

Capability Support: A programme of specialist strategic support for community-led organisations, working with older people.

Guidelines for applicants 2021



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1. INTRODUCTION

1.1 OVERVIEW

In November 2020, we published our priorities for the next five years in a [our strategic framework](#).

One of the mechanisms through which we aim to deliver our objectives is by providing targeted funding to community-led organisations to enable them to develop their organisational capabilities, for example, in developing financial sustainability, impact evaluation or a strategy for revenue generation.

Given the challenges of the last year, it has become apparent that there is a need for community organisations to access support in helping them to evaluate and communicate the impact of their work, and linked to that, developing financial sustainability.

To date we have made funding available to our existing grant holders to help them with their capability-building needs and made introductions to a number of specialist organisations. The scheme has been well-used and we now wish to widen it by offering the opportunity for all eligible community-led organisations working with older people to access tailored programmes of capability-building support, through our chosen partner, Moore Kingston Smith who specialise in developing financial sustainability and evaluating impact.

1.2 MOORE KINGSTON SMITH



ABOUT MOORE KINGSTON SMITH FUNDRAISING AND MANAGEMENT (MKSFM)

MKSFM is a small, highly experienced team that has helped hundreds of non-profit organisations become better at what they do best: creating positive change. They appreciate that every organisation is different and through combined expertise in financial systems, impact measurement and business modelling, offer a bespoke and wraparound service to support organisational development.

MKSFM's team have years of experience of working in charities in a wide range of sectors. The key services offered by their advisors are: impact measurement, fundraising strategy, financial sustainability and knowledge and strategy.

MKSFM are part of Moore Kingston Smith LLP, which is one of the top 20 accountancy and audit firms in the UK, and one of the few jointly-registered legal firms in the country. They have been voted top firm for overall service in the Charity Finance 2020/21 Audit Survey, out of the leading top 10 charity specialist firms in England – an accolade they have now attained for the last six years in a row.

MKSFM's delivery experience

The team has a wide range of delivery experience across a multitude of sectors and types of organisation. Below is a taste of some of their experience to date:



MKSFM conducted an in-depth strategy review of the Whittington Hospital Charitable Funds’ fundraising potential and developed an action plan to help its fundraisers implement.

“MKSFM helped us take stock of our fundraising activities and create the best strategy to help us grow.”

Juliette Marshall, Director of Communications, Engagement and Fundraising

Whittington Health

“We thoroughly enjoyed working with the MKS impact team to measure the impact of some of our community services. Their social impact analysis helped us define our effectiveness, plan future work and provide evidence to our commissioners. It also attracted widespread media interest. We are delighted to continue to work with MKS to assess the impact of a new telephone lifeline service we implemented during the Coronavirus pandemic.”

Bruce Leeke, CEO

Suffolk Libraries

“The cost recovery and business model work has helped immensely in negotiating with local authorities for sustainable levels of funding. It has given absolute clarity and transparency of the cost presentation. Your work has been exactly what we wanted – so very helpful.”

Dolyanna Mordochai, CEO

Resources for Autism

2. ELIGIBILITY CRITERIA

2.1 WHO CAN APPLY?

UK-based community organisations* working with older people, who are seeking support with organisational strategy, sustainability and impact assessment.

Applications from large national charities (i.e. those with an annual income in excess of £10m or with £100m+ of assets) will NOT be eligible for support.

* By ‘community organisation’ we mean any third sector organisation with a local and/or community focus providing services and support to older people (where at least 75% of the beneficiaries are over 60 years of age).

2.2 PROGRAMME OF SUPPORT

The MKSFM team will provide a flexible service to each applicant organisation over a 9–12-month period. This will entail:

- the provision of bespoke and specialist support following diagnosis of the main organisational requirement;
- dedicated follow-on support to direct progress towards change;
- access to a team of wide group of specialists in 3 distinct areas;
- a mentoring process with a clear action plan to achieve change that is needed for that organisation;
- direct consulting support if needed to provide resource;

- any additional recommendations to ensure progress.

