



# Better Together

Our Strategy for 2024-2028

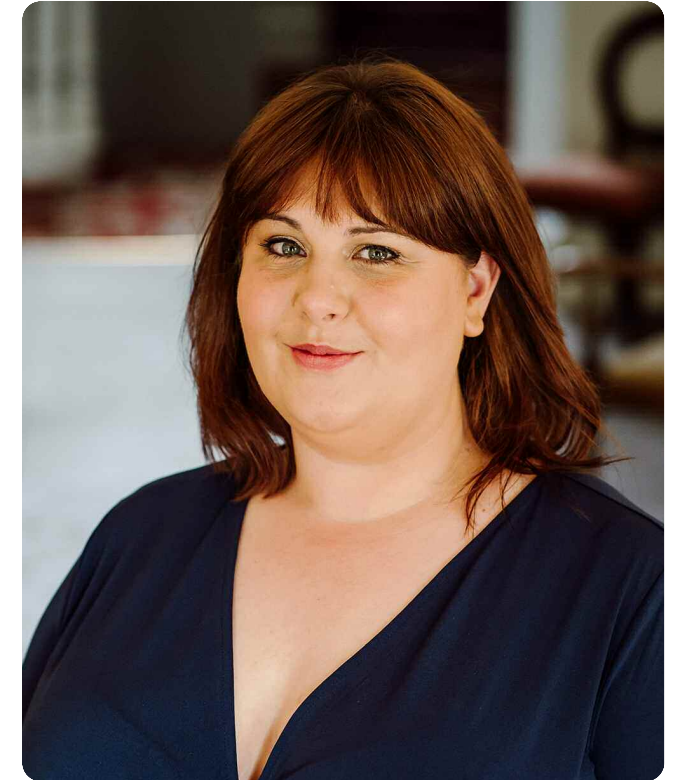
# Foreword from our Chair

Within a few months of launching our previous strategy, the COVID-19 pandemic took hold. True to our commitment to being a responsive funder, we quickly adapted to meet the needs of the community – supporting charities in local communities to reach people in greatest need on their doorsteps.

We are immensely proud of how the voluntary and community sector responded to the crisis, and our ability to be by their side as they adapted to meet complex and changing needs.

But further challenges were to come in 2021/2022 in the form of the cost of living crisis, the outworking's of Brexit and further political instability. Considering the current climate, we are delighted to launch our new 5-year strategy "Better Together."

This strategy will see us strengthen our partnership with our sole funder, Lloyds Banking Group, collaborating to make positive change by offering a suite of exciting new grant programmes in direct response to the needs of our applicants. My thanks goes to all of our invaluable Trustees who give unstintingly of their time and expertise to respond to the needs of the voluntary and community sector and for their dedication in paving the road ahead for the Foundation to deliver this future strategy. We are committed to investing in local charities and empowering communities in greatest need to flourish.



**Gillian Boyd**

# Who we are?

The Halifax Foundation for Northern Ireland is one of four independent grant-making trusts, covering England & Wales, Scotland, Northern Ireland and the Channel Islands. We are funded by the profits of Lloyds Banking Group and together receive 0.5% of the Group's pre-tax profits. The Foundation is independent of the Group. It's policies are determined by a Board of trustees.

**Our purpose is to Invest in local charities, empowering communities in greatest need to flourish.**



# Our Values

## WE NURTURE

We enable local charities to develop and enhance their ability to respond to community needs. We support each other to deliver beyond what is expected.



## WE ARE RESPONSIVE

We listen and adapt our programmes in response to community need.



## WE ARE PASSIONATE

We believe deeply in our vision and work tirelessly to support communities in greatest need.

