



Why have Partner Charities?

The primary reasons are that we believe:

- closer cooperation will lead to better projects and more focused grant applications
- both the Foundation and the individual charities will be able to plan longer term
- value for money and efficiency will improve
- it will demonstrate that two charities can work together more productively with common purpose

How do Partner Charities benefit?

They will secure grant funding over the medium term. Obviously, grants will be subject to our assessment criteria and the individual projects must meet the Foundation's objectives. However, these charities will know that they will be at the "front of the queue" and if the projects submitted and the reasoning for individual grants meet our criteria, they will be supported.

Through closer collaboration ideas will be shared about how we can jointly move projects and grant support forward. Those discussions will inform grant applications so that when submitted they will be in the best possible shape. There would be opportunities to jointly initiate new projects.

Applications will be fast tracked because these charities will become increasingly well known to the Foundation. A proven track record will have been demonstrated.

The Foundation will set a funding budget for a rolling five year programme for each individual charity. The grant budget is a guide not a constraint but nor is it an entitlement. This funding budget will be regularly reviewed and adjusted based on performance but also taking account of the financial strength of the Foundation.

In practice each charity will know at all times what the five year grant budget is and how much remains. It could mean the charity making grant applications annually but equally could result in applications made less frequently to fund bigger and more ambitious projects. Grant applications could and are often used to fund part of a larger programme. Leverage through "matched funding" could be employed. The Foundation's approach will always be to look at the merits of the proposal and the track record of

the charity and if justified would always consider a larger grant in excess of the budget. To be effective, flexibility must be built into the relationships.

Individual grant applications would normally be made up to 12 months in advance of the grant being available.

A closer and maturing relationship will enable the Foundation to improve its approach to the Partner Charity arrangements and grant making in general through constructive dialogue.

What are we asking from the Partner Charities?

Share with the Foundation their plans for their charity. They may have programmes that have been broken down into work streams or self-standing components which are best treated as individual "projects". Other programmes are more appropriately embraced as a single project. Within every programme/project there may be a range of needs each justifying a grant. Some more complex programmes such as research would require a more comprehensive explanation and in these cases an **Executive Summary** would be needed. We have produced an Executive Summary outline which PCs could use. How programmes and projects are constructed and managed are matters for the PC. Such Executive Summaries should be reviewed by the charity regularly and updates sent to the Foundation. If no changes have occurred this should be confirmed.

To help understand and plan for the programmes and projects we make use of our **Partner Charity Priority List** ranking the grant applications they would like to submit over the medium term. An individual proposal's priority ranking and grant requirements will be influenced by both need and timing. The Foundation would discuss and agree the priority list with the charity. To be effective the Priority List must be regularly updated and shared with the Foundation. Once an application for a grant has been submitted the status of that application should be updated through to approval. It is probable that competing and new projects may result in priorities changing and in some cases some being removed from the list. The Priority List represents the position at the time it is completed and that is why it must be updated at least annually and shared with the Foundation.

Each programme/project and individual grant proposals would need to be justified on their merits and comply with our criteria and framework. Key areas of support and those that will not be considered are set out in notes **"What areas will tend to find favour?"** and **"What are the key areas not supported?"** below. These lists should not be seen as comprehensive and a fuller exposition can be found in our **Grant Process and Strategy & Policy**

guides. Discussions about the Priority List will help clarify whether any particular project could be considered.

Demonstrate value for money using the purchasing power of the charity to obtain the best price and terms. Suppliers should realise that the Foundation is funding, for example, new equipment and if pricing is not competitive then they risk the order not being placed.

Regular reporting of the project to implementation stage and then updates of progress usually annually. The use of blogs and features produced by the Partner Charity and published on our website would form part of this work.

What areas would we fund?

- Equipment/kit to improve operational efficiency and/or extend the scope of critical projects
- Equipment/kit used to advance essential research although early stage research will not be supported
- Identifiable estate undertakings forming part of a focused project i.e. not a general facility, office or operational function. For example, the provision of a garden area for disabled residents at a house.
- Projects that are aimed directly at improving the lives of the target group of people by providing equipment or facilities.

What are the key areas not supported?

- Early stage research
- Cost of PhD students or support of individuals generally
- PC's own overheads or general funding
- Projects normally funded by the public sector, statutory bodies or own resources. This includes for research areas laboratory equipment that would/should be provided by the institute/university/body involved.
- Projects already completed i.e. retrospective funding
- Revenue expenditure such as fees or licences.
- In part or whole of what is essentially major building works

Why are Communications so important?

It is important that we get the message out particularly to the public at large about what we are doing, the projects and programmes we are supporting and who we are working with in partnership. Use of a full array

of communication channels are open to both the Partner Charities and the Foundation.

A Joint Communications Plan to ensure we have an effective structure and how it would be delivered is useful. This plan would be reviewed and updated as required.

Blogs posted on our site are an effective way of keeping the public as well as supporters and other charities informed about what we are doing, how the Partner Charities approach is working and how individual grants are making a difference.

These blogs would be pitched at the public and enriched by embracing those related human stories with the objective of informing and capturing support. The power of public opinion should not be underestimated.

It is important that we reach out to the public at large to both inform and embrace them. We encourage all our Partner Charities to have a web site or parts of a website focused on getting the messages out to the public. This approach is particularly important for charities engaged in research where they normally aim their work and communications at a narrow group of people.