

# **Cabinet Office**

## **Local Charities and Community Groups Match Fund**

### **GUIDANCE NOTES**

#### **About Cabinet Office**

We support the Prime Minister and ensure the effective running of Government. We are also the corporate headquarters for Government, in partnership with HM Treasury, and we take the lead in certain policy areas.

#### **About Office for Civil Society**

We help to grow a stronger civil society. This includes growing social action; creating the conditions for a more independent and resilient voluntary, community and social enterprise sector; promoting social investment; leading across government on the development of mutuals; developing government policy on mission-led businesses; supporting youth policy, leading on the creation of opportunities outside school for young people to develop skills and have a stake in society; and expanding the National Citizen Service.

#### **About these Notes**

Read these notes carefully before you fill in your application form. But make sure that you keep them - if we like your proposed project we may invite you to an interview.

This information was published in August 2016.

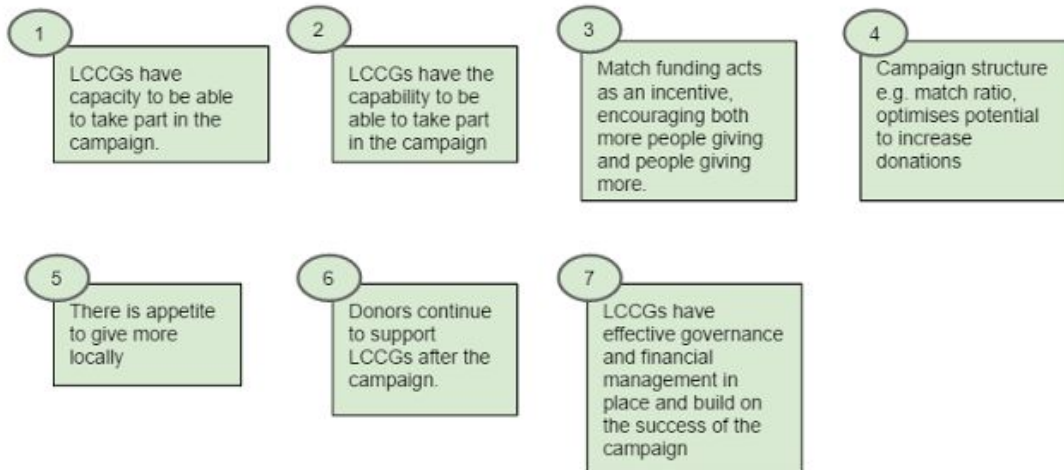
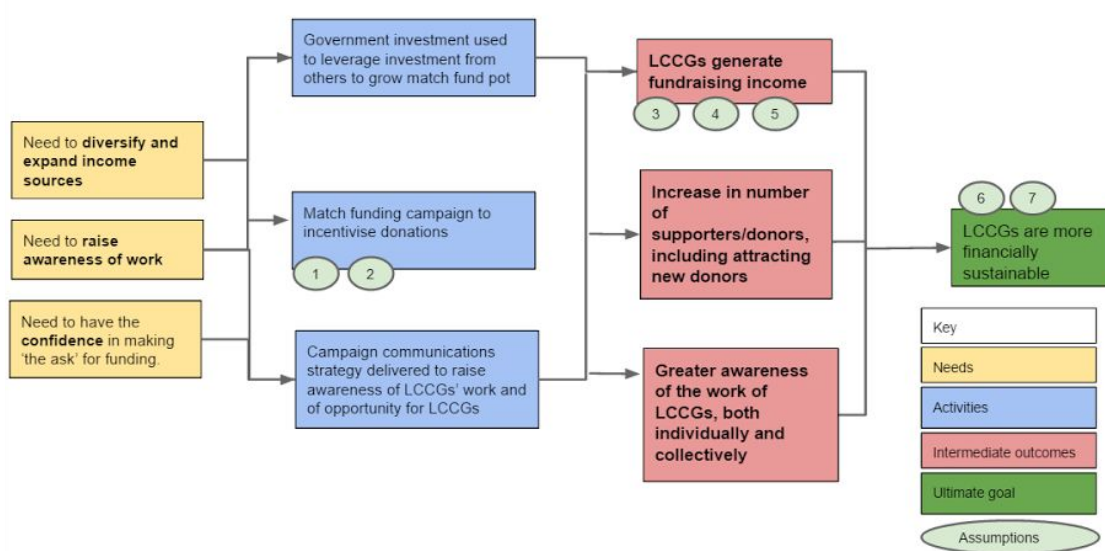
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# PART ONE Overview of the programme

## Summary

Figure 1: Theory of Change for Local Charities and Community Groups Match Fund



### What are we looking for?

The Government recognises that local charities and community groups can need to diversify and expand their income sources. There is also a need further to raise awareness of the work of local charities and community groups. We also recognise that local charities and community groups benefit from having clear opportunities to make 'the ask' of supporters.

