



KPMG's National Charity Partner - Application Form

Thank you for applying to be KPMG's National Charity partner. All applicants must use this form to complete their application. Please ensure that your responses stay within the specified word limits (where stated).

Once you have completed your application form, please email this together with your most recent annual report to ukfmnc@kpmg.co.uk. Please ensure your form is submitted by **5pm, 30 April 2024**.

SECTION 1: COVER SHEET

| Organisation details | |
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| Charity name | |
| UK registered charity number | |
| Name of key contact and position | |
| Telephone | |
| Email | |
| Total income of organisation (last financial year) | |
| Total expenditure of organisation (last financial year) | |
| Total headcount (full-time employees + volunteers) | Total headcount FTE: Number of volunteers: |
| Existing KPMG relationships (any known KPMG colleagues): | |
| Please confirm that your organisation: <ul style="list-style-type: none">• Works in at least one of the following categories:<ul style="list-style-type: none">- Social Mobility- Social Welfare- Mental health/wellbeing• Impacts the lives in all KPMG UK office locations: See our current UK office locations here from Aberdeen to Plymouth.• Could offer fundraising and volunteering opportunities for colleagues across all KPMG UK office locations.• Could offer a series of strategic pro bono opportunities which draw upon our professional services portfolio. Please see here for KPMG's list of services to understand how we can best support you in a pro bono/thought leadership capacity.• Could deliver on KPMG's employee engagement aims and people priorities (e.g. also promoting reconnection, collaboration and wellbeing)• Could offer a mixture of in-person, virtual and hybrid opportunities for both one-off and longer-term engagement.• Can provide a way of clearly quantifying and communicating the impact of the partnership to colleagues and wider public.• Has an established partnerships team with a proven track record of managing national partnerships of a similar scale.• Is not an entity audited by KPMG and does not have affiliations via the Trustee Board or other Corporate Partnerships that could compromise KPMG's independence. | |



SECTION 2: YOUR ORGANISATION

1 Please use the box below to summarise your organisation's vision, mission and key services (200 words)

Vision:

Mission:

Key services:

2 What is your organisational strategy? (200 words)

Given we would be partnering with you from October 2024-September 2027:

- *What are the key aims of your organisational strategy during that period?*
- *What are you looking to achieve beyond that?*
- *Are you due to create a new strategy during our partnership?*



3 Please use the following space to describe how you fit into one or more of our three themes of: social mobility, social welfare and/or mental health/wellbeing. (200 words)

A reminder of our key 3 themes below:

- **Social Mobility**

Our vision is to help empower and drive opportunity in disadvantaged communities across the UK. So, where you're from, or your background, doesn't dictate your life chances. According to gov.uk, there are five drivers of social mobility: conditions of childhood: educational opportunities: work opportunities: social capital and connections: environment favouring innovation and growth.

- **Social Welfare**

The rising cost of living has had a profound impact on those with lower incomes. The Office for Budget responsibility has forecasted that living standards will fall by 5.7% during the 22/23-23/24 financial years. This will undoubtedly lead to an increase in use of services that help relieve the impacts of poverty.

- **Mental health/wellbeing**

There's a rising mental health crisis, particularly amongst young people, which has been made worse by the pandemic and cost-of-living crisis. Mental health problems cost UK economy at least £118bn a year and there is also an inverted relationship between mental health and social class.



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- a) Please use this space to share how your organisation delivers impact, services and/or reach in all local areas where [KPMG UK has offices](#). (200 words)

- b) Are there KPMG UK office locations where you do not deliver impact/services/reach. (200 words)



SECTION 3: PRO BONO AND THOUGHT LEADERSHIP

5 Through pro bono / thought leadership projects, how could KPMG’s expertise and skills help you achieve your charities aims to create long-lasting societal impact? (300 words)

KPMG has a wide variety of skills, knowledge and expertise across the business (outlined below). Please review the following pages on our website to understand our areas of work which could be on offer pro bono.

