



Lloyds TSB | Foundation for England and Wales

Trust and Foundation Funding

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England & Wales



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Our survey

**What small and medium sized
charities told us in 2009**



Survey results

- **50% have seen a fall in income**
- **Smallest charities hit the hardest**
- **41% say it is harder to raise funds this year**
- **Core costs increasingly hard to find**
- **Demand for services increasing and not able to be met**
- **Cost cutting measures increasingly necessary**
- **Charities have been working hard to find alternative funding sources**



Current funding needs

- 35% charities interviewed see funding of core services as key to surviving- only 7% see new or innovation as key
- 395 found it increasingly difficult to secure organisational costs
- Continued reliance on Trust and Foundation funding(96%)Public sector grants(77% and contracts(61%) despite efforts to diversify



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What is the perceived response
from funders



Charities view of funders

- 40% believe that changing priorities of funders are having a negative impact in an already difficult environment with moves to short term funding and overly restrictive funding
- 64% have had to increase their time and capacity to secure future funding
- Unwillingness to cover full costs by funders
- Concern regarding public sector contracts and use of environment to impose tougher terms when negotiating contracts



What charities told us would help

- Fundraising support particular for charities with incomes under £50,000
- Raising profile through increased media and publicity
- Business planning



Who we are and what can we do?

- One of the UK's leading grant makers
- Largest independent corporate foundation and a top ten grant making trust
- We are a registered charity
- Our covenanted income comes from Lloyds banking Group, averaged over 3 years
- Our income is £22 m in 2009
- We have national strength and reach



Still at the heart of our work

Supporting small & medium charities that help disadvantaged people who live in England or Wales to play a fuller role in the community





Our focus remains on people

- Poor life choices/chances
- Social exclusion/isolation
- Chaotic lives
- Can't be heard





Our continued focus on your needs

- Supporting new and established work
- Core costs so charities can deliver core services





Our focus on lasting change

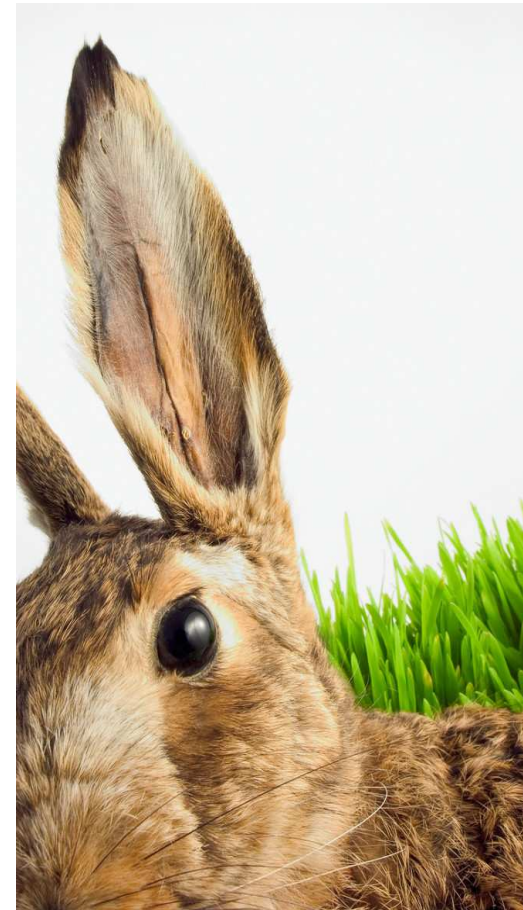
- Support for charities that deliver lasting changes for individuals/communities
- Charities must show tangible changes for users





We listen and respond

- Listening & hearing what will make the difference
- Responding directly to applicants' needs





Providing funding at the heart of communities

- 97% of local authorities
- 40% to top 20 deprived areas
- Over 1800 jobs and 5000 volunteering opportunities





Our continued commitment

- Smaller underfunded charities
- Maintaining our 2009 funding at 2008 level
- However 3500 requests; 1500 eligible and approximately 700 funded in a year





Customer service matters to us

- Simple streamlined approach to save time and money for charities
- On line charity eligibility at:
www.lloydstsbfoundations.org.uk
- Personal support - we visit every applicant over £5k
- We guide charities & signpost

Lloyds TSB | Foundation for England and Wales
Guidelines for charities
applying for a grant
Updated May 2008





Simplifying how to apply

- On-line charity eligibility questionnaire launched at:
www.lloydstsbfoundations.org.uk
- If charity eligible one of our team calls to discuss potential application
- Potential applicants must speak to us before submitting application





Tips to being successful

- **Do your homework**
- **Plan a proper timetable**
- **Does your funding need fit with the funders criteria and priorities?**
- **How many different sources might you need to apply to secure one grant?**
- **What flexibility is there in the ask?**



Tips to being successful

- **Use available resources**
- **Network locally and sectorally**
- **Be realistic**
- **Build an evidence base**
- **Involve users**
- **Demonstrate the passion**



Approaching the Foundation

- **We focus on small and medium sized charities**
- **We focus on disadvantaged people**
- **We are looking for lasting changes and benefits**
- **We operate a balanced portfolio approach**