The Government's investment of at least £250,000 will act as match funding in a fundraising campaign targeted at local charities and community groups. The Theory of Change at Figure 1 sets out the intermediate outcomes and ultimate goal we are interested in.

The Government has an aspiration for its financial support to be matched by support from philanthropists, foundations and/or others to create a total match fund pot of £1m, to then be matched in the campaign.

The match fund is intended to form part of Government's plans for a Local Charities Day, a celebration of local charities and community groups that will take place later this year which was [announced](#) by the Minister for Civil Society on 14th July. The exact date is still to be determined, and there remains some flexibility on this date, and the timing of this may be influenced by the match fund proposals received.

The Office for Civil Society currently therefore anticipates selecting one campaign to support with the match fund. However we will have a significant interest in applications that present partnerships capable of expanding the reach, eligibility and impact of a match funding campaign.

Responsibility will sit with the provider to have a clear and robust due diligence process in place regarding which organisations receive match funding.

### Who can apply?

You can apply if you believe you have the expertise and capacity to deliver a match funding campaign to commence in December 2016 at the latest to incentivise giving to local charities and community groups.

You can apply if you are:

- a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.
- A public sector body
- A business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action, or business involved in the delivery of public services.

### How much is available?

The Government is offering an investment of at least £250k to act as match funding in a fundraising campaign, and 100% of this £250k should be used to match donations. In addition, applicants are asked to set out in their bids any reasonable

costs requested to be met by Government, in light of Government's overall level of contribution to the match fund pot.

The money is being provided by the Office for Civil Society.

### The application process

The application process has four stages:

1. You need to complete the application form where you tell us about the project you would like funding for, how you will run it and what difference it would make.
2. We will use the information that you give us in your application form to make a firm decision about whether your project is eligible or not. We will then evaluate projects that meet all the eligibility criteria.
3. We will invite shortlisted candidates to an interview.
4. We will then make a firm decision on whether we will fund your proposed project.

### Timescales

Applications must be received no later than end of Sunday 21st August, and you must be confident of your ability to set up and deliver your project so that it is fully operational by December 2016 at the latest. A timeline is set out below. Please note that the timescales for the launch, delivery and impact measurement of the campaign will be influenced by the campaign selected through the open competition.

<b>Timeline</b>	
8 Aug 2016	Application window opens
by 12 Aug 2016	Any questions by potential applicants submitted
by 16 Aug 2016	Answers to questions by potential applicants published
21 Aug 2016	Deadline for applications
26 Aug 2016	Interviews for shortlisted applicants
Sep 2016	Notification of successful applicant
Sep 2016	Due diligence and agreement on financial support produced

Sep 2016	Announcement of successful applicant
Sep 2016	Campaign set-up commences
Oct- Dec 2016	Commencement of campaign (exact timeframes to be determined based on timeline of campaign selected)
31st Mar 2017	All spending needs to be committed by 31st March and spent by 30th June 2017
30 Jun 2017	Deadline for all spend of financial support

### **Before you apply**

Please ensure you read the guidance notes and complete each of the sections prior to submission. Incomplete applications will not be considered.

Contact us on [socialaction@cabinetoffice.gov.uk](mailto:socialaction@cabinetoffice.gov.uk) if you have any questions by 12th August. Please note that after that date, we may not be able to answer your queries. We will publish the answers to questions we receive by this deadline by potential applicants by 16th August.

### **How to apply**

Save: Once you are ready to submit the form, ensure that you save the final version. Keep a printed copy if you prefer.

Collate: Ensure your form is complete and that you have got all the required supporting documents at hand.

Send: Forms must be emailed to [socialaction@cabinetoffice.gov.uk](mailto:socialaction@cabinetoffice.gov.uk) along with your supporting documents (if required).

Confirmation: Expect an automated reply from us once you have sent us your application.

## **PART TWO      Who should our funding help?**

### **What difference are we trying to make?**

This match fund financial support is to incentivise giving to local charities and community groups.

The programme has the intermediate outcomes as listed in our Theory of Change shown in Figure 1. We use the words intermediate outcome to describe the intermediate changes or differences we want our funding to make.

