

At the heart of funding
Scotland's charities

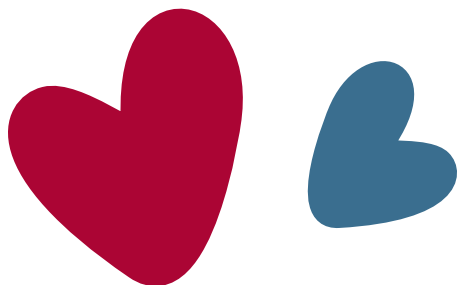
www.ltsbfoundationforscotland.org.uk
0870 902 1201



Standard Grant Scheme
criteria, priorities & principles

January 2009 - December 2011

Designed & produced by www.aviam.co.uk



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Criteria

Lloyds TSB Foundation for Scotland will accept applications for the Standard Grant Scheme from:

Charities which are focused on improving quality of life and creating equality of opportunity for people in Scotland.



Clydesdale Befriending Group for Adults with Learning Disabilities

The Criteria are set in a way which attempts to include a wide variety of charitable activity which will provide benefit that could:

- Improve support for at risk groups.
- Reduce isolation.
- Improve community cohesion and integration.
- Improve health and well-being.
- Increase independence.
- Improve family welfare.
- Increase life skills, or
- Increase citizenship.



Stirling Carers Centre



The Yard



Sounds of Progress

Principles

The following statements set out the Foundation's principles of effective governance, transparency and good practice. It is expected that charities acknowledge the importance of the following and can demonstrate commitment to those that are relevant:

- Encouraging the involvement of volunteers.
- Evidencing need for new and existing services.
- Adopting sound evaluation and monitoring procedures.
- Operating with openness and clear accountability.
- Complying with relevant regulation/inspection as required.
- Caring for the safety of vulnerable groups via effective vetting procedures including 'Disclosure Scotland' checks.
- Implementing equal opportunities particularly with regard to recruitment.
- Fulfilling duties as a responsible employer.
- Consulting and involving users.
- Collecting information through contacts or research to establish, consolidate and promote good practice.
- Avoiding duplication by adopting a collaborative partnership approach, and networking with other agencies/providers.
- Recognising cultural diversity and particular needs that may arise.
- On-going staff/volunteer/organisational development.

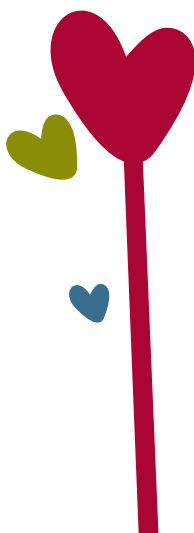
Priorities

Priority status will be attributed to initiatives/services which are clearly targeted at working with *at risk or disadvantaged groups*, and that demonstrate the long term benefit that support from this Foundation could bring.

Applicants are advised to consult the **What we don't fund** section of this document for specific areas of work that the Trustees will not consider for support.

Points to note

- Applicant organisations must be registered as a charity.
- Awards are made on merit to charities for work in Scotland with no geographic bias.
- Trustees are committed to considering support for unpopular/under-funded areas of work with vulnerable client groups.
- Support is available for established services/projects as well as new initiatives. Both are seen as having equal value.
- Funding for capital and/or running costs is available.
- Six closing dates for applications are set in line with the six Trustees' meetings which take place each year. There is a three month period between the relevant closing date and a decision being taken on your application.
- Two categories of application are available – a very brief application form for awards under £2,500, which is only available for charities with an income of under £25,000, and a standard form with no restriction on charity income levels. Applicants must choose one or the other.
- Submissions must be presented on the appropriate application form, which must not be altered; comprehensive guidance notes are available to assist with its completion.
- Applications are invited seeking awards over one, two or three years. Where an award is made over one year, re-application is not possible until at least 12 months have elapsed from the date that the original grant was awarded. Where a multi-year award has been granted, no further applications will be considered until 12 months have elapsed from the date of the final scheduled payment.
- If an application is unsuccessful, you are not eligible to reapply to this programme for 12 months.



