



Application Criteria and the Pilotlight model

Pilotlight is a charity committed to relieving poverty and achieving positive social change through promoting the effectiveness and efficiency of small innovative charities that are working to reduce disadvantage.

We do this not by giving grants, but by providing the expertise of business and industry professionals to help charities strengthen their management, governance, leadership and sustainability through the development of strategies, systems, structures and skills.

1. Our priority for investment

Our priority is to increase the effectiveness of small charities that are tackling disadvantage. We seek to:

- Encourage innovative work
- Nurture leadership
- Develop organisational infrastructure and improve systems
- Increase organisational effectiveness and the efficient use of resources

2. The types of organisations in which we invest

a) We view all applications on a case-by-case basis and can be flexible about the type of organisations with which we work. However, our partner charities will normally:

- Work with disadvantaged people in the UK
- Be operating a minimum of two years
- Have a turnover of less than £3m¹
- Be willing to evaluate their work and measure results (or already doing so)
- Be open to change and challenge
- Be able to commit sufficient resource to Pilotlight's model of partnership working
- Be pursuing best-practice in their field
- Be ambitious to grow
- Bringing particular organisational challenges to the table for discussion with Pilotlight.
- Have a paid staff member who will be an ongoing point of contact (normally the director)
- Have a member of the trustee board who is interested in being involved in the collaboration throughout
- Have secured core funding for the next six months
- Have inherent capacity for development and growth

b) We will **not** normally invest in the following:

- × Organisations still in the first year of operations
- × Organisations that do not have a full-time member of staff with whom to build the relationship
- × Organisations solely seeking sponsorship or financial support by the private sector members

¹ Often around £100,000

3. We welcome applications from

- Organisations that do not have a history of strategic planning
- Social enterprises, community-interest companies and organisations that have the potential to develop diverse income streams
- Organisations that differentiate their services, take a unique approach to serving clients
- Organisations where there is a demonstrable need for what they do and have clear target clients/beneficiaries
- Social entrepreneurs that can demonstrate passion and commitment

4. What we can offer

Our investment is the time, skills and expertise of our members who provide professional volunteer support. Pilotlight recruits its members, all at senior director level, from business and industry. The members contribute their time and share their experience, talent and knowledge to help charities build their organisational infrastructure and meet their goals more effectively.

5. How we work in partnership

Pilotlight's relationship with partner charities is built around openness and shared commitment to Pilotlight's model of working (see How Pilotlight Works for a detailed description of this). Our focus and motivation is to help the charity's leaders build the capacity and strength of the organisation itself to be more effective and more enduring and help a larger number of disadvantaged people.

Successful applicants will sign a standard contract with us at the beginning of the relationship. We then work collaboratively with the charity to develop a Business Plan outlining mission, objectives and strategies for achieving them.

Once the areas where Pilotlight's members can contribute significantly are agreed, we match the members' skills and expertise to the need. Each charity is assigned a dedicated Project Manager that manages the relationship throughout and acts as a constant point of contact for the charity director. The Project Manager plans, facilitates and minutes all meetings and follows up on actions, thereby ensuring that progress is being made and targets are being met.

6. Advice to applicants

We hope the following information might help a charity make a more effective application.

- We will be able to give you a decision on your initial application within two weeks of receiving it.

a) How to apply

We have a two-stage application process: a) application form b) a meeting with short-listed candidates for a more thorough assessment. Please do contact Helen Lang (for Pilotlight London) on 0207 396 3559 or Michelle Davitt (for Pilotlight Scotland) on 0131 243 2767 for advice or guidance on filling in the application form if needed.

b) Application

Charities express their interest in working with Pilotlight by completing an application form. We accept applications on a rolling basis. When making your application:

- Please write or type clearly in black ink
- Please email a copy of the form to the Pilotlight office
- Please post us the original copy of the form plus a clear photocopy

- Please answer all questions on the form. Attachments are not acceptable as a substitute.
- Please attach only the additional information we have requested. If we need any further information we will request it.

We carefully review all applications and shortlist those that most meet our priorities and criteria. We will contact all applicants either by phone or post with our decision. Pilotlight reserves the right not to accept incomplete applications.

c) Assessment Meeting

Two Project Managers will visit short-listed charities to talk to the management team about what they do, and how they think Pilotlight may be able to help.

A report will then be written with an opportunity for the charity to review it before it is presented to an internal Pilotlight committee. This committee will make the final decision on the suitability of candidates based on its assessment of whether or not the charity will benefit from the type of assistance Pilotlight can offer. If approved, the charity will then be asked to sign and return a standard contract.

Both parties then proceed to developing (or revising, if one already exists) a Business Plan for the charity. This will clearly define the tasks required to meet the charity's core objectives, and with which of these Pilotlight will assist.

7. Stages in the relationship call it a process?

- **Administration (2-3 months)**
 - Informal conversation between charity and Pilotlight staff
 - Application form submitted by charity
 - Assessment meeting: Pilotlight meets with charity
 - Project managers make recommendation to internal committee
 - Charity signs and returns a contract
- **Relationship building (4-6 months)**
- **Strategic planning process (6 months)**
 - Pilotlight members hold a series of meetings with the charity to develop (or review existing) a Business Plan and a list of projects, if any, to be undertaken by Pilotlight members
 - The plan is approved by both the charity's board of trustees and Pilotlight before proceeding
- **Review and reflection (1-2 months)**
- **Project stage (3 months)**
- **Follow up (1 month)**