The ultimate goal of this programme is to improve the financial sustainability of local charities and community groups, supporting their vital work. By ultimate goal we mean the key change or difference we want our funding to make.

The campaign we fund must help achieve those intermediate outcomes and must contribute to achieving the ultimate goal of our programme.

A Theory of Change shows the path from needs to activities to outcomes to impact. It describes the change we want to make and the steps involved in making that change happen. Theories of change also depict the assumptions that lie behind a reasoning, and where possible, these assumptions are backed up by evidence. Theories of change are often shown in a diagram, allowing to see the causal links between all the steps.

If you apply for funding, we will ask you to provide details of your own project's intermediate outcomes that link to the intermediate outcomes of this financial support. Part of our decision to award you financial support is based on our assessment of the quality of the intermediate outcomes of your project which must:

- help to achieve the ultimate goal of the programme;
- be ambitious in the impact they will have on your beneficiaries;
- be realistic and achievable by the end of your project.

We will ask you to set indicators for each intermediate outcome. Indicators are signs that the change or difference is happening and they help you to see whether your project is being effective. If your application is successful, you will use these indicators to measure and track your progress towards achieving your intermediate outcomes and the ultimate goal.

## **PART THREE                      Who can apply?**

You can apply for this Local Charities and Community Groups Match Fund if you are:

- a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.
- A public sector body
- A business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action, or business involved in the delivery of public services

Under this programme we will not normally give financial support to organisations that:

- are applying on behalf of other organisations and are not the lead organisation of a proposed partnership
- are in poor financial health.
- have demonstrated poor management of financial support from us in the past.

You can apply if you believe you have the expertise and capacity to deliver a match funding campaign to commence in December 2016 at the latest to incentivise giving to local charities and community groups.

### **England programme**

The Local Charities and Community Groups Match Fund is an Office for Civil Society investment. OCS funds activities which directly or indirectly benefit the whole or part of England (whether or not they also benefit any other area). OCS cannot fund projects that are purely beneficial to those outside England.

### **Partnerships**

Organisations can apply in partnership but it is not a requirement. However we will have a significant interest in applications that present partnerships capable of expanding the reach, eligibility and impact of a match funding campaign.

If you are applying in partnership, only the lead organisation can submit an application.

Working together can help to enhance existing provision, and brings different sets of skills together to provide improved offers for beneficiaries. If you are working in partnership with other organisations, you should ensure that the divisions of



responsibility and how you will manage your relationship with them are set out clearly in your application.

## **PART FOUR      How much money is available and for what?**

We currently anticipate selecting one campaign to support with the match fund investment of at least £250,000 for the financial year April 2016 to March 2017. All funding has to be committed by 31st March 2017 and be spent by 30th June 2017.

100% of this £250k investment is to be used to match donations.

In addition, applicants are asked to set out in their bids any reasonable costs requested to be met by Government, in light of Government's overall level of contribution to the match fund pot. This money must be used primarily to fund revenue costs, and the total expenditure on capital items for this project must not exceed the value of £5,000.

### **What will we pay for?**

Please see above.

The £250,000 match fund financial support must be used 100% to match donations, without deduction.

Regarding any reasonable costs requested to be met by Government, we can pay for revenue and capital costs, subject to below.

Revenue costs include salaries, travel, running costs and volunteer expenses. As regards salaries for staff, we will assess on a case by case basis whether these would be eligible for funding. Applicants need to demonstrate very clearly in their application how the resource they are bidding for supports the programme.

Capital costs include buying equipment, vehicles, constructing a building or altering a building. Capital items are fixed assets with a useful economic life of more than a year. Capital costs must not exceed £5,000.

### **Match funding**

You cannot use this financial support as a partnership or match funding for financial support from other Office for Civil Society funding programmes.

## **PART FIVE      What is the application process?**

### **Process and timetable**

We open the programme for applications on 8th August.



We will publish the answers to questions we receive by 12th August from potential applicants by 16th August.



You send us your application form and any other information we ask for by end of 21st August.



We will invite shortlisted applicants to interview by 24th August.



If you are a shortlisted applicant, you attend the interview on 26 August 2016.



If you are successful at the interview, we will notify you in September 2016.



If you are successful, an agreement will be issued in September 2016 and you will start mobilising your project in September 2016.

If your application was not successful, we anticipate notifying you in September 2016.

What we will do.

What you must do.

### **How do we assess your application?**

Proposals will be assessed by a panel. Please assume that assessors have no background knowledge of your organisation, its aims and what it does. It is therefore important that your application is as clear, concise and unambiguous as possible.

