching empathy and patience.

**We will support community regeneration that enables connection and engages those in later life.**

- Shared community spaces, from gardens to village halls, can be valuable hubs for older people to come together, take part in activity, learn new skills, and contribute to their local area while engaging with others.



Canford ARCH, £500 Christmas Grant

# OUR CURRENT PROGRAMMES



## Winter Warm Spaces

- Grants of £750 to cover costs of providing a warm space for older people in the winter months.
- Priority given to organisations under £100,000 income with less than 6 months of free reserves.
- Single Stage Application
- Open to registered charities and community groups only
- Restricted to facility costs/venue hire in line with programme objectives



## Community Grants

- Grants of £1000 to £7500 available for organisations or projects aligned with our work to connect and engage older people (over 65).
- £500,000 income limit, organisations with more than 6 months of reserves should supply reserve policy.
- Unrestricted funding available to organisations aligned with our charitable aims. Restricted funding for projects as part of an organisation with a wider remit of work (e.g., village halls).
- Two stage application
- Open to registered charities, community groups, and CICs (CICs must be limited by guarantee and funding will be restricted).

# WINTER WARMER GRANTS – APPLICATION PROCESS

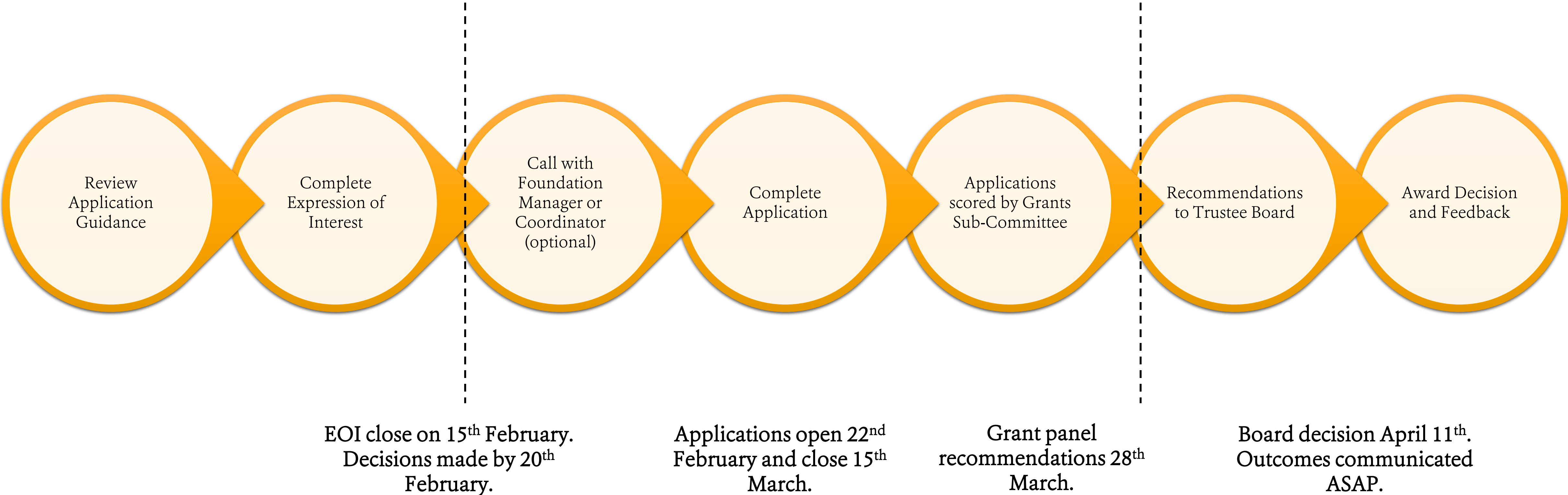


Applications now open

Applications close February 28<sup>th</sup>. Depending on demand they may close sooner.

