Meet the Funder Motability Transcript

So as I say, my name is Dani. I'm a Transport Solutions Manager here at Motability Foundation. I've recently been appointed to that to focus on Community Transport. Prior to that, I was a grant manager for three years working on the six programmes that we had historically. So there will be many of you on the call that I have spoken to before and there will be lots of you that I haven't.

I just wanted to do an overview of the grant programmes that we have open at the moment, specifically for Community Transport, the best way that I felt was to do that was to share my screen, if that's possible and just run through them on our website so that it also gives you a bit of a feel for what you're looking for on the website if.
And as you decide to apply, so if I can share and if people can just let me know when they can start seeing that.
https://www.motabilityfoundation.org.uk/organisation-grants

Yeah. So currently we have three grant programmes open or three funding rounds open for Community Transport. We have our if you go to the page where it's organisational grants and it will bring you to this page, you'll see that there are several funding programmes open there, you'll be looking at the three that are in the middle. So if we start with the small grants and then obviously as and when you've got questions coming through, please do pop them in the Q&A. And then once I've gone through the funding programmes themselves I will give a bit of an overview of what we're looking for within applications, but I will touch on what we won't be able to accept in each one also. So we have the small grant funding grounds, which is available from 50,000 to 149,000 / a period of three years.

So a starter for 10 on all of the funding rounds, organisations have to have been operational for three years when we're saying operational, they need to have accounts that are being submitted to the charities commission, companies house, FCA and places like that, we we can't accept ones that are newly

operational and have just a year's worth of accounts with Charity Commission. They have to be for three years and it has to be an income of over £50,000 for those three years. So on the small funding round, you are able to apply for operations that are currently running at the moment and they can be your dial a ride services, volunteer
schemes, non-emergency patient transport. If we if you are doing school transport, we just ask for you to speak to a grant manager prior to that so that we can get a bit of a gauge on what school transport you're looking for.

The grant itself can be used for funding schemes, programmes that you're operating in-house, and it can be for staff and volunteer training costs. So that does include Midas training also and the wider Midas training and funding to increase the number of vehicles available to help your organisation to support disabled people to access the wider community. So if you currently have a minibus at the moment and it's operating to capacity, we'd really like to hear from people that are struggling to get that capital funding for an additional minibus or if you are struggling for things like retaining volunteers or volunteer drivers, admins, volunteers and things like that. We would want to hear from people about that, around volunteer training as well, and volunteer retention. The grants themselves are full cost recovery. So that is anything from the vehicle staffing, onboarding of staff, laptops, uniforms, branding it really is your full cost recovery on that.

So if you're looking at it and thinking well as an organisation, we need an additional minibus. However, we don't know how we're going to pay for that to be on the road. We don't know how we're going to pay if there are any maintenance costs on it when you're looking at your budget, those are the kind of things that you can put in there.

The things that we can't fund, and this is across small and large grants, is a shuttle service. Now when we're talking about a shuttle service is if you have a set location and you're bringing people to the location to access things like community events. If you're holding those, or if you're holding lunch, lunch sessions, wider community events, but they're within your centre, so it's an A to

B journey. We won't fund that. So it is a shuttle bus service as in from your centre to a person's home, back to the centre.

Again, if you are doing that and then additionally you are doing community journeys that are wider than the premises itself, we won't class that as a shuttle bus service. It's just if it is A to B, we won't do overseas travel. We are a UK based charity. We haven't quite ventured out into overseas travel just yet, so we won't fund overseas travel. We don't do construction projects and or building works. The only the only difference on this is if you are applying for an EV vehicle and you've got the evidence to show why you're applying for an EV vehicle, we will do the construction for there being EV charging being put in place at an organisation, activities or services unrelated to the transport for disabled people.

As I'm sure many of you are aware, Motability Foundation's aims are for disabled people to access transport now, so if there's anything in there where there it's unrelated to transport for disabled people, we won't fund that. If for any reason you are looking at a project and it's £100,000 and 70% of your Members are disabled. We would look at funding 70% of that project. So if the organisation can look and go, we can fund the 30% or we can get funding from elsewhere. We will certainly look at an application and we'll just come back to you and say we'd fund the 70% of that.

Social investment or venture philanthropy sponsorship for any individual group or company and medical care or medical research. The medical care, recite the medical care side of things. If we go back to the funding for non-emergency patient transport, I know this is quite a difficult thing for a lot of CT organisations when you're looking at medical transport for GP surgeries and hospital appointments. We will look at, we will look at those applications and we will take them very seriously because we're very aware that the transport for hospitals is few and far between.
And for GP surgeries, it's when it's an encompassing application, so they're in, they're included in the other things that you are doing, the certain things that we won't do is where you're looking to do transport that is essentially taking place

where an ambulance should be really. We're aware that the NHS are struggling with vehicles and delivery with transport, so we will look at those applications.