### Initial sift

We will review your application to check that the information in the body of the application meets the eligibility checklist.

### Evaluation of eligible bids

We will then score eligible bids in line with our key criteria.

The table below sets out what we are looking for, the weighting in the bid evaluation, and the questions we will use to make our assessment.

<b>The successful bidder will...</b>	<b>Weighting</b>	<b>Questions</b>
Have a strong track record of delivering match-funded fundraising campaigns that benefit the whole or part of England.	15%	Q1
have a convincing argument for why the proposed project is likely to have the impact we are looking for.	30%	Q2 - Q5
be able and willing to measure the impact of their project.	10%	Q6, Q7
have the capacity to deliver at pace with good value for money.	25%	Q8 - Q15
Please note 20% weighting will then be applied to an overall assessment of the proposed campaign's fit and alignment with plans for Local Charities Day.	20%	To include consideration of Q1-Q15

Shortlisted applicants will be interviewed on 26th August. The interview panel may include an external party/external parties. You must be available for an interview then if you are shortlisted.

### Moderation

Finally, we will decide the project we would like to fund. At this stage, we take into account the overall score and the interview score, including assessment of proposed campaigns' fit and alignment with plans for Local Charities Day.

## **PART SIX            Application form guidance**

This section provides further detail on each question in the application form.

### **Eligibility checklist**

If you answer **NO** to any of these questions then your application will not be eligible.

#### ***My organisation is one of the following: Answer Y/N***

- a legally constituted Civil Society Organisation (this could be a company limited by guarantee, or CIC for example) which may, or may not, also have charitable status.
- A public sector body
- A business with a social mission or clear objectives in its corporate social responsibility policy toward increasing social action, or business involved in the delivery of public services

Your organisation must be one of the above.

#### ***Has experience of delivering match-funded fundraising campaigns that benefit the whole or part of England. Answer Y/N***

Given the need to mobilise quickly and provide confidence in the strong value for money, we are looking to support an organisation with a track record of delivering match-funded, fundraising campaigns that benefit the whole or part of England.

#### ***The benefits of my project focus on England, and has the potential to reach all areas of England. Answer Y/N***

Your proposal must focus on England because the investment is financed by the Office for Civil Society. We are also interested in funding a campaign that has a wide geographical reach, with potential to reach all areas of England.

#### ***The organisation(s) submitting this proposal are in a position to accept an offer by September 2016, with the match funding campaign to have commenced in December 2016 at the very latest. Answer Y/N***

The match fund is intended to form part of Government's plans for a Local Charities Day, a celebration of local charities and community groups that will take place later this year which was [announced](#) by the Minister for Civil Society on 14th July. The exact date is still to be determined, and there remains some flexibility on this date, and the timing of this may be influenced by the match fund proposals received.

***My project will ensure all funding is spent by 31st March 2017, or committed to be spent within three months of that date. Answer Y/N***

You must be able to spend the full amount awarded by June 2017. Evidence of spend will be required.

***Before the campaign commences, my project will expand the size of the match fund pot by generating additional support from philanthropists, foundations and/or others. Answer Y/N***

Your proposal must be able to expand the size of the match fund pot. Please note Government has an aspiration for its financial support to be matched by support from philanthropists, foundations and/or others to create a total match fund pot of £1m to then be used in the campaign.

***My project will benefit local charities and community groups. Answer Y/N***

Your proposal must focus on local charities and community groups.

***If I have requested additional funding for any reasonable costs to be met by Government, this money will be used primarily to fund revenue costs, and the total expenditure on capital items for this project will not exceed the value of £5,000. Answer Y/N***

Eligible activities would normally incur costs over a variety of items, which could include staff travel and project lead supervision costs. Capital items are fixed assets with a useful economic life of more than one year, which could include IT and office equipment.

***My organisation would have financial control over any financial support that I was awarded rather than any other organisation. Answer Y/N***

We will only fund a project by an organisation(s) which has financial control over the financial support that they have been awarded. If you are applying as a partnership, only the lead organisation can submit an application and will also need to be responsible for managing the financial support and demonstrate that appropriate arrangements are in place for the oversight of any funds paid on to other members of the partnership.

***My organisation, and any organisations it will work in partnership with, has/have an Equality and Diversity policy that applies to its recruitment, HR and other standard business practices and is in line with [Equality Act 2010](#).***

As a partner of the Office for Civil Society, we would expect your organisation, and any organisation you will partner with, to conduct its business in a way that has due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.