Grants awarded Mid-March

# COMMUNITY GRANTS – APPLICATION PROCESS



# SCORING RUBRIC

Criteria	Excellent (4)	Good (3)	Fair (2)	Poor (1)
<b>Focus</b> 30%	<ul style="list-style-type: none"> <li>Strong alignment with our charitable aims and primary grant focus.</li> <li>Clear evidence of a need within their community.</li> <li><b>A strong match for our work</b></li> </ul>	<ul style="list-style-type: none"> <li>Good alignment with our charitable aims and secondary grant focus.</li> <li>Some evidence of a need within their community.</li> <li><b>A good match for our work</b></li> </ul>	<ul style="list-style-type: none"> <li>Some alignment with our charitable aims but not our primary or secondary grant focus.</li> <li>Limited evidence of a need within their community.</li> <li><b>Some aspects match with our work</b></li> </ul>	<ul style="list-style-type: none"> <li>No clear alignment with any of our charitable aims.</li> <li>There is no evidence of a need within their community.</li> <li><b>No real match with our work</b></li> </ul>
<b>Impact</b> 30%	<ul style="list-style-type: none"> <li>If delivered to plan, the project will deliver the outcomes intended.</li> <li>Budgets are reasonable, proportionate and excellent value for money</li> <li>Monitoring and evaluation is clear and appropriate</li> <li><b>Funding will make a <i>clear impact</i> on the project or organisation and community</b></li> </ul>	<ul style="list-style-type: none"> <li>If delivered to plan, the project should deliver the outcomes intended.</li> <li>Budgets are reasonable, proportionate and good value for money</li> <li>Monitoring and evaluation is present, but limited.</li> <li><b>Funding will make <i>some impact</i> on the project or organisation and community</b></li> </ul>	<ul style="list-style-type: none"> <li>If delivered to plan, the project may deliver the outcomes intended.</li> <li>Budgets are mainly reasonable and proportionate but limited value for money</li> <li>Monitoring and evaluation is incomplete or inappropriate</li> <li><b>Funding will make <i>limited impact</i> on the project or organisation and community</b></li> </ul>	<ul style="list-style-type: none"> <li>If delivered to plan, the project is unlikely to deliver the outcomes intended.</li> <li>Budgets are unclear, unreasonable, or poor value for money</li> <li>No monitoring or evaluation is evident.</li> <li><b>Funding will make a <i>little or no impact</i> on the project or organisation and community</b></li> </ul>
<b>Risk</b> 20%	<ul style="list-style-type: none"> <li>Clear experience and/or expertise to deliver the project</li> <li>Any delivery risks are clearly mitigated</li> <li>Well governed and managed and is contributing to the costs of the project or service.</li> <li><b>The project <i>will</i> be delivered to plan and therefore <i>will</i> deliver the outcomes it intends.</b></li> </ul>	<ul style="list-style-type: none"> <li>Some experience and/or expertise to deliver the project</li> <li>Delivery risks can be mitigated</li> <li>Well governed and managed is contributing to the costs of the project or service</li> <li><b>The project <i>should</i> be delivered to plan and therefore <i>should</i> deliver the outcomes it intends.</b></li> </ul>	<ul style="list-style-type: none"> <li>Limited experience and/or expertise to deliver the project</li> <li>Delivery risks are not mitigated</li> <li>Governance and management is acceptable and there is no contribution to the costs of the project or service</li> <li><b>The project <i>maybe</i> delivered to plan and therefore <i>may</i> deliver the outcomes it intends.</b></li> </ul>	<ul style="list-style-type: none"> <li>No experience and/or expertise to deliver the project</li> <li>Delivery risks are not possible to mitigate</li> <li>The level of governance and management is questionable and there is no contribution to the costs of the project or service.</li> <li><b>The project is <i>unlikely</i> to be delivered to plan and therefore <i>unlikely</i> to deliver the outcomes it intends.</b></li> </ul>
<b>Organisation</b> 20%	<ul style="list-style-type: none"> <li>Highly community focused and volunteer driven</li> <li>Reserves levels are not excessive and a clear policy is in place to manage this.</li> <li>Services are inclusive and accessible</li> <li>Positive reputational benefits</li> <li><b>The organisation has a <i>strong</i> alignment with the values and purpose of our Foundation.</b></li> </ul>	<ul style="list-style-type: none"> <li>Mostly community focused and volunteer driven</li> <li>Reserves levels are acceptable and a clear policy is in place to manage this</li> <li>Services are inclusive and accessible</li> <li>Good reputational benefits</li> <li><b>The organisation has a <i>good</i> alignment with the values and purpose of our Foundation.</b></li> </ul>	<ul style="list-style-type: none"> <li>Partially community focused and volunteer driven</li> <li>Reserves levels are high, but a clear policy is in place to manage this</li> <li>Most services are inclusive and accessible</li> <li>Neutral reputation benefits</li> <li><b>The organisation has <i>limited</i> alignment with the values and purpose of our Foundation.</b></li> </ul>	<ul style="list-style-type: none"> <li>Not community focused or volunteer driven</li> <li>Reserves levels are excessive and no clear policy is in place to manage this</li> <li>Services are not inclusive an/or accessible</li> <li>Possible negative reputation concerns</li> <li><b>The organisation has <i>no</i> alignment with the values and purpose of our Foundation.</b></li> </ul>



