**Lloyd’s Patriotic Fund – Charity Partner Selection Pack**

Lloyd’s Patriotic Fund has united the Lloyd’s insurance market for the last two hundred years to support veterans and their families today.

Founded in 1803, Lloyd’s Patriotic Fund is the oldest military charity of its kind. We are proud of our history and contributions to support the armed forces community on behalf of the Lloyd’s market. Today, we focus on improving the transition to civilian life for veterans and their families who need the most help. Lloyd’s Patriotic Fund unites support from the market to aid the successful transition to civilian life for veterans and their families to ensure successful futures.

Lloyd’s Patriotic Fund is a registered charity independent of Lloyd’s. For more information on our governance, accounts and finances, please visit the Charity Commissions website [here.](http://beta.charitycommission.gov.uk/charity-details/?regid=210173&subid=0)

**Our Focus**

Each year, 17,000 personnel leave the UK Armed Forces and return to civilian life, and many of them have families. For the majority, the transition to civilian life is successful, but a quarter find it more difficult, leaving them in a position of vulnerability.

The Transition Mapping Study (FiMT and The Futures Company 2013) calculated the cost to the UK of unsuccessful transition to be almost £114 million. We also know that the time between individuals leaving the Armed Forces and reaching out for help is far longer than it should be. Leaving the services can take a toll on the employment prospects and wellbeing of personnel’s partners and we know that one in four armed forces families have sought mental health support and face barriers to access employment.

This is where we come in: supporting the transition to civilian life for veterans and their families who need it the most. As the needs of individuals and their families are increasingly complex, LPF will work with partners that take a holistic approach to improving this transition for the hardest to reach families.

We aim to help improve the transition for “at risk” groups (such as bereaved families, or early service leavers families) which focuses on *mental health and building resilience*, and *employment support and financial independence* to enable veterans and their families to build successful civilian lives and careers.

**Guidance Notes**

Applications from charities are encouraged so we can achieve our aims together. We are looking to partner with one or two charities for up to three years. A core part of this partnership will be a grant of up to £200,000 per year to fund a project that supports our focus.

With a total fund of £200,000 per year, it is up to the discretion of trustees as to how the fund will be distributed. Decision making will be shaped by the ability to demonstrate the need, the impact and relevance to the strategy of Lloyd’s Patriotic Fund. There will be a lead trustee allocated to the partnership, and an annual re-approval process.

Priority will be given to:

* Projects which encourage collaboration within the sector.
* Projects which support COBSEO and the Government’s Veteran’s Strategy.
* Projects in which service users input into identifying the need for the project.
* Projects which support the most “at risk” groups that are hardest to reach.
* Projects which are evidenced by research to support the proposal.
* Projects which demonstrate long term sustainability once the partnership has ended.
* Projects which clearly demonstrate how they meet an unmet need and key issues in the sector.
* Projects which offer engagement opportunities for the Lloyd’s market in terms of business collaboration, fundraising, volunteering, and awareness raising.

**Eligibility Criteria:**

In terms of the project funding, the following is in scope for support:

* Salaries to deliver the project.
* Materials and equipment for the project.
* Training of charity employees to deliver the project.
* Activities for the project.
* Non-regimental charities.
* Civilian charities supporting the ex-military community.
* Umbrella organisations.
* Former serving personnel of the British Armed Forces and their families.
* Bereaved families of former serving personnel.
* Work to support “at risk” groups.
* Organisations that have received a donation from LPF in the past. This could be to continue funding for the same project, fund a different project, or fund the expansion or next phase of the project. Continued funding of the same project or the expansion of a project would only be considered once the impact has been clearly demonstrated.
* Applicants may apply more than once for different projects.

The following is out of scope for support:

* Regimental charities.
* Community interest companies (CIC).
* Individuals.
* Charities that only support a specific sector of society based on ethnicity, faith, sexual orientation or political beliefs.
* Grant giving organisations.
* General ongoing core services and unrestricted funding.
* Serving personnel.
* Contributions directly towards individual beneficiaries or sponsorships of individuals.
* Sponsorship of events, or contributions towards fundraising events.
* Office items or IT equipment for the charity’s own use.
* War memorials.
* Projects supporting education and employability amongst young people in London given Lloyd’s Community Programme’s support for these initiatives.
* Projects that work in the focus areas of Lloyd’s Charities Trust (global disaster reduction) and Lloyd’s Tercentenary Research Foundation (risk related academic research).
* Global and local emergency response appeals as this is channelled through the Corporation of Lloyd’s.
* Ad-hoc donations and any requests for sponsorship from global or local individuals and charities as this is channelled through the Lloyd’s Market Charity Awards.

**2019 Grants**

Lloyd’s Patriotic Fund is also distributing a small number of £10,000 grants to charities and projects that help support our strategy around improving the transition for “at risk” group. The focus is on mental health and building resilience, and employment support and financial independence to enable veterans and their families to build successful civilian lives and careers. Further information can be found in the grant information pack..

**Application Process**Please submit your application along with your most recent financial accounts and the relevant data protection and safeguarding polices by email to Jo Taylor ([jo.taylor@lloyds.com](mailto:jo.taylor@lloyds.com)) by COB Friday 13 September 2019.

Please do not submit any other additional information to support your application.

If there are any questions you are unable to answer at this time, then please write “N/A” or provide as much information as you can, and we will still consider your application. Please do not be deterred from applying because you cannot answer all of the questions as we may be able to work with you to support your application.

Applications will be reviewed by the Lloyd’s Patriotic Fund Selection Committee in September. All applicants will be notified in October if they have been successfully shortlisted or not for the next stage. Unsuccessful applications will only be given written feedback.