Protected characteristics include: age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex and sexual orientation.

***I and my partners will have due regard to equalities, in line with the Equality Act 2010, when designing and delivering this match fund.***

You will need to ensure that no potential user of any match funding platform is excluded on the basis of disability or other protected characteristics.

The need for disabled access, including the needs of those with mental as well as physical disabilities, must be taken into account when designing the platform. Reasonable and proportionate adjustments should be made where appropriate to the format of the delivery method.

You will be expected to support the Office for Civil Society in the delivery of its Public Sector Equality Duty.

***I have completed every section of the form.***

We will only consider applications which have every section completed.

## **Section 1 - Your proposal**

Through this section we want to understand some of the details of your proposal. You need to set out your proposal very clearly so that we can assess:

- Your track record in delivering a match funding campaign(s) that incentivised giving.
- How well your proposal fits with the target group we are interested in: local charities and community groups.
- how likely it is that the campaign you are proposing will have an impact on the intermediate outcomes and the ultimate goal we are interested in.

This section is worth 45% of evaluation.

<b>We are interested in funding a campaign which...</b>	<b>We will not fund a campaign which...</b>
... is by a provider(s) with a proven track record of delivering match funding successfully through a fundraising campaign that benefits the whole or part of England, and of expanding the size of the match fund pot from different sources.	...is by a provider(s) with no track record of delivering match funding successfully through a fundraising campaign that benefits the whole or part of England, nor of expanding the size of the match fund pot from different sources.
....inspires confidence that it will be able to grow the match fund pot	....provides little confidence that the campaign will grow the match fund pot.
... sets out a convincing plan for how the campaign will release match funding at greatest impact	... provides little confidence that the campaign will release match funding at greatest impact.
...sets out a convincing plan for how the campaign could align with Local Charities Day	...fails to provide a convincing plan for how the campaign could align with Local Charities Day
... targets local charities and community groups	... targets any type of charity.
... is large enough in scale.	... will only reach a small number of beneficiaries.
....inspires confidence that robust due diligence processes are in place regarding eligible beneficiaries	...inspires little confidence that appropriate due diligence processes are in place regarding eligible beneficiaries
...has a clear communications strategy to raise awareness and generate support from local charities and community groups and the public, inspiring confidence that local charities and community groups will be mobilised in time	...does not have a clear communications strategy for how it will raise awareness and generate support from local charities and community groups and the public, and fails to inspire confidence that local charities and community groups will be mobilised in time



...provides convincing evidence that the campaign proposed will have the impacts we are looking for.	...inspires little confidence that the campaign proposed will have the impacts we are looking for.
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### **Question 1**

**Please describe a previous match-funded, fundraising campaign(s) that you have delivered to incentivise giving, and its reach and impact. (*maximum 400 words*)**

Your answer should include:

- The size of the match fund pot, and whether and how this was grown from philanthropists, foundations and others.
- The structure of the campaign (e.g. match ratio, timeframe) and who was eligible.
- The communications strategy used.
- The impact the match funding campaign(s) had, including in terms of total amount raised, number of donors, number of new donors generated, the number of beneficiaries reached and its impact on raising awareness of their work.

### **Question 2**

**Please describe the match-funded, fundraising campaign you would like us to fund. This may be extending an existing campaign, or a new campaign. (*maximum 600 words*)**

Your answer should include:

- How you would expand the size of the match fund pot, in light of Government's aspiration for its investment to leverage contributions from philanthropists, foundations and others to create a total match fund pot of £1m. Please include details of any secured or anticipated commitments, clearly separated, to grow the size of the match fund pot, and any further steps you intend to take before the start of the potential campaign.
- How the campaign would operate, based on evidence, including whether it is an existing planned campaign or a new campaign, when it would be launched

and its period of operation, how the match funding would be released, the match ratio and whether donations matched would be one-off and/or regular.

- Details of any further aspects of a campaign that you would plan to incorporate (e.g. support to help beneficiaries build capability and sustainability, for instance to be ready effectively to use match funding, aiding their organisational development, or awards or bonus prizes.)
- How it could align with plans for a Local Charities Day to be held later this year. Please also detail whether there is any flexibility regarding the timeframe of the campaign to ensure best alignment with a Local Charities Day.
- Please also indicate whether, should Government be able to provide further investment to the match fund pot beyond the £250k, the campaign would be able to incorporate this into their plans at a later stage.

Please note we will have a significant interest in applications that present partnerships capable of expanding the reach, eligibility and impact of a match funding campaign.