[Services - KPMG UK](#) – Please note, we do not offer pro bono audit services for independence reasons.

- [Tax - KPMG UK](#)
- [KPMG Law - KPMG UK](#)
- [Consulting - KPMG UK](#)
- [Deal advisory - KPMG UK](#)

Thinking about your organisation’s objectives and strategy, how could KPMG’s services help you achieve that through our pro bono offering (£500,000 over three years)?

Here we are looking for quality (long lasting societal impact) over quantity. For example, please don’t feel the need to describe projects in each business area if you think one or two areas may be able to best support your organisational objectives.



SECTION 4: VOLUNTEERING AND FUNDRAISING

6 What volunteering opportunities would be available to KPMG colleagues to support your organisation?

KPMG UK colleagues have six volunteering days that they can use each year. 50% of colleagues volunteered their time last year. KPMG UK are looking for a menu of opportunities that offer colleagues of all backgrounds an opportunity to engage with the charity. We'd like this menu to take into account:

- **Time:** some colleagues can commit an hour, some a day, and some are keen to support for even longer. We'd like to see a variety of opportunities that range from one hour to longer term/more intensive roles.
- **Location:** we'd love to ensure that colleagues across the UK can volunteer. A reminder of our [office locations here](#).
- **In person/virtual opportunities:** in a world of hybrid working, its important colleagues have the opportunity to volunteer in person but also at home / near their homes.

Please help us understand the volunteering opportunities that will be available to KPMG colleagues below:

| Volunteering role | Brief role description | Time commitment | In-person, virtual or both? | Location/s |
|-------------------|------------------------|-----------------|-----------------------------|------------|
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7 A majority of our partnership fundraising will come from KPMG-led activity, including our Big Walks Series and First Hour Appeals. Please let us know how you will be able to support those events to make them as successful as possible? (200 words)

This could include any support you'll be able to provide including staff resource, merchandise, case studies, speakers, etc.

For background: Our First Hour Appeal is when we offer colleagues the chance to donate an hour (or more) of their salary. This is then matched up to a certain amount by KPMG.

The Big Walks is a series of sponsored walks across the country, led by our events supplier, where colleagues raise a minimum fundraising target. See our [2023 Press Release](#) for more information.

8 Please use the space below to tell us about:

- Any national/organisational campaigns that you run or are involved with.
- Any spaces you may be able to offer KPMG colleagues in fundraising challenges/events.
- Any additional fundraising support you will be able to provide to support KPMG colleagues to raise money for your organisation.

In this question we're looking to understand what takes place every year in your business as usual. Is there a national appeal that you run for a week/month? Do you have places in fundraising events across the UK, etc?

(200 words)



SECTION 5: PARTNERSHIPS, ACCOUNT MANAGEMENT AND COMMUNICATIONS

9 Please tell us how your organisation will manage and resource the partnership with KPMG (200 words).

At KPMG, you will have a full-time account manager. You will also have the support of:

- *A Senior Manager (40%)*
- *Head of Sustainability and Corporate Responsibility*
- *National Charity Champions – a group of colleagues from across offices and business areas who will support your cause.*
- *Internal teams who can support on key partnership objectives including communications teams, staff network groups, etc.*

In this space, we'd love to hear about the different people that work for your organisation who can help support our partnership objectives.

10 Please use the section below to tell us how you will be able to help KPMG tell the story of the impact of our partnership both to our colleagues and to the wider public (200 words)

This is an opportunity to tell us about how your organisation will be able to share the impact of our partnership. Please let us know how your organisation will be able to help us engage and motivate colleagues to support your cause throughout our three years of partnership together.



11 Please list all your main corporate partners, including any companies similar to KPMG

12 Please list all members of your Trustee Board and their respective roles and companies

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KPMG may use this information to contact you regarding your application. To learn more about what information we collect about you and how we use that information, please follow [this link](#) for our Privacy Statement.

Thank you for your application.