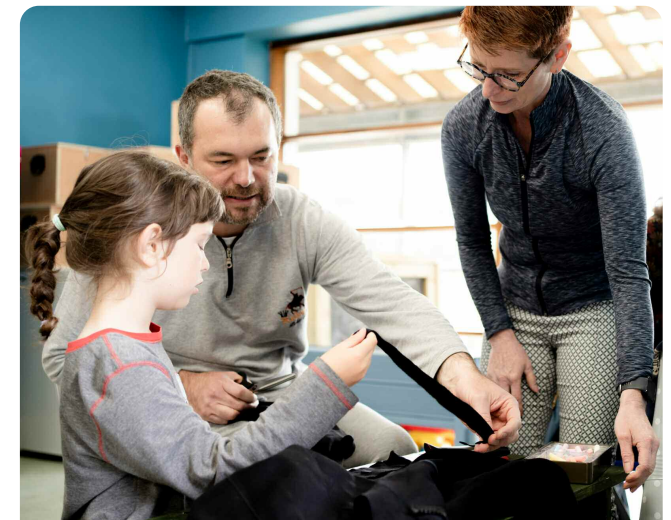
## WE ACT WITH INTEGRITY

We are open, transparent and honest with our applicants and with each other.



# Our Strategic Objectives

1. To provide grants and other enabling support to local charities, responding to the needs of the communities they serve.
2. To collaborate with others and to encourage those we work with and support to collaborate, so as to maximise the reach and impact of the resources available.
3. To strengthen our partnership with the Lloyds Banking Group, utilising fully the resources available through it, and also seeking to secure long term sustainability for the Foundation.
4. To maintain robust organisational governance and continue to enhance and optimise grant giving processes.



# Our Vision

**Our vision is of a sustainable and inclusive Northern Ireland where everyone thrives.**



# Our Grant Strategy 2024-2028

As part of our new Strategy, 'Better Together', we have designed a suite of new grant programmes to enable our applicants to help those in greatest need.

<h3>IGNITE</h3> <p>Open to groups who have been recently set up (within last 2 years) who are registered charities</p> <p>.....</p> <p>Seeding support of up to £2,000 to kick-start charity</p> <p>.....</p> <p>Examples of costs may include core support, equipment, research</p> <p>.....</p> <p>Mentoring and governance support available.</p> <p>.....</p> <p><b>OPEN FOR APPLICATIONS FROM JANUARY 2024</b></p>	<h3>Community FLEX</h3> <p>Open to charities with an income of £500,000 or less, with at least one year of annual returns published on CCNI website</p> <p>.....</p> <p>1-year grants of up to £10,000</p> <p>.....</p> <p>Examples of costs may include core, salary, equipment, project costs</p> <p>.....</p> <p>Rolling grants programme</p> <p>.....</p> <p><b>OPEN FOR APPLICATIONS FROM JANUARY 2024</b></p>	<h3>COLLABORATE</h3> <p>Open to 2 or more charities coming together for the first time to tackle a social issue at a local level.</p> <p>All charities must have individual income levels of £500,000 or less</p> <p>.....</p> <p>1-year grants of up to £20,000</p> <p>.....</p> <p>Collaboration training available</p> <p>.....</p> <p>Examples of costs include core, salary, training, equipment, research</p> <p>.....</p> <p><b>OPEN FOR APPLICATIONS FROM JANUARY 2024</b></p>	<h3>EMPOWER</h3> <p>Open to infrastructure charities, both regional and sub-regional who provide guidance and support to voluntary &amp; community groups</p> <p>.....</p> <p>1 to 2 year funding available totaling £20,000</p> <p>.....</p> <p>Projects must be strategic in nature</p> <p>.....</p> <p>Examples of costs may include research, publications, capacity building training</p> <p>.....</p> <p><b>OPEN FOR APPLICATIONS FROM JUNE 2024</b></p>	<h3>40 INVEST</h3> <p>Open to charities with an income of £250,000 or less. Support package includes mentoring, governance and financial management help</p> <p>.....</p> <p>2 year funding available totaling £40,000</p> <p>.....</p> <p>Examples of costs that may be supported include core, salary, project costs</p> <p>.....</p> <p>Capacity building support available</p> <p>.....</p> <p><b>OPEN FOR APPLICATIONS FROM SEPTEMBER 2024</b></p>
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# Our Pledge