### **Question 3**

**Which local charities and community groups would be eligible and able to receive the match funding for their fundraising, and why? (*maximum 400 words*)**

Your answer should include:

- Whether, and if so, how, you would define “local charities and community groups” for the purposes of this campaign.
- Explanation of which local charities and community groups would be eligible to receive match funding for their fundraising, and the rationale for this, and how many this would entail.
- Any costs that local charities and community groups would have to pay, including to be eligible or through the match funding campaign.
- What due diligence you would carry out on eligible organisations. Please note responsibility will sit with the provider to have a clear and robust due diligence process in place regarding which organisations receive match funding. In addition, to demonstrate their commitment to responsible fundraising, it would

be best practice for all charities to be registered with the Fundraising Regulator and comply with its Code of Practice.

- The extent to which, and how, you assess the sustainability of local charities and community groups in considering eligibility.

#### **Question 4**

**How would you raise awareness of and engagement with the campaign, including amongst local charities and community groups and the public? (maximum 500 words)**

We are keen to ensure the campaign has the greatest reach possible, both amongst local charities and community groups as beneficiaries, and amongst the public as potential donors.

Your answer should include:

- How you would mobilise local charities and community groups to ensure their engagement, in significant numbers, in the campaign.
- Description of your communications strategy, including where relevant use of online, social media and TV, to maximise awareness of, interest in and support for the match fund campaign, in particular amongst:
  - Eligible local charities and community groups
  - The public
- Details of any partnerships you would implement to ensure greatest reach and awareness-raising.

#### **Question 5**

**What is the likely impact of the campaign you propose on the outcomes and the goal we are interested in as set out in our Theory of Change (Figure 1)? What is the evidence for this? (maximum 500 words)**

Your answer should include:

- a persuasive argument, including evidence, for why the campaign proposed will have the impacts we are looking for. We are interested in the intermediate outcomes and the ultimate goal listed in our Theory of Change shown in Figure 1.

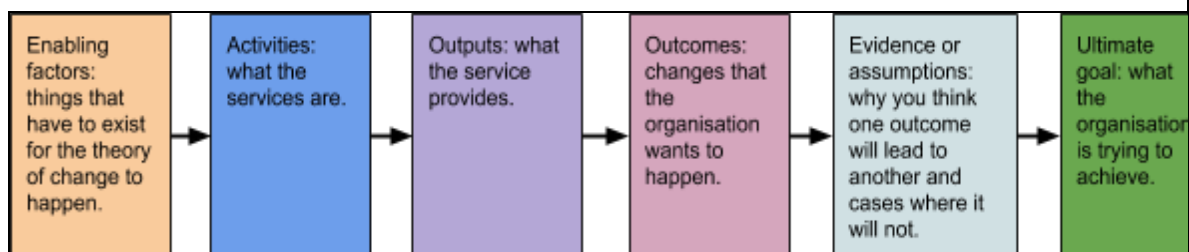
Within this, please include, based on evidence, expectations for the total amount raised, number of donors, number of new donors generated, the number of local charities and community groups reached and its impact on raising awareness of their work.

- Details of any other outcomes your campaign will deliver.
- Your own Theory of Change. This is not compulsory, but we recommend to applicants to develop and attach a Theory of Change as a supporting document with the application.

### Theory of change

New Philanthropy Capital provide guidance on writing a theory of change in “Theory of Change: The beginning of making a difference” written by Angela Kail and Christopher Lumley (April 2012). You can access this at [thinknpc.org/publications/theory-of-change](http://thinknpc.org/publications/theory-of-change).

Your Theory of Change should outline how the outputs of your project lead to your intended impact. This is usually presented in a series of chains, like the one below (also from the above named publication).



You may have one overarching ultimate goal, but you will have a number of different outputs and activities for your project. You can see an example theory of change on the NPC website address above.

## Section 2 - Measurement of impact

Through this section we want to know how well placed you will be to measure the impact of your campaign and work with our in-house evaluator.

This section is worth 10% in the assessment.

We are interested in funding a campaign which...	We will not fund a campaign which...
...gives us confidence that the organisation shares our enthusiasm for carrying out impact measurement, and has the thinking, culture, people and processes in place to collect the data needed and work effectively with our in-house evaluator.	...gives us concerns about the organisation's enthusiasm for carrying out impact measurement; or about their thinking, culture, people and processes on collecting/analysing data and ability to work with our in-house evaluator.