Loanhead Community Learning Centre



What we don't fund

- Organisations which are not formally recognised as charities.
- Charities which pay their board members or have paid employees who also hold a position as Director on the Board. This principle also applies to charities operating as Collectives.
- Individuals – including students.
- Animal welfare.
- Initiatives that are focused on sport, the arts or the environment, except where the subject is being used as a vehicle to engage with socially excluded groups to increase life skills.
- Conservation and protection of flora and fauna.
- Mainstream activities and statutory requirements of hospitals and medical centres, schools, universities and colleges.
- Sponsorship or marketing appeals.
- Establishment/preservation of endowment funds.
- Activities that collect funds for subsequent grant making to other organisations and/or individuals.
- Expeditions or overseas travel.
- Building projects for places of worship, other than where such buildings provide accommodation for community groups.
- Building projects for heritage centres, visitor centres, museums and theatres.
- Historic restoration/historic publications.
- Retrospective funding.
- Promotion of religion.
- Hobby groups.
- One-off events such as Gala Days.

Other programmes

Although each charity can only make one application and hold one award at a time under the Standard Grant Scheme, the Foundation operates a range of programmes to which charities can apply simultaneously if they are eligible.

Capacity Building Programme

This programme has been designed to help your charity build its capacity and meet difficult and challenging situations by helping to identify strengths and opportunities for development in the areas of:

- Governance.
- Strategic planning.
- Business planning.
- Resource and financial planning.
- Fundraising.
- Marketing.
- Information technology.
- Staff training and development.

There are two stages:

Stage one

An independent adviser will spend the equivalent of two days evaluating where you are and giving pointers on the way forward, culminating in the provision of a report.

Stage two

Further support is available to develop some of the improvement areas which have been identified. An independent adviser will be allocated to work with you for an agreed number of days, the cost of which will be awarded to your charity for onward payment to your adviser at a pre-agreed set rate.

Pre-submission advice

Pre-submission advice and information on all our programmes is available to potential applicant charities in advance of making an application.

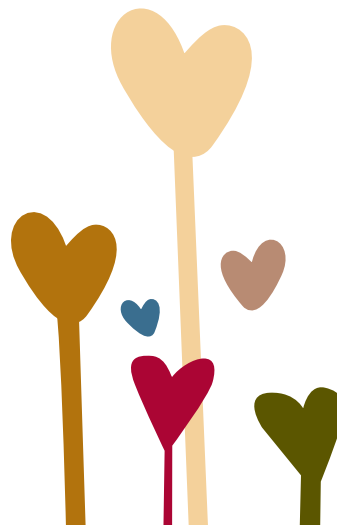
If you would like assistance or further information, give us a call on **0870 902 1201**



Shetland Community Drugs Team



Children in Peru supported by the Vine Trust



A single application form covers both stages, and there are no closing dates – you can apply to this programme at any time.

The programme is also open to Scottish charities working overseas.

A member of the Foundation's staff is dedicated to managing this programme.

Partnership Drugs Initiative (PDI)

The PDI encourages and enables charities to work in partnership with other agencies (both voluntary and statutory) to ensure a holistic approach to meeting the needs of children and young people affected by substance misuse. Charities are encouraged to form a relationship with PDI staff within this Foundation to be guided through the process of forming local partnerships and making an application. There are two opportunities to apply to this programme each year and a two stage application process operates.

Other programmes continued

Overseas Programme

The Overseas Programme is an annual grant scheme where the Foundation makes awards to charities with a base in Scotland that work overseas in fragile communities. Awards are made for development of charities at home and for the initiation or continuation of sustainable indigenous services abroad.

Collaboration Initiatives

From time to time, grants may be awarded to groups of charities engaged in genuine collaboration initiatives. These awards are granted for a one-year period only and are normally for a specific piece of partnership work. Early contact with the Foundation prior to applications of this nature being developed is required.

Charities that receive funding for such collaborations may also be eligible to apply for a separate grant for their own activities.

Research Initiatives

The Foundation makes awards for medical, scientific and social research through partner organisations specialising in such work. The aim of this programme is to help inform the work of charities in a range of fields tackling social disadvantage and improving quality of life. The Trustees choose partners to participate in this programme, which is reviewed every three years.



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