# COMMUNITY GRANTS – CASE STUDIES

Grant support from McCarthy Stone has helped us to build cross-generational friendships and use creativity to elevate the voices of those who are at risk of loneliness and isolation in Gateshead. The whole process has been personalised and transparent, through regularly checking in, inviting us to contribute towards their content and sharing their positive impact on other organisations across the country. Thank you all!

Hannah Wood, Equal Arts, Gateshead, £5000

'The grant has enabled a significant step-change for our charity by allowing us to take on our first office space since we terminated our previous lease at the start of the pandemic. Because of this our projects can scale more rapidly, our team can work more efficiently and morale has been increased - resulting in more beneficiaries reached and decreased levels of loneliness in older adults throughout our communities. We are thrilled that the Foundation chose to back our organisation in such a transformational way'.

Louise Golden, CEO, The Together Project, London - £5000

“We have really appreciated the hands on and invested approach you have as a Funder, its great to know you don't just want to give us funds but are interested in what we are doing and the impact we are having. The grant has given us more flexibility to meet the changing needs and to keep up with the growth we are experiencing. We are always receiving requests for support and have a great community buy in with new volunteers coming forward. The funding ensures we are able to keep up with this growth.”

Angela Barry, CEO, Reach Family Project, Bolton - £5000



## GRAEME'S TOP TIPS!

- Be clear about how your application aligns with our mission and focus.
- Consider using a logic model approach to demonstrate what will change and who for.
- Demonstrate a local need
- Use a full cost recovery approach if applying for project funding
- Take your time
- Include all the requested information and be concise
- Ask for help if you need it.



# FAQS

Q. Do you fund salaries/core costs? *Yes, we expect to see your indirect and support costs reflected in your budget. We will fund core costs solely if there is a good alignment between your organisational aims and ours.*

Q. Do you award unrestricted funding? *Yes, but only to organisation's whose mission and aims align with our own.*

Q. Do you fund CICs/Parish Councils/Schools ? *We prioritise registered charities and community groups, although we will consider CICs limited by guarantee and delivering something we would consider 'charitable in nature'. CIC funding will always be restricted.*

Q. Do you fund in Northern Ireland? *No, I'm afraid we do not.*

Q. Do you fund in Scotland? *We aim to distribute around 6 -10% of funding to Scotland.*

Q. Can we apply if we have received funding before? *Yes, provided reporting has been completed.*

Q. Who do you consider an 'older person' ? *Anyone over the age of 65.*

Q. What is the success rate of applications? *Around 50% at the full application stage. Overall around 10% for all applicants expressing an interest.*

Q. Do you give feedback on decisions? *If we feel it will help with future applications yes. In general no, we simply do not have the resource to do this for everyone.*

Q. What is your policy on applicants reserves? *Reserves should have a robust justification. If holding more than 6 months we will ask for your policy and justification for doing so. This enables us to prioritise funding for immediate need.*

Q. Can the application be saved and returned to later? *No (we are working on this), so note the questions and write out your answers on a separate document ahead of applying.*

Q. Are there any things you do not fund? *We do not fund general appeals, religious activity, public bodies to carry out statutory obligations, activities solely supporting animal welfare, activities that have already taken place, onward grant making, counselling services, privately owned companies without charitable status, community groups without a bank account/constitution, and we don't fund individuals.*

