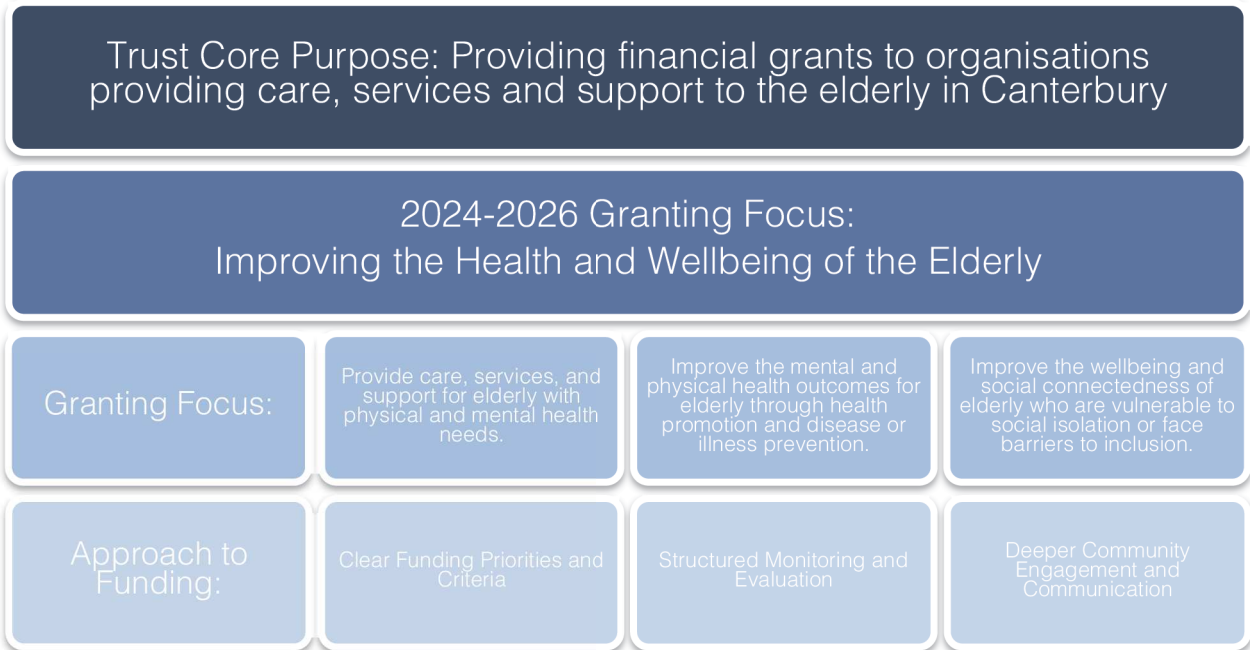


Manchester Unity Welfare Trust Board 2024 – 2026 Impact Funding Strategy

Charity Registration Number: CC10458

Strategy Summary



Manchester Unity Welfare Trust Board

OVERVIEW

The Manchester Unity Welfare Trust Board (MUTWB) was originally founded in 1966 by the North Canterbury District of Manchester Unity Friendly Society and Age Concern Canterbury to provide residential and hospital care for the elderly in Christchurch. This resulted in the establishment of a prominent care facility, the George Manning House. However, with the provision of numerous private facilities and government subsidies for residential and hospital care, the demand for MUWTB was greatly reduced, and the facility was sold in 2006, resulting in a considerable Trust Fund.

Today, MUWTB manages the Trust Fund and supports organisations that provide care, services, and support for the elderly in Christchurch and Canterbury, with financial assistance via annual grants. Since its inception as a funder, MUWTB has distributed over \$2 million in funding across 150 grants to 37 organisations in Canterbury. This funding supports organisations to promote the health and wellbeing of the elderly, to enhance opportunities for participation and social connection, to improve housing conditions, and access to services. The table on the following page provides a summary of the grants provided in the last three years.

	2023	2022	2021
Income			
Portfolio income	\$198,404	\$199,994	\$163,590
Outgoings			
Number of Grants made to eligible organisations	16	22	12
Number of Grants declined	8	7	5
Total Grants paid or approved to eligible organisations	\$150,000	\$199,638	\$127,263
Average grant value	\$9,375	\$9,074	\$10,605

Summary of MUWTB Grants 2021-23

TRUST PURPOSE

Within Manchester Unity Welfare Trust Board's Trust Deed, the purpose of the Trust is as follows:

*"The Manchester Unity Welfare Trust Board's primary purpose and objective is to hold in trust the one-half share of the proceeds from the sale of property that has been invested in accordance with the Trustee Act 1955 and the income thereof shall be paid to such charities registered the Charities Act 2005 or the Incorporated Societies Act 1908 and exempt from income tax by the IRD which **provide care, services and support for the elderly in Christchurch and Canterbury** as shall at the discretion of the Board be deserving of assistance and in such proportions as shall be decided by the Board."*

2024 – 2026 Granting Strategy

OVERVIEW

Manchester Unity Welfare Trust Board is committed to supporting organisations providing care and services, for the elderly in Christchurch and Canterbury. Between October 2023 and February 2024, the Trustees commissioned a stakeholder engagement and research project to identify the most pressing challenges faced by the elderly in Canterbury, undertaken by Barrer & Co. This research has been used to inform the Trust's granting strategy for 2024 – 2026.