If we go back to the large one. So the large grants are very similar to this. The difference is the value of those is £150,000 to £1,000,000. So both of these grants are over a one to three-year period. We when we previously did the Community Transport grants in our first phase of funding, we didn't look at pilot schemes. This is where there's a very big change on both of these grants. We will now happily look at a pilot scheme application. So again, if you're an organisation where you're looking and going well, actually we really want to set up a shopper service or we want to start it where we can start doing journeys for your local community to access things, even just like the hairdressers, we're very, very aware how difficult it is for people to get out at the moment and we're very, very aware how important Community Transport is to communities. So we **are** now looking at pilot services. The only thing that we do ask for things like that is if you are looking to set up a pilot service that you've at least spoken to your local community, so you've put a survey out to say we're already doing XYZ services. Is there anything else we can do for you and they are not explicitly coming back to you and saying, Oh yes, I'd like to get to my hairdressers on a Wednesday afternoon but if you are getting a whole lot of your community coming back and saying we'd love if there was a shopper service open on a Wednesday afternoon and a Saturday morning and you currently don't operate on a weekend, but you're looking to, we would happily accept applications for that. The only thing that we do ask is if you are looking to an extender service and apply for a new minibus, that you're not getting a minibus that is left with quite a lot of dead miles throughout the week, so that you either have it plug in other gaps where you've got or you're able to hire it out to other community groups and things like that.

For both of these funding rounds, the smaller ones are very much for the smaller
Community Transport organisations, the ones that you of you are very grassroots organisations and are struggling to find that additional funding again when these when these programmes were first set up, some of you will be

aware that in 2022 the eligibility was £150,000 and above. We had an evaluation done of that first phase of the programmes and there will be some of you on the call that we reached out to to say where what are we missing here? Where are, where are we as a foundation and a funder not helping Community Transport organisations and I'm aware that the eligibility that we've got now will still not be reachable for some people, but it is certainly something that we're working through and talking to Community Transport organisations and CTA about, so we dropped the threshold of the eligibility to £50,000 and then we opened up the smaller funding round and that really is for the smaller organisations to kind of put a really positive foot in front of the other and to go right, we can now build what we've got. We can build on what we've got, we can reach more of our community and we can do it knowing that this funding is there for the next three years.

If you apply for three years, like I said, you can apply for one.

The larger one, which is this one, is the £150,000 to a million. So that is certainly where people are really looking to upscale the work that they're doing. If you are looking to get a much larger fleet or you're looking to recruit more in house staff, be that drivers, admin project officers, Community Transport managers. That's very much where this larger one sits. If any of you on the call are looking and going well, actually we were looking and we're kind of between say £130,000 and £200,000 and you're not sure where you're going to sit? Please do just pop an e-mail over and we can certainly book a call with one of the grant managers and they can go through it with you.
grantstoorganisations@motabilityfoundation.org.uk

We have it on both of the funding rounds where we automatically put 15% of overheads on top of what you're applying for. So that's one thing to bear in mind when you are doing the budget is we will, we will automatically put 15% on. But if you aren't sure and you are looking and going well, we really want to do 2 pieces of work, but one puts you over that 150,000. And do reach out and we will have that conversation with you to see whether we would encourage you to go for the large one or whether we would sit and say actually what we would ideally look at is part A and maybe once you've delivered that we could revisit and then

then go back to the Part B.

We then have which is a new funding round for us, which is building a resilient Transport Community and shared transport sector. I think as a whole we're very aware, especially across the four nations of the UK, there are differences that are happening across all four. We're also very aware that funding is different across all four nations and we are very interested in being part of and helping the Community Transport sector to become more resilient.

We all want Community Transport sector to be here for years and years to come. The work that you will do is fantastic and the help that you give your communities in making sure that people can just generally get out and about is second to none. This funding round is £50,000 to £1,000,000. And it is so that all organisations can apply for it. The difference is we have highlighted 5 areas that we will specifically be looking at within any of the applications that come through. So they are your new operating models, shared infrastructure, collaborative approaches, digital transformation and enhancing volunteer capacity.

We will always look at partnership applications. So one thing I would say is if you are neighbouring another CTO, please do speak to each other. Please do see if there's a way that you can put a partnership application in together.

