

# Aged Veterans' Fund

## Expressions of Interest Guidance

### The Aged Veterans' Fund

HM Treasury has allocated £25 million to the Aged Veterans' Fund. After the first year's commitments, we now have £18 million left to commit. It is to fund projects aimed specifically at supporting older veterans who may require additional support in health and social care. This guidance should be read in conjunction with the expression of interest form for the Aged Veterans' Fund.

### Background

Funding will be made available to support the non-core health, wellbeing and social care needs of veterans born before 1 January 1950 and who are residing permanently in the UK. This includes surviving World War 2 veterans, those who undertook National Service and other voluntary enlisted veterans who may need some focussed support. Families and carers may indirectly benefit from the projects, but no individual or their descendants may receive any cash benefit.

Grants of up to £5,000,000 will be made available to lead organisations who will manage, support and ensure the delivery of a **strategic portfolio of projects run by other organisations** (and themselves in some cases) across regions and nationally. These portfolios may last up to three years.

Applications would be welcomed for the provision of practical support and companionship to these veterans to improve their wellbeing. This would include areas such as the provision of services to assist individuals in the completion of personal paperwork; projects to build or enhance access to centres where elderly veterans can meet and avoid the isolation often felt by individuals in this age group.

We want projects which are broadly accessible, as well as those that are targeted at the oldest and most infirm, who have clear support physical and emotional needs to live independently and avoid isolation.

In the first year of the Aged Veterans' Fund we funded some individual projects. This year we are only planning to fund portfolio applications.

### The key criteria

We will assess whether your project fits with what the Aged Veterans' Fund is all about. One of the main considerations for the assessment team and decision makers will be evidence of the coordination of bids, which will enable the Aged Veterans' Fund to have a real impact and to avoid funding competing or conflicting applications.

We want to fund projects which have a real and lasting impact on the quality of life of older veterans; which benefit them and support them with their non-core health, wellbeing and social care needs. Families and carers may also benefit from the projects indirectly.

There is a two stage application process for the Aged Veterans' Fund; the expression of interest form is the first stage. If your project is one we invite to stage two, you will be asked to complete a full application form.

At **stage one** - the expression of interest - the main assessment criteria are:

- ✓ how well the overall project addresses the aims of the Aged Veterans' Fund
- ✓ the ability to demonstrate an excellent understanding of the needs of older veterans
- ✓ the ability to work in partnership
- ✓ the blend and strength of the portfolio of projects
- ✓ the capacity to manage large multi-faceted programmes of work
- ✓ ability to identify, reach and engage with older veterans

At **stage two** - the full application - the main assessment criteria are:

- ✓ how well the overall project, and the portfolio projects, are likely to be delivered
- ✓ the ability to demonstrate that the portfolio projects are clearly additional to, and complement other initiatives in the sector, for example government social care initiatives
- ✓ how well the portfolio will achieve coordinated outcomes across a portfolio of projects
- ✓ to what extent the project represents value for money
- ✓ to what extent we can have confidence that the project will have lasting impact, delivering changes that last beyond the funding period

Please note also that:

- we cannot fund a service that is or should be provided by others (for example, by Government Departments or local authorities)
- projects must not generate a profit, top-up an existing Grant-in-Aid or raise funds for the charitable sector
- this fund can only provide one off funding so where there is an ongoing cost – such as maintenance or staff costs, we will look for clear and realistic plans for future funding

## Who can apply?

We are particularly keen to see portfolio applications from organisations that have a good track record of managing similar strategic partnership projects across regions and nationally.

**By 'portfolio' we mean a linked collection of projects coordinated by the lead organisation and provided by suitable partner organisations. The lead organisation will be responsible for ensuring that the projects are successful and that the sum of the whole is greater than the sum of the parts.**

The lead partner must be a registered charity with a track record of managing large strategic projects, and capacity to manage and coordinate the provision of the proposed portfolio. Whilst expertise in the subject area and in engaging with the beneficiaries is essential to the make up of the portfolio partners, it is important that lead organisations can demonstrate this expertise as well.

Eligibility to be a portfolio partner is not limited to the charitable sector, but all projects must be able to show that they are operating not for profit models.

## Who cannot apply?

Individuals cannot apply and cannot be a partner organisation.

Unincorporated organisations which are not registered as charities cannot apply. If they have been properly constituted under an adopted governing document and have been operating under that governing document for at least three years then they can be a partner.

As partnerships and some forms of social enterprise are not registered charities or Community Interest Companies, they cannot apply but they can work as a partner with an eligible lead applicant.

## What can you apply for?

Grants of up to £5,000,000 are available this year.

If you are seeking more than £1,000,000 you must contact us – giving a brief two paragraph outline of your proposal – at [Covenant-GrantTeamMailbox@mod.uk](mailto:Covenant-GrantTeamMailbox@mod.uk) to ensure that you strongly meet the application criteria before applying. If you do not contact us it is highly likely your project will be rejected at the Expression of Interest stage.

You should list the individual projects in your portfolio in priority order as the National Panel may wish to part fund your project.

## What will we pay for?

We can pay for most of the things you'll need for your project whether it's people's time, buying or hiring equipment, or minor improvements to land or buildings.