### **Question 6**

***Please tell us what data you collected, and how, from a previous match-funded, fundraising campaign(s) that you have run. How does this enable you to demonstrate impact? (maximum 300 words)***

Your answer should include:

- what data you collect.
- how you collect the data.
- how you store the data.
- how you have used the data that you collected.

### **Question 7**

***Please tell us how you would measure the impact of the proposed match funding campaign, including working with our in-house evaluators. (maximum 400 words)***

We have an in-house evaluator and we will ask them to work with the successful applicant to design an impact measurement strategy for the match fund campaign.

In this section you should include:

- who in your organisation would be responsible for working with our evaluator, and how much time they would be able to devote to it.

- what data you believe you would need to collect to measure the intermediate outcomes and the ultimate goal of this programme, and how you envisage collecting it.
- any assistance you feel you need from the evaluator.

### Section 3 - Capacity to deliver

Through this section we want to understand how well placed you are to deliver on your proposal, delivering good value for money.

In this section, we will be looking for:

- your ability to set up your project quickly.
- strong performance management skills in place to ensure outcomes are met.

This section is worth 25% in the assessment.

<b>We are interested in funding a campaign which...</b>	<b>We will not fund a campaign which...</b>
... gives us confidence in the experience of key staff and their roles within the campaign.	... gives us concerns about the experience of key staff and their roles.
... gives us confidence in the value added of any partnership work and the arrangements in place to manage the partnership.	... gives us concerns about the value added of any partnership work and the arrangements in place to manage the partnership.
... sets out a comprehensive mobilisation plan that gives us strong confidence the organisation will be able to mobilise quickly.	... gives us concerns that the organisation will not be able to mobilise in time.
... gives us strong confidence that the organisation would be capable both of spotting any dip in performance, and addressing it.	... gives us concerns that the organisation would not be able to identify a dip in performance and address it.

...provides a clear set of milestones and deliverables	...fails to provide a clear set of milestones and deliverables
... gives us confidence that the organisation will deliver value for money, including consideration of its capacity to lever in additional or in-kind resources.	... gives us concerns about whether the organisation will deliver value for money.

**Question 8**

***Who will be directly responsible for the day-to-day running of the campaign, and what is their experience? (maximum 500 words)***

Your answer should include:

- names and job titles of relevant staff.
- their experience.
- if relevant, details of the roles you plan to recruit and the skills and experience you will be looking for.

**Question 9**

***If you are working in partnership with other organisations, who are they and how will you manage your relationship with them? (maximum 500 words)***

Your answer should include:

- who are your partner organisations.
- what is their experience.
- what value will they add to the campaign you propose.
- what arrangements you will put in place to manage your relationship with them.

### **Question 10**

***We plan to confirm the award to the successful applicant in September 2016, and wish to align the campaign with plans for Local Charities Day. The exact date of Local Charities Day is still to be determined - there remains some flexibility on this date, and the timing of this may be influenced by the match fund proposals received. The match funding campaign will need to be fully operational at the latest in December 2016. Please set out your mobilisation plan detailing how you would set up/grow the campaign between having your financial support confirmed and the start of the campaign. (maximum 500 words)***

We want to be sure that you have a good understanding of, and robust plans in place for, what you will need to do if you are to set up/grow the campaign to be fully operational in December 2016 at the very latest.

Your answer should include:

- Engagement with philanthropists, foundations and others to grow the size of the match fund pot
- Identification and targeting of eligible local charities and community groups
- Any required testing or launch of platform
- Liaising with our in-house evaluators and setting up processes for data collection.
- Risks that may impact on delivery, and your approach to mitigating them
- Launch of communications strategy
- Anticipated launch of match funding campaign

### **Question 11**

***How will you know, during the delivery of the campaign, whether or not it is having the impact you intend? And how would you act to improve performance if necessary? (maximum 500 words)***

We want to be confident that the campaign will have the impact you hope it will, and that you will be able to turn things around if your impact is not as good as expected. So we want to be sure you will be able to spot when things are not going as planned, and act to manage performance if necessary.



**Question 12**

***Please specify the milestones and key deliverables for your proposal in the table provided.***

Your project milestones need to take into account timeframes and deadlines for delivery of activities and outputs. They need to link to the proposed spend and the overall budget for your project. Your project may be monitored and assessed against these milestones and this may form part of the agreement if we do make you an offer.

This should include at least milestones on confirmation of additional funding brought to the match fund pot by philanthropists, foundations and others, launch of communications strategy, including announcement of the campaign, commencement of the campaign, closure of the campaign and evaluation timetable.

