



# HALIFAX FOUNDATION

for Northern Ireland

## A VISION FOR THE FUTURE

### OUR STRATEGY 2020-2023

*“supporting people who need us most”*

Halifax Foundation NI exists to support charities within Northern Ireland, enabling people who are disadvantaged or with additional needs, to participate actively in their communities.

The Foundation have been supporting disadvantaged groups since **1985**, funding over **10,500** projects to the tune of **£37.5M**. This would not have been possible without the support of Lloyds Banking Group, our sole donor.

We are delighted to launch our strategy for 2020 - 2023, **‘A Vision for the Future’**. Based on research we carried out in the Third Sector - with non-profit organisations, recently funded groups and umbrella organisations supporting the community and voluntary sector, our Strategy will see the creation of four new grants programmes. Grant programmes have been streamlined to ensure charities can spend more time delivering their essential work, rather than completing lengthy application forms.



**Transparency, Integrity, Accountability & Quality**

## SMALL COMMUNITY GRANTS

- Up to £2,500
- 12 month grant
- Rolling programme
- Maximum 4 month turnaround for decision
- Funding to improve the lives of those who are disadvantaged and/or disabled
- Aimed at charities with an income of under £1M
- Evaluated after 12 months



## MEDIUM COMMUNITY GRANTS

- £2,500 - £10,000
- 12 month grant
- Rolling programme
- Maximum 4 month turnaround for decision
- Funding to improve the lives of those who are disadvantaged and/or disabled
- Aimed at charities with an income of under £1M
- Evaluated after 12 months



## LONG TERM COMMUNITY GRANTS

- Up to £50,000
- Over 3 years
- Programme opening in January, closing in February each year
- 'Grants Plus' approach
- Funding to improve the lives of those who are disadvantaged and/or disabled
- Monitored annually
- Aimed at charities with an income of under £1M



All grant programmes will consider core costs, salaries, programme costs, activities/trips and equipment, volunteer expenses, training, transport and disabled access (this list is not exhaustive).

## SPECIAL INITIATIVES

- Aimed at supporting the Third Sector
- Strategic in nature
- NI Wide potential
- Up to £20,000
- 2 years



## ADVICE

Our team of highly experienced Grants Officers are on hand to advise you. To arrange a pre-application meeting, simply contact the office on 028 9032 3000.

## MAKING THE CONNECTION

It is vital to us that we connect with you, and support you in selling your project in the best way you can. Each applicant will receive a telephone call from their Grants Officer, giving you a chance to explain your project in more detail.

## GOOD GOVERNANCE

We are advocates of good governance and realise our role in supporting charities to be as successful and sustainable as they can be.

## DIGITAL SUPPORT

We offer grant recipients the opportunity to apply for a laptop, pc or tablet to support administration via Computer Recyclers UK.

## ONE TO ONE FINANCIAL MANAGEMENT SUPPORT

In partnership with Tony Clarke Accountants, we offer support to make financial procedures more efficient and effective.

## CHARITY MENTORING PROGRAMME

We can connect you with a skilled Lloyds Banking Group staff member to act as a mentor, gifting their time to challenge and foster personal and professional growth.



## IS YOUR GROUP ELIGIBLE TO APPLY?

- Registered Charity with HMRC and/or Charity Commission NI
- Beneficiaries of Charity reside in NI
- Income of Charity under £1 Million
- Charity supports those who are considered disadvantaged and/or with disabilities
- Charity has a set of independently examined accounts
- Charity has a Board of Trustees, with minimum number of Trustees (as per governing document)
- All relevant policies are up-to-date and reviewed periodically

## OUTSIDE OUR REMIT

- Individuals and students
- Business loans and finance
- Endowment funds
- Organisations that are insolvent
- Sponsorship or fundraising events
- The environment
- Activities that are normally the responsibility of local/central government
- Animal welfare
- Umbrella organisations
- Capital Builds (except in case of disabled access)
- Travel outside of Northern Ireland
- Promotion of religion
- Hospitals and medical centres
- Schools and universities (except for projects to benefit pupils with special needs)
- Charities with more than 12 months reserves would not be seen as a priority



## CONTACT DETAILS

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