If your application is shortlisted to the next stage, you will be invited to the Lloyd’s Patriotic Fund board meeting on Tuesday 23 October for a Q&A session with trustees. Full guidance and support will be given to help you prepare for the presentation.

After the meeting, applicants will be informed if they have been successful, subject to successful completion of due diligence checks and after a Memorandum of Understanding (MoU) between the charity and Lloyd’s Patriotic Fund is drawn up.

Unsuccessful applicants will be given written feedback only as to why they were not successful on this occasion.

Joint Key Performance Indicators will be agreed with the selected partner(s) before launching the partnership(s). In addition, a communications plan and materials will be agreed before the official partnership launch. Regular updates and meetings will take place throughout the partnership. In addition, partners may be asked for additional materials suitable for external publication, including case studies.

**Timeframe**

|  |  |
| --- | --- |
| Application Deadline | Friday 13 September |
| Subcommittee review and shortlist | September |
| Charities notified of outcome | September |
| Shortlisted charities invited to meet with the board | Tuesday 23 October |
| Shortlisted charities informed of outcome of application | October |
| Preparation of partnership launch | November |
| Partnership(s) commence | November |

**Key contact:**

Jo Taylor, Responsible Business Manager, Corporation of Lloyd’s

[jo.taylor@lloyds.com](mailto:jo.taylor@lloyds.com)

+44 (0)20 7327 6208

Don’t hesitate to get in touch if you have any further questions or need any support.

Thank you for applying to Lloyd’s Patriotic Fund.

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| Application Form for Lloyd’s Patriotic Fund Partnership | |
| Organisation Details | |
| Name of your organisation |  |
| Registered address |  |
| Registration status and constitution (registered charity number, franchise etc.) |  |
| Number of employees (headcount) and volunteers in your organisation |  |
| Contact Details | |
| Primary contact name & job title |  |
| Primary contact number |  |
| Primary contact email |  |
| Your Organisation | |
| Aims of your organisation (max 50 words) |  |
| Primary focus area of work- describe your key services & programmes? (max 50 words) |  |
| Geographical focus– demonstrate where your organisation works (max 50 words) |  |
| Describe your beneficiary group (max 50 words) |  |
| Describe how your beneficiaries/service users are engaged in your organisation and involved in decision making processes (max 50 words) |  |
| Engagement | |
| Please explain how the partnership would be mutually beneficial to the Lloyd’s market and your charity. |  |
| Describe how the Lloyd’s market can help your organisation beyond the grant e.g. business collaboration, volunteering, pro- bono support, awareness raising, business collaboration. Please detail what your charity can also offer for the Lloyd’s market. |  |
| Proposed Project - Please tell us about the project you would like funding for | |
| Project name |  |
| Amount requested from LPF (£) per year |  |
| Project aims (max 100 words) |  |
| Project need and scope (max 400 words) – please include:   * How the project meets the objectives of LPF * Who the project aims to benefit * Where the project will be focused * How the need for the project has been identified and evidenced * How the project collaborates with other key stakeholders * How the project complements the work of the sector, COBSEO, veteran’s strategy * What activities you will deliver/what you will do * How the project has been scoped so far (e.g. is this an existing project, new project, how much the project costs to fund, sole funders) * Have you run any similar initiatives before and if yes, outline their achievements |  |
| Project outcomes and impact (max 400 words)- please include:   * Projected outcomes and numbers of people supported in one year and the duration of the project (e.g. * Project impacts * How you will measure this and how you will implement a feedback loop * How the project will be sustainable post partnership |  |
| Please outline any key challenges you foresee with this project and steps that would be taken to overcome them (100 words) |  |
| Please indicate a proposed expenditure budget and timeline for the project, indicating key milestones. | |  |  |  | | --- | --- | --- | |  | Total Project Cost (£) | Amount Requested (£) | | Revenue item or activity | Planned | Planned | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | | Final Total |  |  |   **Key Milestone Dates:** |
| Financials | |
| Annual income and expenditure for past three years:  - total income  - voluntary income  - primary income source  - corporate fundraising income | |  |  |  |  | | --- | --- | --- | --- | |  | **2016** | **2017** | **2018** | | **Total Income** |  |  |  | | **Voluntary** |  |  |  | | **Primary** |  |  |  | | **Corporate** |  |  |  | | **Total Expenditure** |  |  |  | |
| Please state your primary funding sources |  |
| Income forecast for current financial year |  |
| Charitable spend for current financial year:  - level of reserves  - percentage spent on charitable activity  - percentage spent on administration  - percentage spent on income generation |  |
| Please state any known Charity Commission investigations. |  |
| Please include annual financial reports or financial statements covering the last three fiscal years. |  |
| Additional Information and due diligence | |
| Please state any well-known Ambassadors or Supporters. (max 50 words) |  |
| Occasionally, we may ask for charity representatives or beneficiaries to attend and/ or speak at events or in videos, please describe if you are able to provide this. (max 50 words) |  |
| Have you faced any reputational issues in the past 3-5 years and if so what were they and how have you managed these? |  |
| Please list your most recent corporate partners (especially within the insurance sector). Include name, brief description of relationship and value of partnership. (max 50 words) |  |
| Please confirm you are GDPR compliant and have data protection policies and a privacy statement in place. Please attach the relevant policies with the application. |  |
| Please confirm you have child protection policies (if relevant) and safe guarding policies in place. Please attach the relevant policies with the application. |  |
| Please confirm you have code of conduct/behavioural policies in place for staff and volunteers. Please attach the relevant policies with the application. |  |