It should also include expectations on key deliverables such as total amount raised for local charities and community groups, number of donors, number of new donors generated, the number of local charities and community groups reached and its impact on raising awareness of their work.

**Question 13**

***Please provide a budget breakdown for your project.***

You should use the table provided.

Please include the Government investment in the match fund pot and any investment in the pot from philanthropists, foundations and/or others.

Please also set out any reasonable costs requested to be met by Government, in light of Government's overall level of contribution to the match fund pot. Please also indicate whether you have secured any funding or in-kind support for these costs, whether from an external source or your own organisation, pro bono or related to a corporate social responsibility scheme.

We might require you to provide us with more detail on your spend profile during the assessment process, if you are successful at the initial stage.

**Question 14**

***Please list any other recent funding proposals you have made to Cabinet Office, other Government departments or other external funders for this kind of work.***

Please list funding proposals in the last three years, how much you have applied for, what your bid was for and whether or not you have been successful.

Funder	What was the funding for	Amount requested (£)	Secured? Y/N

**Question 15**

***Please complete the table below to show your organisation’s recent financial track record for the last two financial years for which you have audited accounts, and management figures for the current year to date.***

Please enter your financial information in the table provided. We might ask for a copy of your audited accounts and management accounts during the assessment process, if you are successful at the initial stage.

	Annual accounts 2014 – 2015	Annual accounts 2015 - 2016	Management figures YTD	Projected full year figures
Total Income				
Total expenditure				
<b>Surplus/deficit</b>				
Current assets				
Current liabilities				
Fixed assets				
Term liabilities				
Unrestricted funds				

Restricted funds				
<b>Total funds</b>				

## **PART SEVEN                      If you are awarded financial support**

### **Acceptance of funding**

The successful applicant will be notified in September 2016. If you are successful in your application you will be required to accept the offer of funding within one month of the date of the offer letter. During that time we may also ask you to work with the in-house evaluator to ensure that your project can be robustly evaluated. Any offers not accepted within this timescale may be withdrawn unless an extension to the offer has been agreed in writing (email and letter).

To accept our offer the lead organisation must sign both copies of the offer letter and terms and conditions, returning one copy to us and keeping the other for your records. You must send us a certified copy of a Board resolution accepting the financial support offer and authorising specific individuals to sign the Offer Letter and draw down requests. We can provide a sample Board resolution to the successful applicant on request.

In addition, we will require:

- **An original bank statement** (less than 3 months old) for the account into which the funds will be paid. This account must be in the legal name of your organisation. We will copy it and return to you.
- **A completed Bank/Building Society Account Details Form.** This form asks you to provide some information about your bank account and account signatories. You will need to take this form to your bank and have them counter sign this.

As well as this general documentation we may require other evidence as specific pre-conditions relating to your financial support and this must be provided before the drawdown of funds. For example, we would require confirmation that any relevant match funding that your proposal is reliant on is secure.

Your Offer Letter will provide more detailed guidance on the documents required in order to draw down your financial support.

## Unsuccessful applications

We anticipate unsuccessful applicants will be informed in September 2016. We will not be able to provide detailed verbal feedback on unsuccessful cases. We will however write to applicants indicating the key reason for the application being unsuccessful.

Please note that the decision will be final.

If you have a complaint about the way your application is handled, email us at [socialaction@cabinetoffice.gov.uk](mailto:socialaction@cabinetoffice.gov.uk).

## **Reporting and monitoring**

### Drawing down money

Payment will be made according to the payment schedules agreed in the offer of financial support, outlining key performance indicators and timeframes required for the programme. Payments will not be made if required key performance indicators have not been achieved. Changes to payment schedules can be made, but will need to be agreed by both parties.

When you have fulfilled your pre-conditions you can then start to draw down the money. All agreed funding must be drawn as agreed and spent within 3 months of receipt of funding at each instalment.

A Drawdown Request Form will be included with your Offer Letter. When you are ready to drawdown the money you need to complete this form, attach any evidence requested and ensure it is signed by someone who is authorised by the Board Resolution / Management Committee minutes before submission to us.

Funds will be transferred to your bank account within 6 to 10 working days after the receipt of your Drawdown Request Form.

### Monitoring requirements

It is a condition of any financial support awarded that recipients must submit information relating to expenditure, achievement of key performance indicators and impact measurement and any other subject related to the financial support. We may ask you to take part in follow up surveys and provide materials for case studies and other publicity so that other organisations can learn from your work. In addition to the regular reporting, the successful applicant will also need to provide ad hoc

information about programme delivery. We will aim to give as much notice as possible.