

Fundraising Plan 2024

Charitable objects: *To relieve the needs of the elderly in Surrey by any means which is charitable under the laws of England and Wales.*

The charity achieves this through running a befriending project, a community café, and through organising social events and exercise classes.

Aim:

- To secure funding for salary costs (around 70% of annual expenditure) and general running costs.
- Securing project funding for social events and exercise classes, with proportional salary costs built in.
- Capital purchases such as catering equipment, café equipment and new leaflets.

Balance outstanding: charity annual expenditure is usually around £80k per annum.

Project start date: ongoing from January 2024

Potential funders listed in order of application priority - based on likelihood of success and deadlines.

Purpose	Funder	Amount	Deadline	Next steps	Notes
Core	National Lottery Reaching Communities Fund https://www.tnlcommunityfund.org.uk/funding/programmes/reaching-communities-england	£30k	No deadline. Rolling application – can apply at any time	Waiting decision	BID SUBMITTED Can apply again to the same fund after one year (unless the grant is £10k over three years). Can also apply to different NL funds so could look at Awards for All £20k over 2 years. https://www.tnlcommunityfund.org.uk/funding/programmes/national-lottery-awards-for-all-england

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Core	Community Foundation for Surrey https://www.cfsurrey.org.uk/	Grants usually £5-10k	EOI submitted in Nov 2023	Waiting decision	EOI SUBMITTED Grant application submitted for befriending project
Project Core	The Albert Hunt Trust The Albert Hunt Trust, a grant giving charitable trust	Up to £5k	No deadline. Rolling application – can apply at any time	Apply in March 2024	Albert Hunt Trust (AHT) is closing in 2029. Apply under 'Promote Health & Wellbeing' category for shortfall of social events income. AHT list 'carers' or 'social disadvantage' as funding preferences, suggest salary for befriending or project costs for T&M again
Capital or project	Surrey County Council https://www.surreycc.gov.uk/community/make-it-happen/your-local-area/surrey-heath/funding/surrey-heath	Up to £5k	No deadline	Contact Surrey County Council to see if they can support bid	Funding for purchasing outdoor barriers, signage for the café or catering equipment
Project	The Hedley Foundation https://www.hedleyfoundation.org.uk/impact	£3k- £5k	Weds 13 th March	Apply in March	They support: "Projects to help elderly people to maintain a level of independence". Either befriending, exercise classes or social events
Project	Woodroffe Benton https://www.woodroffebenton.org.uk/	£500- £2500	31 st March 2021	Apply in March	For smaller UK registered charities working to 'improve the quality of life and social engagement for older people'
Capital	SHBC Ward Councilor Fund https://www.surreyheath.gov.uk/community/grants-and-funding/ward-councillor-community-fund-grant-scheme	£500	No deadline	Find local ward councilor and ask for support	Capital purchases Café needs branded barriers for the outside area and new signage – ask Community Café manager for details of any equipment she might need

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Core	Garfield Weston https://garfieldweston.org/	No more than 10% of annual running costs	Rolling deadline	Apply when reserves show as fairly low as they refuse if unrestricted reserves too high	<p>You can apply for salary costs as part of a core funding bid but just a contribution to overall salary costs rather than funding a specific role.</p> <p>They like simple core funding bids from small charities, than can include a portion of salary costs- can be over 1,2 or 3 years.</p> <p>Worth looking at if the National Lottery bid is refused or once it starts to run out</p>
Project or equipment	Barchester Charitable Foundation https://www.bhcfoundation.org.uk/apply	£100 to £2500	Rolling deadline	Apply when you have a suitable project	<p>https://www.bhcfoundation.org.uk/</p> <p>They fund "activity projects, equipment and for use by members, member transport, day trips and outings". Perhaps fund a day out in the summer, or T&M or exercise classes.</p> <p>Better to apply when you have lower reserves as lots of competition for this fund</p>
LONGER DEADLINES					
Project	McCarthy Stone Foundation https://mccarthystonefoundation.org/our-grant-programmes/	Not specified	Fund opening in the Spring		<p>McCarthy Stone Foundation Awards opens for applications in Spring 2024. The focus is on organisations offering befriending and companionship to older people on a 1-1 basis.</p> <p>Suggest applying for funding for the befriending project.</p> <p>To find out more, please sign up for our information webinar at this link Get a Grant – funding with the McCarthy Stone Foundation in 2024 Tickets, Thu 15 Feb 2024 at 11:00 Eventbrite</p> <p>https://mccarthystonefoundation.org/our-grant-programmes/</p>

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LONGER DEADLINES					
Depends on theme	Magic Little Grants https://localgiving.org/magic-little-grants/	£500	Can apply at any time when the fund is open	Waiting for 2024 round to open	Sign up to Local Giving mailing list for updates regarding the fund theme and opening dates. Only a small amount but a 20-minute form and quick response within 6 weeks
Projects	W.G Edwards Charitable Foundation W.G.Edwards Charitable Foundation (wgedwardscharitablefoundation.org.uk)	£1000-£3000	Send in early May for the July trustee meeting	Apply after 1st May 2024 - see details on website	Funding for innovative projects for the over 65s such as lunch clubs, gardening projects, daytrips, IT classes for older people and fitness classes
Projects	Skipton Building Society https://www.skiptoncharitablefoundation.co.uk/?dm_i=6MG6,XDWQ,57YQWK,48QX1,1	Up to £6k	Deadline 1 st May 2024 (1 st of the month before trustee meetings- March, June, Sept and Dec)	Just missed February deadline so apply in April	Charity fits into: "support the elderly and improve their wellbeing by reducing isolation." Skipton will not fund salaries, so could ask for volunteer expenses for befriending scheme (DBS, thank you event costs, travel costs) or the seated exercise classes

 **Notes:** You can apply to National Lottery for more than one grant so try Awards for All if Reaching Communities