The nature of the support provided will depend on organisational needs, but could include aspects of the following:

- an objective review of existing modes of operation or business model;
- an opportunity to integrate impact measurement into their organisation that will help to inform future considerations of funding and service delivery (including opportunities to use impact data to define required resource levels and assess how outcomes might be achieved more efficiently);
- ensuring that the case for support is clearly articulated and chances of effective income generation are maximised;
- access to a critique on current funding bids;
- access to diagnostic financial tools enabling the charity to consider their current business model and facilitating the consideration of (sometimes competing) priorities on impact, income and service delivery for the future;
- access to cost recovery support;
- an opportunity to increase the effectiveness of management reporting of the true financial standing of the charity;
- action planning for future management decisions on increasing resilience and maintaining delivery to client base during challenging times.

2.3 ASSESSMENT CRITERIA

- Shortlisted applicants will be invited to participate in a shortened version of MKSFM's 360 diagnostic tool. This will help determine the support needed. The diagnostic tool is a set of questions about nine areas of organisational capability including strategy development, governance, impact and finance. Applicant organisations will be scored on elements within these areas, in order to identify key strengths and priorities for development.
- The diagnostic phase will be delivered in one of three time slots:
 - Phase one: November 2021 – January 2022
 - Phase two: February 2022 – April 2022
 - Phase three: May 2022 – July 2022

Applicants will be asked to indicate their preferred time slot. We will do our best to allocate the preferred slot, but this will be dependent on demand and may need to be adjusted. We may run a further shortlisting processes if demand is high.

Successful applicants:

- will be invited to go on to complete the full 360 diagnostic tool which will be used to explore in more detail the support required as a first step on the programme;
- a member of the MKSFM team will then work with the organisation to determine and deliver the support package.

Unsuccessful applicants:

- will be provided with the findings of the shortened 360 diagnostic tool so that they can gain a better understanding of the support they need;
- will be signposted to further assistance.

2.4 COHORT APPROACH AND SHARED LEARNING

Collaboration and shared learning are key principles of our strategic framework. Where we identify areas of common interest, we aim to create cohorts of peers and facilitate peer support, as appropriate.

Both MKSFM and DMT are learning organisations. We will therefore be evaluating this funding programme, which will involve a light touch assessment at the start and at the end of the programme to capture the journey of each organisation which we intend to share more widely.

2.5 AMOUNT AVAILABLE

Funding will be provided directly to MKSFM. Those participating will, however, receive a grant offer letter detailing the total cost of the support package so that it can be recorded as in-kind support.

3. APPLICATION PROCESS AND TIMELINE

The application process for this call will follow the timetable below:

Activity	Date
Scheme opens to applications	14 July 2021
Application deadline	20 September 2021 (5pm)
Applicants notified of the outcome of shortlisting	27 September 2021
Shortlisted applicants given access and support for the diagnostic tool over one of three phases	
Phase one:	November 2021 – January 2022
Phase two:	February 2022 – April 2022
Phase three:	May 2022– July 2022
We reserve the right to change the phasing of work and its delivery during the engagement, depending on demand and capacity to meet needs.	

4. SUBMITTING AN APPLICATION

The scheme will open on 14th July 2021 and close at 5pm on 20th September 2021. To apply, you are required to complete an online application form.

BEFORE STARTING AN APPLICATION

Please ensure that you have completed our eligibility questionnaire and read our funding FAQs, both of which can be found on the “[Apply for funding](#)” page of our website. You should also read our [Terms and Conditions](#).

Application forms need to be submitted via our [online Grants Management Portal](#). Please [follow this link for a separate “how to” document](#) with details on registering for an account and using the portal.

You can download a [blank PDF version of the application form from our website](#). Please note, however, that this is only provided to help you plan your application – only submissions made via the Grants Management Portal before the deadline will be accepted.

5. SUPPORT AND FURTHER INFORMATION

5.1 SUPPORT DOCUMENTS

- Visit our “[Apply for funding](#)” page to see our general funding FAQ’s.
- Read our [Terms and conditions for community grants](#).
- For guidance on navigating and using the Grants Management Portal, please see our “[how to](#)” [guide](#)
- For the template application form please [follow this link](#)

5.2 CONTACT INFORMATION

If you have any queries regarding this scheme, including if you need any alternative accessible formats at any stage of the application process, please contact sarah.allport@dunhillmedical.org.uk. We will do our very best to assist you.