NEEDS ASSESSMENT RESEARCH SUMMARY

The population of Canterbury is aging, as it is globally. Whilst many are aging well and staying healthier for longer, for others this is not the case, and segments of our population are facing serious and complex needs. According to research, the most vulnerable within the population include those who are on limited, unprotected income, are living with mental and/or physical health issues, are over 85 years old, are living rurally, or are living alone. Our population is also becoming more diverse, and the need across ethnicities varies, with Māori and Pacifica facing greater needs, earlier in life.

Canterbury is a fantastic place to live for the elderly, thanks to good provision of local public services, the plethora of organisations working to support the elderly, the natural beauty of our region and a strong community spirit. For those who may need additional support, the biggest needs, or concerns for the elderly in Canterbury specifically are health, housing, facing the cost-of-living crisis, social isolation, and the digital divide. Less frequently mentioned but still of note are concerns around ageism, climate change, access, and safety. It is evident that our most vulnerable often need support with more than one of these areas of need, as they are all often intertwined, and one issue often causes or exacerbates other issues. The issue that occurred most frequently in conjunction with other issues is mental health.

GRANTING FOCUS AREAS

Manchester Unity Welfare Trust Board's granting focus for the 2024 grant round is *"Improving the Health and Wellbeing of the Elderly"*. In focusing strategically on this area of identified needs, Trustees believe they can have the greatest impact potential, considering the funding available for distribution and the landscape of support and investment into other areas by other funding bodies, organisations, and local councils.

The Trust will therefore prioritise grants towards organisations, projects, or activities that:

- Provide care, services, and support for elderly with physical and mental health needs.
- Improve the mental and physical health outcomes for elderly through health promotion and disease or illness prevention.
- Improve the wellbeing and social connectedness of elderly who are vulnerable to social isolation or face barriers to inclusion.

Theory of Change for 2024-2026

Our Focus Areas Statement:

We want all older people in Canterbury to be able to age healthily and happily with respect and dignity, regardless of their socio-economic status, location, or access to healthcare.

Problem Statement:

While many older people in Canterbury are staying healthier for longer, a segment of the population faces significant physical and/or mental health issues, social isolation, or lack of connection, leading to diminished wellbeing and quality of life. These two issues (health and social connection) are frequently seen co-existing, as one issue can cause or exacerbate the other.

Theory of Change:

We will allocate financial grants to organisations who provide care, services, and support for the elderly. Where we can, we will provide external guidance and support for leaders of the community groups on the ground to support their work.

We will focus this granting for organisations who:

- Provide care, services, and support for elderly with physical and/or mental health needs.
- Improve the mental and/or physical health outcomes for elderly through health promotion and disease or illness prevention.
- Improve the wellbeing and social connectedness of elderly who are vulnerable to social isolation or face barriers to inclusion.

We hope that this leads to:

1. Greater overall health and wellbeing for elderly individuals, leading to a more vibrant and inclusive society.
2. Reduced burden on healthcare systems through preventive healthcare measures and early intervention strategies.
3. Empowered and resilient elderly populations capable of aging with dignity and independence.
4. Long-term societal benefits resulting from improved elderly health outcomes, including economic productivity and social cohesion.

Within this theory of change, we assume several things:

1. We will have sufficient investment return to provide financial grants each year.
2. Projects, services, and activities already exist to deliver the outputs and outcomes in our region.
3. The groups delivering this work know of and apply successfully to MUWTB.
4. Those projects and services are reaching the most vulnerable elderly in our communities.
5. Other agencies, funders and service providers recognise the needs of the elderly community and provide the funding and services to complement and enhance the work of MUWTB.
6. Changes in individual behaviours, community attitudes, and policy environments will contribute to sustained improvements in elderly health and wellbeing.

We will monitor and evaluate change considering the following measures:

- Service attendance.
- Outreach undertaken in the wider community.
- Age and ethnicity of attendees (reflective of community and segments of the population known to be more vulnerable).
- Community surveyed for input/feedback.
- Partnerships with key stakeholders.
- Services follow evidence-based best practice measures for engaging with the elderly. This includes:
 - Treating elderly with respect and dignity.
 - Being culturally responsive.
 - Promoting inclusion.
 - Promoting learning and development (of service delivery team and elderly).
 - Ensuring services are connected within the community.

Funding Approach

OVERVIEW

Trusts and Foundations can take many different approaches to funding. Some use small, contestable granting rounds with limited restrictions, much like MUWTB's original approach. Others take a more proactive approach, seeking out the organisations who are doing work that aligns with the funder's vision for change and inviting them to apply. For the 2024-26 strategy, MUWTB will continue to provide small grants (generally under \$20,000) via an annual contestable fund, and, in addition to considering the focus and outcomes of grant, will consider the applicant's eligibility for funding. The follow eligibility and criteria will apply to all applications.

