**Lloyd’s Patriotic Fund – Small Grants Information Pack 2021**

**Our Mission**

[Lloyd’s Patriotic Fund](https://www.lloyds.com/about-lloyds/responsible-business/community-involvement/lloyds-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 positive 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, c17,000 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 approximately one quarter find it more difficult, leaving them in a position of vulnerability.

Leaving the Services can take a toll on the employment prospects and wellbeing of serving person and their family, and we know that one in four armed forces families have sought mental health support and face barriers to access employment.

LPF are also aware of the challenges currently serving families face, particularly for spouses and partners seeking to gain and maintain employment with frequent mobility and absence of their serving partner.

This is where we come in: supporting those in the armed forces community who need it the most. As the needs of individuals and their families are increasingly complex, LPF works with partners who take a holistic approach to support the hardest to reach families.

**Our Current Partners**

We currently have three-year partnerships with RFEA The Forces Employment Charity and Combat Stress, the veteran’s mental health charity. These partnerships focus on improving employment prospects for spouses and partners of serving and ex-serving personnel and conducting pioneering research into coping mechanisms for managing veterans’ mental health.

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.

**Small Grants**

We are now inviting charities supporting the military community in these areas to apply for a

small grant of up to £10,000. As there is limited funding available, we are able to support a small

number of charities only. In previous years, we have funded projects supporting children who

have lost a serving parent, peer support for serving and veterans families, and support for former

spouses of Foreign & Commonwealth suffering domestic abuse.

The military charity sector has been hit hard by the impacts of the Covid-19 pandemic, as the demand for services increase and funding streams decrease. The transition to digital services has been crucial for Armed Forces charities, and we recognise that other major adjustments to

operating models have been necessary. Therefore, our small grants this year are focused on addressing the challenges encountered by military charities as a result of the ongoing pandemic.

We are looking for bespoke projects where our funding will make a real difference but, to help manage expectations we would expect the small grants to benefit charities with an annual income of circa £1million or less.

Consequently, priority will be given to projects/organisations which:

* support the most “at risk” groups that are hardest to reach.
* address challenges exacerbated by the impacts of covid-19.
* evidence how service users are involved and consulted in the project scoping.
* demonstrate how they support unmet needs and key issues in the sector.
* demonstrate good governance through evidence or reference to the COBSEO Governance tool.
* are of small or medium size organisations that demonstrate financial viability, including reserve levels.

**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 fund a different project or fund the expansion or next phase of the project. Continued funding of the same project would only be considered once the impact has been demonstrated.

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 area 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.

**Application Process**

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.

All applicants will be informed if they have been successful by Monday 8 March 2021, and unsuccessful applications will only be given written feedback.

Successful applicants are subject to the completion of due diligence checks and a Funding Agreement between the charity and Lloyd’s Patriotic Fund agreed.

Trustees will require a report for the donation 12 months after the grant is received; which outlines the inputs, outputs and the impacts of the project. A template reporting form and full guidance and support will be provided to successful charities to help achieve this.

**Timeframe**

|  |  |
| --- | --- |
| Application Deadline | Monday 15 February |
| Charities informed of outcome of application | Monday 8 March |
| Preparation of grant administration | March |
| Payment made and partnership commences | Monday 5 April |

**Application checklist**

Please submit the below by email to Responsible Business ([responsiblebusiness@lloyds.com](mailto:responsiblebusiness@lloyds.com)) by Monday 15 February 2021.

|  |  |
| --- | --- |
| **Document** |  |
| Completed application form | Required |
| Latest published trustees’ annual report and accounts | Required |
| Latest annual report (if separate from accounts) | Preferred |
| Child protection and safeguarding policy | Required if relevant |
| Code of conduct/behavioural policy or statement for staff and volunteers | Preferred |
| Diversity and inclusion policy or statement for staff and volunteers | Preferred |
| Ethical investment policy or statement | Preferred if relevant |

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

**Key contact**

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

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

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.

|  |  |  |
| --- | --- | --- |
| Application Form for Lloyd’s Patriotic Fund Small Grant 2021 | | |
| Project Duration/Reporting period | |  |
| Amount requested from LPF (£) for 12month period | |  |
| Expected number of direct beneficiaries | |  |
| Your 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 | |  |
| Primary contact name & job title | |  |
| Primary contact number and email | |  |
| Your Organisation  *Please include; the aims of your organisation, primary focus area of work, key services and programmes, geographical focus, your beneficiary group and how your beneficiaries are engaged in your organisation and involved in decision making processes. (guide: 200 words)* | | |
|  | | |
| Impact of COVID-19  *Please outline future plans for your organisation and key priorities, particularly in reference to COVID-19. Please include impact of COVID-19 on income and forecasts. (guide: 200 words)* | | |
|  | | |
| Proposed Project: need and scope  *Please include who will benefit from the project, where it will be focused, how the need has been identified and evidenced, how the project compliments and collaborates with other stakeholders. (guide: 200 words)* | | |
|  | | |
| Proposed Project: what will you do  *Outline the proposed activities for funding. Please highlight the potential impact of COVID-19 on this funding period, any challenges you foresee and how you plan to overcome them. (guide: 200 words)* | | |
|  | | |
| Proposed Project: who will benefit  *Describe the target beneficiary group. (guide:200 words)* | | |
|  | | |
| Proposed budget and expenditure  *Please complete the table and add additional rows if necessary. Please note the other funding sources if Lloyd’s Patriotic Fund is not the sole funder.* | | |
| |  |  |  | | --- | --- | --- | |  | Total Activity Cost (£) | Amount from LPF (£) | | Revenue item or initiative | Planned | Planned | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | |  |  |  | | Final Total | £ | £ | | | |
| Proposed Project: Outputs, impacts and monitoring and evaluation  *Please include the proposed impacts on beneficiaries or organisations the funding supports and any wider societal impact. Please outline how you will track performance, measure and evaluate the expected impacts and implement a feedback loop. (guide 200 words)* | | |
|  | | |
| Due Diligence | | |
| Most Recent Financial Year (DATES)   |  |  | | --- | --- | | **Total Income** |  | | **Total Expenditure** |  | | **Reserves** |  | | **Investments** |  | | **% spend on charitable activity** |  | | **% spend on administration** |  | | **% spend on income generation** |  | | **Next Financial Year (DATES)**     |  |  | | --- | --- | | **Total Income Forecast** |  | | **Total Expenditure Forecast** |  | | **Reserves Forecast** |  | | **Investments Forecast** |  | | **% spend on charitable activity** |  | | **% spend on administration** |  | | **% spend on income generation** |  | | |
| Please state your primary funding sources | |  |
| Please state any known Charity Commission investigations. | |  |
| Are you a member of COBSEO? | |  |
| Please state your COBSEO governance score (if relevant) and outline your current focus areas for improving your governance. | |  |