On that note as well, if there are any of you on the call that are under the £50,000 income threshold and you don't meet that eligibility again, speak to your neighbouring CTOS if they are above that eligibility, they can be a lead on an application and you can do it together as a joint venture. The collaborative approaches and the shared infrastructure is really important to us. I certainly know from the past three years of working at the Foundation and speaking to a lot of you on this call your knowledge that you have as CTO's is phenomenal and there will be some of you that will learn really well from others on different ways. Some of you will be really, really good at recruiting and retaining volunteers. Some of you will have fantastic digital booking systems and there will be others that are still working on Excel spreadsheets and taking calls and going

'actually, how do I, how do I step into having a booking system, where do I go with this?' We would really encourage especially on this building resilience one that you are talking to each other and seeing where you can combine forces and really really come together and put through a strong application.

That's not me saying that you can't put a strong application through as an individual organisation. If you are looking at that and going actually we want to do this by ourselves, we are specifically looking for what is here for our organisation. You are very welcome to do that as well. We would just like there to be more conversations happening and us seeing more partnership applications coming through.

The digital transformation is very much around that. It's around booking systems, it's around your websites, it's around how you can be meeting your Members' needs a lot more. And again, we're also very aware that there are people who are your Members and they will look and go I'm not going onto the website to book. I'm not doing it through that way. I don't want to do it in a digital way. I want to pick up the phone and have a conversation. That's fine if that works for your organisation, that is absolutely fine. This is certainly there for organisations that want the booking systems in place. That would like to enhance their websites and move that way, enhancing volunteer capacity. I was a fundraising manager for seven years prior to this. I'm very, very aware of how difficult it is to recruit volunteers and how hard it can be to retain volunteers, especially now we know that there are difficulties and challenges around the D1 licences and around people coming on board who don't necessarily have that. If there are other ways where you are looking at it and you want to reach a different generation of people who don't have D1 licences, we will accept the applications where you have that additional training that is separate from the D1 licences to ensure that you've got volunteer drivers. I think it's been a really, really difficult time for CTOs over the past couple of years to get volunteer drivers and to really have, I suppose, the enthusiasm that's there to stay and you know, I convinced my dad to sign up as a volunteer driver with his local CTO to where he's just moved and he's he's having an absolute blast doing it so. So I think it's really important that when you are looking at your applications that

you're going, if you are getting a new minibus and you are getting a volunteer driver, that you're still looking at that volunteer capacity and going where can we put in the budget that we can do even if it's down to reward and recognition and things like that with your volunteers. Can you put those things in to make sure that you're really retaining them? Volunteering is super difficult at the moment and to get people to actually give up their own time is quite hard. So it's a key part within this building resilience, one where we are looking at the enhancing volunteer capacity. So we will support those.

The other thing as well on there is it's the same with what we can't fund is the same as the other rounds. But again, if you are looking at this one and going well, actually we want to do a new digital infrastructure and apply for a new minibus and you're not sure if that fits in large or building resilience, please again do just reach out and you can have a conversation with one of the grant managers. I will stop sharing this now because that's the funding rounds and we can share after this the, where the website is and where you can directly go for it.

I think with the applications themselves, the sort of things that we will look at is free reserves. So an organisation needs to have at least three months worth of free reserves. Again, if this is something where you're not sure whether you would meet that within our due diligence, we will happily run your accounts before you put an application in. So you can e-mail your accounts over to us and we can run them through our due diligence and we can come back to you of where we sit on that. We we do have a set due diligence for all organisations and I'm aware that there are a number of organisations that will look at their free reserves differently to others, so if there's any uncertainty, send it over because ours is a very hard and fast rule that we can't put anything through to panel if you are under three months free reserves.

You need to have an annual income of the £50,000 for at least three financial years and this is assessed against accounts filed with the relevant regulator. Your we will also look at things like your governance and your general finances, so your board needs to be made-up of at least three members. If it's not we, it just needs to be outlined into your articles association where it differs, and if you

have any board members that are related to each other or related to a member of staff, you need to have a conflict of interest policy to support that.

That's the things that we are looking for within an application will be your impact that you are having within your community. I am quite certain that all 83/82 I'm not a CTO but all CTOs that are on the call will very easily be able to show where you have an impact. We will also look at the evidence to support your application. So if you are looking to expand your services, we would like to see where and why you're looking to expand the services so it could be things like you are at capacity or on the journeys that you're already doing and you're having to turn down journeys. It could be that you are a CEO or a Managing Director that really is spending quite a lot of your time planning journeys and things like that, and you need an admin member in place. Or you would like a project officer in place. We will also look at things like your capacity and capability of an organisation. It's a really hard one to look at because for everybody, when you're putting in an application in, in your mindset, you're going.
Go and we have the capacity and capability of this. We very, very rarely go back to an organisation and say that that is the reason why we can't put an application through if there are any on any of these things, if there are anything where any of the grant managers or myself or Chelsea, who is also one of our other new TSMs, who I do believe is on the call, is looking at an application and going we're not quite sure we we really, really do like to think and feel that we are very transparent and honest funders. We will certainly come back to you if there is anything where we are questioning an application and ask you those questions.

