

## **CAF Resilience programme Guidance to applicants**

### **1. What's the vision?**

Small and medium-sized charities are a crucial part of the fabric of UK society. They are flexible, passionate, a force for local cohesion and are close to their cause. Many deliver effective outcomes day after day around society's most difficult issues.

The turbulent economic climate and reductions in government spending mean that many charities are struggling to raise the money needed to stay afloat and meet increasing demand for their services. Faced with these challenges, organisations can tend to prioritise the immediate need by focusing on service delivery, but have limited capacity to step back and think about how to secure a healthy future.

At Charities Aid Foundation (CAF), our mission is to encourage society to give ever more effectively. We've created a three year pilot initiative called the **CAF Resilience** programme to boost charity resilience and encourage giving by individuals and companies that supports this goal. We're uniquely placed to do this as we work with both charities, and major donors and companies who rely on us for advice to achieve greater impact around their philanthropic giving.

### **2. About the programme**

CAF Resilience is a new grant making programme, designed to boost resilience and help charities to strengthen their infrastructure. CAF will support ten small to medium-sized charitable organisations with entirely bespoke support for their needs. This could include expert advice and guidance on key issues such as governance, strategy development, financial planning, sustainable sources of funding, demonstrating impact and communicating effectiveness.

Over the course of the programme, we'll learn lessons for the wider sector, communicate best practice and, crucially, seek to encourage more philanthropic giving to smaller charities, in a similar way, by other major donors.

We are seeking applications from charities that meet genuine needs and are highly effective at delivering change in their field, but which need support to become more resilient and to adapt to a changing environment, in order to continue to deliver their services. We want to encourage more philanthropists to support smaller charities to plan for the longer term, rather than simply pay them to deliver services. This pilot programme is designed to make that case.

### **3. What do we mean by resilience?**

We regard a resilient charity as one with capacity to recover quickly from setbacks and to adapt to the changing environment in which it operates. It means an organisation is not only having an impact on the cause it advances, but also has a plan in place to continue doing so in the future.

### **4. Who we are**

CAF is a charity dedicated to making philanthropy more effective and helping charities be more successful. We're trusted to manage nearly £3 billion on behalf of charities and donors worldwide, and pass more than £450 million to charities each year, transforming lives and communities around the world.

We work with a wide range of small and medium-sized charities, providing services for their funding, finance and strategic advice needs.

### **5. Who you are**

- You must be a charity registered with the Charity Commission, the Charity Commission for Northern Ireland or the Office of the Scottish Charity Regulator; or a Community Interest Company (CIC) registered with Companies House;
- Your organisation must have an annual income between £250,000 and £1.5 million. Please note that we will give priority to those with an annual income of under £1 million;
- 50% or more of your organisation's beneficiaries must be located within the UK;
- Your organisation must be able to demonstrate a focus on preventing problems occurring or reoccurring, through early action, as opposed to addressing the consequences of an issue; and
- Your organisation must have been delivering your services in the UK for over two years.

Whilst we recognise the role of religion and belief in motivating social action, CAF as an organisation is politically neutral and is not aligned to any religious perspective. For this particular programme we will give priority to organisations who can demonstrate that they:

- address a social issue;
- serve all sections of society regardless of their religious or political belief; and
- do not promote political or religious viewpoints to their beneficiaries

If you are unsure whether your organisation fulfils the eligibility criteria, please contact Beth Williams, by phone: +44 (0)3000 123 275, or email: [bwilliams@cafonline.org](mailto:bwilliams@cafonline.org)

## 6. How we could work together

We want to work with ten small to medium-sized organisations, for up to two years, to help them build their resilience. Here's how the programme will work.

### a) CAF will provide:

- A grant (refer to section 6b) to allow your organisation to take part in the programme of up to £50,000 per year;
- Help to identify within which areas you need support to develop your organisation and enhance its resilience;
- Free expert advice to support you to improve in these areas. This will vary for each organisation but could include training, facilitated workshops, desktop research on your behalf or a consultant to work with you on developing your strategy;
- Access to carefully selected partner organisations, who will provide training on relevant subjects such as gathering and using stakeholder feedback, crowdfunding and engaging with local companies;
- The opportunity to network with other charities on the programme and to learn from each other; and
- Support to communicate your value and impact to donors and supporters.

### b) CAF won't provide:

- Unlimited, unrestricted funding. We will talk with you during the application process to understand your challenges and needs and will agree the amount of support you will receive and how you propose to invest it. It is not restricted funding as we will trust your organisation to know how best to use it, but we will expect you to follow our agreement. Any significant variation must be approved before making any expenditure;
- Funding for new programmes or ventures. The programme's grant funding is designed to release the time of your key personnel, in order that they can spend two years focusing on moving the organisation into a really strong position for the future;
- We won't match you to individual donors, but there will be opportunities throughout the programme to meet philanthropists and to talk about your work.

## 7. You will need:

- Willingness to engage fully with the opportunity and enthusiasm to embrace the opportunity to change;
- A learning mentality with a commitment to actively participate in a programme designed to support the whole sector and encourage more donors to give to smaller charities;
- Buy-in and commitment to this programme at both Trustee and senior management level. This is absolutely essential;

- A minimum of two paid staff members, one of whom is ideally in a full-time leadership position;
- At least two people who will commit regular time to this programme. One will ideally be a full-time staff member and the other may be a Trustee or volunteer. Both will need to be able to commit time to this programme for the full two years; and
- To be able to demonstrate sufficient financial stability to engage in the programme.

## 8. Timetable

Step 1	Talk to your management team, and ideally your board, to ensure this programme is right for your organisation	
Step 2	Submit your application. You'll receive an email to confirm that we have received it.	Before 2pm on Friday 10 February 2017
	If you are unsuccessful at this stage we will email you to let you know.	By mid March 2017
Step 3	<p>We will get in touch with organisations that look like a good fit for the programme. We'll arrange a meeting (or call if that isn't possible) to meet the Chief Exec and a Trustee of your organisation, ideally the Chairperson. We'll want to talk further about the information provided on the application and within the supporting documentation and generally explore how the organisation would use the opportunity.</p> <p>Organisations will be asked to provide documentation and a reference from another charity they have worked with and these will be required within the week. Detailed information will be provided at the time.</p>	We expect to get in touch mid-March to arrange a meeting between 27 March and 13 April 2017
Step 4	Following the meetings and with the input of our independent advisory board we will review and select the ten organisations to be accepted onto the programme. We'll get in touch with all of them to confirm our decision. The successful organisations will be sent an agreement to sign and return, setting out your obligations to us and ours to you.	Mid April
Step 5	Five charities will start the programme in June 2017 with the further five joining later in the year.	

## **9. Application criteria**

We can only enrol ten organisations onto the programme and we are looking for a range of themes, sizes and locations (within the boundaries of the eligibility criteria). Please don't be too disappointed if we can't take your application forward. We plan to stay in touch with all applicants to keep them informed of other opportunities within CAF that may benefit them, but we expect the CAF Resilience programme to be a competitive selection process.

Please note that the final decision is in our sole discretion. Should your organisation be successful, our relationship with you will be subject to formal terms and conditions.

If your organisation is interested, you can apply at:

[www.cafonline.org/CAFresilience](http://www.cafonline.org/CAFresilience)

## **10. Any questions?**

First, please take a look at our [FAQs](#).

If you still have questions about your application or need more information, call Beth Williams on +44 (0)3000 123 275 or by email: [bwilliams@cafonline.org](mailto:bwilliams@cafonline.org)

## **11. Application deadline**

Applications will only be accepted until **2pm on Friday 10 February 2017**.