

SOMFAWN MEETING

Castle Cary 6 June 2006

Grants from Lloyds TSB

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Regional Manager (South West)

WHAT IS TO BE COVERED?

- Who are we?
- What do we fund?
- How much?
- What don't we fund?
- Timescales
- How do you apply?
- Hints & tips
- How to contact us

WHO ARE WE?

- Four independent Foundations
- Originated in the old TSB Foundations
- Merged with Lloyds Bank Charitable Trust in 1995
- One of Lloyds TSB Group's largest shareholders
- Own approx. 1.4% of Lloyds TSB's total group share capital

WHO ARE WE?

- Legally independent of Lloyds TSB group
- Board of 12 Trustees chosen for their local knowledge & involvement
- Headquarters staff based in London
- Nine regional and one Wales office
- Two staff in most regions

WHAT DO WE FUND?

- Registered charities / industrial & provident societies / organisations with income less than £1000 per year
- CORE FUNDING:-
For example: staff costs, office costs, training
- CAPITAL FUNDING:-
Equipment: for example play equipment and computers
- PROJECT FUNDING:-
Often a mix of core & capital funding

WHAT DO WE FUND?

Local examples from early 2006:

- **Bath** Percy Community Centre Children's Services Co-ordinator £10,000
- **Bridgwater** CAB – Sedgemoor Part time Admin Assistant and on costs £4,733
Middlezoy Community Project Accessible toilets £1,000
- **Taunton area** Village Hall Tables and chairs £1,000
- **Wellington** Wimbleball Sailing Club Small pontoon for disabled people £600
- **Weston-super-Mare** Safety Zone 2000 Service to disadvantaged children £2,000
- **Somerset – other projects**
Rethink Information point for mental health sufferers in Burnham-on-Sea £7,437
Somerset Community Foundation Printing, research materials and receptions £7,500

WHAT DO WE FUND?

THREE REGIONAL PRIORITY AREAS FOR 2006

- Charities whose work helps address rural disadvantage
- Development of charities whose work addresses the needs of diverse communities; and to support organisations working to assimilate refugees and asylum seekers into their communities
- Support charities whose work addresses the Foundation's mission and who wish to:
 - evaluate their work
 - inform the direction of their services
 - demonstrate the outcomes and impact of their work

HOW MUCH?

- The four Foundations received over £31 million in 2005
- England & Wales Foundation received about 72% of this = approx £22.5 million
- 65% went to the nine regions & Wales
- The **South West** received about **£1.3 million**
- Each quarter some **£350,000** is available for grants in the South West
- We average **about 125** applications per quarter, **50% successful**, average amount **about £4600**

HOW MUCH?

- IF YOU FIT A PRIORITY AREA:-
Up to £10,000 (exceptionally two years funding may be awarded)
- IF YOU DO NOT FIT A PRIORITY AREA:-
Up to £5,000
- Unlikely to get more than £15,000 over two years
- Average grant - £4600 (likely to increase slightly)
- Success rate – about 50% (want this % higher)

WHAT DON'T WE FUND?

- Activities that have a statutory responsibility, for example schools, NHS
- Animal welfare or environmental work
- Outside U.K.
- Promotion of religion
- Individuals
- Building work (except perhaps for disabled access)
- Sponsorship/marketing
-and more (see our website)

TIMESCALES

- Four trustee Board meetings each year:
- March, June, September & December
- Cut off dates generally 6/7 weeks before
- 98% of all applications dealt with in 3 months
- Two year gap between funding
- One year if you are unsuccessful

HOW DO YOU APPLY?

- We prefer to do pre-application visits to discuss your ideas
- Complete a simple application form
- Available in paper copy or from our website
- There are no trick questions
- Enclose ALL necessary additional information.
- Call us if you have a query

HINTS & TIPS

- Always **call us for advice before applying** and stay within the amounts suggested.
- Trustees are interested in strategic issues as most assessments are good v good, not good v bad.
- Assume we don't know anything but don't exaggerate – we are looking for honest answers.
- Applications are affected by factors outside your control:-
 - high levels of free reserves
 - a high number of bids from charities in your location
 - a high number of bids from charities working in your field
- Try and tell a 'good story'.
- Be clear about why you want LTSB funding – don't just 'cut and paste' from other bids.

HINTS & TIPS

- If you have been successful with us before – don't just assume you will get funding again.
- We get many applications from some sectors / locations – it is increasingly competitive, so show why your project is distinctive and meets identified needs.
- Be clear about your relationship with other funders – especially statutory sector – we will not just be there to pick up reduced/stopped council or health funding.
- Remember we are interested in the 'outcomes' – what difference will our support make to the disadvantaged.
- Include everything requested.
- If you aren't successful – you can ask why.

HOW TO CONTACT US

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Lloyds TSB Foundation for England and Wales