ELIGIBILITY

- Applicant organisation must be a registered charity.
- Projects submitted must be exclusively for the benefit of the elderly. "Elderly" is defined as 65 years of age and over.
- Applications can be for operational and/or project costs.
- If any successful grant application includes any staff costs or project coordination costs, then any funding approval for these costs will only be for one year.
- If any successful grant application includes any contribution towards rent, then any funding approval for these costs will only be for one year.
- Funding is not for the spiritual activities of religious organisations.
- Funding must support organisations within MUWTB's region of Canterbury.

We note that this list may grow as MUWTB implements this strategy and uncovers other areas of eligibility.

CRITERIA

Organisations must show:

- A clear demonstration of need.
- Good financial management. Trustees acknowledge that significant reserves may be held and tagged for a specific reason. If tagged reserves are of a considerable level, an explanation within the application on why they are held will be expected.
- Projects are be informed by the community.
- Collaboration with other local, regional, and national groups.
- Services follow evidence-based best practice measures for engaging with the elderly.

FUTURE ENGAGEMENT

As MUWTB moves away from transactional, broad funding to more focused, impactful work, Trustees will trial engaging with individual organisations who closely align with the focus areas. The purpose of this will be to understand how MUWTB can have a bigger impact through its funding by providing support to the organisations from the Trustees' individual experience, perspective, and knowledge. This reflects the movement towards trust-based philanthropy¹, understanding how relationships between grant funders and grantees can support the organisations to have a greater and more equitable impact for their communities.

¹ <https://www.nptrust.org/philanthropic-resources/philanthropist/trust-based-philanthropy-a-primer-for-donors/>

This approach will see each Trustee (with the capacity to do so) connect with one grantee organisation in the first year of this strategy period (proactively chosen by Trustees - this aspect of the strategy is non-contestable). It may lead in future to a strategic partnership with organisations through larger or multi-year grants, but this will be at the discretion of Trustees, and will not occur until at least the second year of this strategy period.

Evaluation and Impact Measurement

To support MUWTB's Theory of Change, robust monitoring, and evaluation mechanisms to assess the effectiveness of projects or services towards intended outcomes, will be implemented as part of this strategy. MUWTB will include questions within the application process to highlight the target audience, the need for the work, community input and collaboration, and the intended outcomes of the project (See Appendix 1), developing a funding assessment framework to guide assessments of applications and encouraging more structured reporting by grantees.

FUNDING ASSESSMENT FRAMEWORK

A framework has been developed to ensure consistent and thorough assessments of applications, including prompts for further information requests to support applications. This framework considers each question, and how different answers might affect eligibility or alignment for funding. It is a tool for Trustees to use, adapt and grow moving forward (*internal resource only*).

MEASURING CHANGE

To monitor the change that has occurred with a MUWTB grant, a more structured report will be requested from grantees prior to 31 January. This will include requesting information on:

- Service attendance numbers.
- Outreach undertaken in the wider community.
- Age and ethnicity of attendees (reflective of community and segments of the population know to be more vulnerable).
- Community surveyed for input/feedback.
- Partnerships developed/maintained with key stakeholders.
- Progress made towards intended outcomes.
 - See Appendix 2 for Evaluation Form.

As per the current process, this report will be a requirement for eligibility for future granting rounds. We recommend an additional step is included in the calendar of activity to include a reminder and attached reporting form to be sent to all grantees in the November following the grant payment. As this is an important document for MUWTB to understand the impact of its funding, all grantees must complete this step.

IMPACT REPORTING

Each year, MUWTB will develop an impact report to share with the public. A suggested structure for this report for the 2024/25 financial year would follow:

- Introduction from Trustees
- Case study from a particular organisation
 - For 2024/25, this may be from an organisation that Trustees engage with.
- Reflections on first year of more focused funding
- A snapshot of key statistics:
 - Total amount funded.
 - Total number of grants.
 - Number of elderly supported.
 - Any other significant pieces of information collected
 - Summary of accounts

- o List of grantees

This should be accompanied by professional and impactful photos, shared by the organisations MUWTB is supporting. By sharing a snapshot of MUWTB's impact, the organisation is encouraging transparency and celebrating success within the community. Additionally, this holds the organisation accountable to those it serves.

EVALUATION OF STRATEGY

This strategy has been developed following research and stakeholder engagement by Barrer & Co, and has been set as a strategy from 2024 to 2026. After each year of the strategy, Trustees should evaluate the success of its implementation. This should include reviewing the clarity of communications and any feedback provided by grantees, the assessment framework and any additions or amendments the framework requires. Trustees need to ensure that any internal or external factors that arise are considered, such as change in funding from other funders, or events effecting the community that might drastically affect short-term needs and make any changes to the strategy and implementation as necessary.

After the 2024-26 period, it is recommended that a reassessment of community need is undertaken to inform the future funding focus for MUWTB.