Halifax Foundation for Northern Ireland are committed to being a flexible funder. As such, we have signed up to be an 'Open and Trusting' grant maker, an initiative developed by IVAR (Institute of Voluntary Action Research). We pledge to:

## Be open

If, during the assessment process we are sure that a project will not be funded, we will be upfront with applicants. We will give them the opportunity to withdraw their application and resubmit a new application immediately where we can. If we have to decline an application, we will tell our applicants why and give them an opportunity to discuss this with us.

## Communicate with purpose

We will continue to build personal relationships and maintain open communication channels throughout the assessment, project delivery and evaluation stages, whereby all applicants feel empowered to raise queries or concerns.

## Act with urgency

We have reduced our decision-making time from 16 weeks to 10 weeks, with the average turnaround time from submission to decision being 6 weeks. Our Grants Committee now meet twice as often than pre-pandemic times.

## Accept risk

We recognise the financial challenges facing charities today. We will therefore not decline applications on the basis of low reserves if the applicant has a plan in place to support ongoing viability. We will give initial payments in order to facilitate cashflow for successful applicants.

## Enable flexibility

We will give applicants space to adapt by making it simple to reprofile budgets and extend budgets where required. We will continue to provide applicants with the opportunity to apply for funding to cover core costs, overheads and/or salaries.

## Be proportionate

We are committed to only asking questions that we need the answer to in order to make funding decisions and evaluate the impact of our support. We will continue to take a trusting and light touch approach to project monitoring and will seek applicant feedback on our reporting requirements.

## Not waste time

We will give applicants an opportunity to discuss their needs pre-application through one to one and group sessions. We will ensure our funding criteria is clearly presented on our website and ask for feedback on how to improve.

## Ask the relevant questions

We will keep our application forms as short as possible, only asking you questions that we need to reach a decision. We will continuously review this and make improvements where we can.

# A note from our CEO

As our current strategy (2020-2023) comes to a close and I look back on what the voluntary and community sector has had to endure over the past few years, I am filled with pride at their resilience and ability to meet the changing needs of communities throughout Northern Ireland.

Embarking on a new 5-year strategy, consultation with our grant recipients was central to how we shaped our future grant giving. We sought feedback from them on how we can minimise bureaucracy and be flexible to support charities as they navigate the ever-changing environment.

Responding to what the Sector has told us, we will continue to provide flexible core support throughout all future grant programmes. To celebrate 40 years of grant giving in Northern Ireland, we will also launch a multi-year funding stream to kick off in January 2025, as we recognise the need for continuity and stability.

Our new suite of grant programmes will also see the creation of a fund for new charities as well as increased awards for more established charities. We know that our vital infrastructure organisations need support to be transformational and as such we will continue to provide funding to groups who work tirelessly to support the voluntary and community sector.

Lastly, to encourage and reward collaboration, we have set aside funds to pilot the creation of a fund that will support two or more charities coming together to tackle a social issue at a local level.

Due to the sheer volume of applications coming through for support, we have had to make difficult decisions. One such decision is the change to eligibility criteria that will see the reduction in the income level of charities that can apply to us for support from £1million to £500,000. Whilst we realise that some charities providing vital services might be disappointed, we are committed to keeping our criteria under constant review.

We will continue to work closely with our sole donor, Lloyds Banking Group who share our passion to build the capacity of communities throughout Northern Ireland. Therefore, we will continue to offer mentoring, leadership, communications and governance support provided through our partnership with the bank. We will act with integrity and passion. We will be responsive and nurture all who come into contact with us. **We believe we are truly Better Together.**



**Brenda McMullan**



**Halifax Foundation for Northern Ireland**

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