There are a number of things **we can't pay for** either because they are not in the spirit of the Aged Veterans' Fund, or because of relevant legislation or tax rules.

These include:

- Cash benefit to individuals or their descendants
- Topping up existing grants and aids from another Government Department
- Repeat or regular projects that require a source of uncommitted funding
- Investments
- Paying for ongoing costs of existing partnership activity
- Organisational fundraising activities
- Endowments (to provide a source of income)
- Projects, activities or services that the state has a legal obligation to provide
- Retrospective funding for projects that have already taken place
- Excessive contingency costs; management or professional fees

This is not an exhaustive list as we feel it is more useful to focus on what you are trying to achieve and how you are going about this than to issue long lists of eligible and ineligible costs.

If your project strongly addresses one of the funding priorities; the spirit of the Aged Veterans' Fund and the criteria set out in this guidance, your costs should be eligible. You can find further information about eligible costs in the Frequently Asked Questions on our website.

## When to apply

There is a two stage application process for the Aged Veterans' Fund. The first stage is an expression of interest form which will be published on our [website](#). If your project is one we invite to stage two, you will be asked to complete a full application form.

## Stage one, expressions of interest

The deadline for expressions of interest this year is:

- Noon on **Friday 1 July 2016**

You can submit your expression of interest before this date but our assessment and decision making dates are fixed, so that we can consider applications' relative merits together, and therefore we will not be able to give you a decision any sooner.

If you send your expression of interest to us after the deadline we will not be able to accept it.

Do check that you have fully answered all the questions. If you have not, we might not be able to consider your expression of interest.

If you have any questions about completing the expression of interest form then please contact us at [COVENANT-GrantTeamMailbox@mod.uk](mailto:COVENANT-GrantTeamMailbox@mod.uk)

## After you submit your expression of interest

We will check your expression of interest to ensure that you have provided all the information we have requested. We will conduct an eligibility check within ten working days of the deadline for the receipt of expression of interest form. If your expression of interest is not eligible, we will not be able to process it any further and it will not be considered for funding. If your expression of interest is not eligible, we will write to you to let you know and we will explain our decision.

## Stage one decision making

We will review the information you provide in your expression of interest, assess it against the key criteria and, where relevant, review data and information from the Charity Commission, Companies House or other regulators' websites relating to your constitution and audited accounts from the past two years.

Final decisions on which projects to invite to submit a full application will be made by the National Panel who will review all expressions of interest together using balancing criteria in addition to the key criteria. The balancing criteria include the relative strength and value for money of the project when viewed as part of a national portfolio of projects and the need to ensure the right mix of projects across the UK.

## Stage two, full application

If you are invited to submit a full application, there is no guarantee that you will be funded. Projects will undergo detailed assessment and have to meet high quality standards in order to be successful. The main assessment criteria are:

- Capability: How you will lead and manage the project
- Financial viability: How you will ensure financial viability and value for money
- Working with delivery partners: How robust are your proposed working arrangements with your delivery partners?
- Coordination of an effective portfolio: How you will ensure that the portfolio organisations deliver their projects?
- Additionality: How you will demonstrate that your project delivers services that are additional to those funded by Government and how far will the services and/or outcomes complement existing initiatives
- Impact: How will you demonstrate impact and measure success?

As far as possible, we will support and work with applicants during the full application stage to give them the best chance of success.

The National Panel will meet again to agree which stage two projects to fund, using similar criteria to those mentioned above, but also taking into account the assessment of the stage two criteria.

Funds are limited and therefore the National Panel will use its discretion to choose which projects to fund in order to ensure that we have a good spread of funded projects and to differentiate between projects that are considered fundable. The National Panel may also decide to offer partial funding to projects if some elements are deemed to be weaker or less appropriate.

Please note that we may also take the decision to part-fund proposals (this may involve awarding less money than was applied for).

If we do not offer you a grant, we will tell you the reason why in a feedback letter.

## Accepting our offer

If we plan to fund your project you'll need to accept our grant offer and the terms and conditions within **4 weeks** of receiving the offer letter and, and we'll ask you to send us details of your organisation's account that you'd like us to pay the grant into.

Payments will be staged according to the type of expenditure and the project milestones, and will be dependant on project progress.

## 2016 Timetable

Open for expressions of interest	➡	2 May 2016
Closing date for expressions of interest	➡	1 July 2016 (noon)
Expression of interest decisions communicated, and invitations to stage 2 sent out, by	➡	1 September 2016
Deadline for stage 2 applications	➡	7 December 2016
Stage 2 decisions communicated by	➡	30 March 2017

## Complaints

If you are not happy with the way we dealt with your expression of interest, please contact us and we will discuss this with you.

Please note that you can only complain if you believe we have not followed our published guidance when dealing with your expression of interest. You cannot appeal against the decision.

## Contacting us

If you have any questions about the Aged Veterans Fund or completing the application form, please contact us by email at [COVENANT-GrantTeamMailbox@mod.uk](mailto:COVENANT-GrantTeamMailbox@mod.uk) and we will arrange a phone conversation.