If an application comes through and it's under three months free reserves, that's where we'll be saying we categorically can't either take this through or put it through to panel. If there is something in there where we're going well, similar to what I said beforehand, if you're putting forward for £100,000 and 70% of your Members are disabled, we would come back to you and clarify that and let you know that we're putting it forward at the 70% worth of funding. And can your organisation sustain?

And the other 30%, if there's anything on there where we're not sure whether your articles of association are different to what we're seeing on your websites or anything like that, again, we would come back to you and have that conversation.

For the applications themselves, they differ slightly with the process. So for those of you who have received funding from us before or have applied before within our first phase, so that is prior to September of this year. Previously you would have filled in a PDF form and emailed that over to us. Now you will log into a portal and you will get your login for that portal and that the funding rounds will come up. You will select which funding round you want to go through to and everything is on there that you need to fill in.

For the small grants, it's a single stage application, so that is one application that will come through to us and the decision will be made on that single application. For the large grants and the building resilience, it's a two stage application. So you have an EOI which is your expression of interest. It's a very light touch. What are you looking to do and send your budget over? And then if you are successful at that stage, you would be invited through to the final application. That's a lot more detailed. The only thing I would say is the moment that you are invited through to a final application, the turn around to have that application back to us is 4 weeks and that's because these funding rounds are open for a duration up till the end of December and the building resilience is the end of January. We just want to make sure that on the final application, everyone is getting the same amount of time to send them back over.
Again, we're available for questions throughout that.

There will be some, there will be, I would presume that there will be some touch points within that portal where you'll potentially go. I I'm not quite sure about this. I can tell you now I've been doing this for 3 1/2 years and I will still look at a log frame and go, actually I need to refer back to the guidance on this for the log frames.
A number of organisations wouldn't have seen those before. There is guidance on the website, which is very helpful. Sometimes it's just easier to speak to

someone for them to go through it with you. So if you get to any stage of the log frame or anything like that, please do just contact us if you're struggling with it. There the other thing to highlight is the portal and our system is very new. This is a new thing for us. It's a learning for us as much as it will be for everyone on this call who decides to apply. That being said, there are still some bugs that sitting within the portal, I would just say please be patient with it. There are certain parts that you can override which is the budget and the log frame. Please don't override that. I would be really really grateful if you could put your budget in and fill out the log frame if you are doing an expression of interest. You don't need to fill in the log frame if you are doing a small application. You need to fill it in for a large grant. The only reason why I say not to override that is because it will extend the time that we come back to you with a decision because we'll have to be coming back to you to then get those details.

The budget as well. Whilst you can fill that in on the application form, we need the Excel budget so that we can see the breakdown. The way that the application form works at the minute is it's staff costs, capital costs, project costs and you're putting in the full number of that for years one two and three. The budget that you can submit through the portal is the Excel spreadsheet, so it would say e.g. staff costs £50,000, £25,000 for a driver, £25,000 for a project officer. Also, they're not the salaries we look for, by the way I was pulling numbers out the air then!

As a whole, we are really looking for organisations that are looking to grow the services they they've got and that's either an expansion of or a pilot of something. We're really, really looking for those partnership applications across all small, large and the building resilience funds. Again if you are looking and you don't fit the criteria, please do reach out to your neighbouring CTOs, see if they can support.

It's certainly as ever as it was in phase one, it's a very busy funding round and we can't make any promises to anyone. But please, if there are, if there is anywhere where you're unsure or you're kind of flitting in between two ideas on what you want to put an application for, and you want a second opinion on it. We can

certainly do that. The only thing we can't do is read your application before you submit it. We're here to support and we're here to make sure that as many of you who are applying succeed with that.

So I think that it's just one of those things that if you want to pick up the call, pick up the phone call us, drop an e-mail over, send over your finances so that we can do those checks beforehand. But generally they are my main hints and tips. The last one is probably one that I used to do terribly as a fundraiser and I used to put in like really sad stories about things and be like that, that, that that will help with funding; we are really looking for like facts around what you're doing. If you've got a case study and you want to put it in, please only put that in if you have the word count to be able to do that, don't take away key information to put a case study in. We will hear about those case studies as and when and if you're funded, we will hear about them and we will suck them up like a sponge over the duration of your funding.

It's a really good thing for us to know as funders and as you're aware, the Foundation is wider than these funding rounds. We like to let people that are within this building know and other members of staff know the impact that you're all having as CTOs, so.

Please, please only do ever put a case study in there. If it's not taking away from anything else that you're doing, if it if it lends to it and it's a really crucial part, do put that in. But we will certainly ask you for them in floods afterwards, so we will hear about them.