Main Grants Programme 2019 - 2022 Assessment Sheet

Section 1 – Core Information

Name of applicant
Montage Theatre Arts

Is the applicant eligible to apply for a main grant	Yes	✓	No	

Reasons for ineligibility or any further comments

Is the application for Core or Project funding	Core	✓	Project	

Which main grant theme is being applied for	
	Strong and cohesive communities
	Communities that care
	Access to advice
✓	Widening access to arts
	Widening access to sports

Annual amount requested
£13,500

Application Form Question 25.	Details of any funding from Lewisham Council within the last 3 years?
	Arts Festivals Fund 2016 - 2017

Section 2 - Deliverables

Application Form Question 7	Tell us the issue you are seeking to address.
	Please ensure you are clear why this issue is Lewisham specific and why you feel the need is not met by the existing assets in the community whether they be people, services (both commissioned and non-commissioned) or available funding.
Score	3
Comments	The application identifies the issues of deprivation, childhood poverty and youth unemployment, providing data to back these up. It also provide information that suggests that *"Children engaged in arts go on to have better 'academic self-image' and more positive attitudes to school"* and that students from low income families who take part in arts activities are three times more likely to get a degree than children from low income families that do not engage in arts activities.
	The organisation work with older people seeks to improve well-being (physical, emotional and mental) and tackles social isolation.
Word count (400)	401

Application Form Question 8	Tell us the assets you will be seeking to engage and mobilise to assist you.
	These assets could include individuals, groups, buildings or any or specific strengths that already exist within your community including the lived experiences of those within it.
	Tell us the other organisations working in this area and how you will avoid duplication and add value.
Score	3
Comments	The application describes the organisations staff and volunteer assets (experience and skills) and those that come from existing networks and partnerships.
Word count (400)	385

Application Form Question 9	Please tell us what you will seek to achieve over the next three years both with and without the funding you are applying for.
	Please include details of how many extra people you would expect to work with, the outputs you will deliver and the outcomes you will seek to achieve.
	Please tell us how your service differs from those that are already delivered or commissioned by the council.
	You should state the level of funding that you would anticipate attracting during this period both with and without Lewisham's core support.
	As you are applying for Core Funding this section should set out your ambitions as an organisation and what Lewisham's funding will help you achieve rather than simply what 'we are paying for.'

	NB – this details in this section will form the basis of the monitoring of your organisation although the exact details will be agreement with once the grant has been awarded.
Without core funding from Lewisham:	
Comments	Without core funding the organisation have difficulty in continuing to deliver current provision and other deliverables such as the Volunteer programme, Youth Panel and in-school activities. The organisation also reports that it would be more difficult to access funding from other sources.
Word count (500)	243
With core funding from Lewisham:	
Score	3
Comments	The application describes a programme of work specialising in musical theatre with a number of specific targets designed to increase participation amongst children and young people and older people. The organisation works with a mix of fully paid for places, concessionary places and bursaries. Proposals include increasing the number concessionary places and bursaries.
Word count (500)	498

Application Form Question 10.	Please state how far your service offer is scalable. Please indicate below what percentage of your requested amount would still be feasible in terms of service delivery. Please tick all that apply	
75%	✓	
50%	✓	
Other	✓	
Comments on value for money of revised offers	The organisation puts forward three options based on different levels of funding with a clear indication of what it would be possible to deliver with each level.	

Application Form Question 11.	User profile – this table is copied directly from the application form	
PROTECTED CHARACTERISTIC	**PLEASE TICK**	**FURTHER DETAIL**
Age	✓	
Disability	✓	
Gender	✓	
Gender reassignment	✓	
Marriage & civil partnership	✓	

Pregnancy & maternity	✓	
Race	✓	
Religion & belief	✓	
Sexual orientation	✓	

Application Form Question 12	**Please set out how your proposed programme will engage those who do not traditionally access services.** **This engage should relate to both the protected characteristics but also other groups.**
Score	4
Comments	The organisation uses a range of ways to engage will people who do not traditionally access service. This includes: • Proviision of bursaries and concessionary places • Montage is OFSTED registered, allowing childcare vouchers. • Children and young people are engaged in a school setting to help remove barriers to participation. • The organisation also works with housing providers and other local groups to gain greater access to communities.
Word count (300)	299

Section 3 - Track record, finance and governance

Application Form Question 13	Collaboration and delivery: your track record of working in partnership and delivering quality services. Please use this section to outline the partnerships you have developed over the last three years. Please detail who you have worked with and what you have achieved. Please also details the three service achievements during this period of which you are most proud.
Score	3
Comments	The organisation has worked collaboratively with a number of organisation from different sectors, including schools, other arts organisation and statutory providers. Information is provide about these projects and their impact
Word count (500)	490

Application Form Question 14	Resources: your track record of attracting resources both financial and human. Please complete the below tables detailing your track record of the following over the past three years: • funding applications both successful and unsuccessful • other fundraising activities • volunteer engagement Please add extra rows as required. Please use the space below the tables to provide further details as required (200 words max).

Total number of funding applications in last 3 years	Level of funding requested	Outcome/level of funding received
14	£146,010	£46,624

Number of fundraising activities undertaken in last 3 years	Level of funding achieved
11	£54,444.43

Number of volunteer engagement activity undertaken in last 3 years	Approximate number of volunteer hours delivered
	1500

Score	4
Comments	The organisation has submitted a good number of funding applications The proportion of successful fundraising to Council funding is good. The organisation also makes good use of volunteers.

| Application Form Question 15 | Overall financial health: Please complete the below table and answer the following questions.

What is your reserve policy and current reserves status as a percentage of your turnover?

We would expect organisation who are more than three years old to have a minimum of 10% of their annual turnover in reserve.

If you are seeking funding and do not meet this threshold please provide a detailed account of why and what you intend to do to bring your reserves to an adequate level.

Regardless of your reserve position please explain how your organisation is financially viable. |
|---|---|

The below table is copied directly from the organisation's application form

Year	Income	Expenditure	Surplus/deficit
2015/16	£171,567	£159,806	+ £11,761
2016/17	£140,492	£145,996	- £5,504
2017/18	£167,508	£158,495	+ £9,013
2018/19 (anticipated)	£195,000	£179,000	+ £16,000

Score	3
Comments	The organisation is in a relatively healthy position with unrestricted reserves of £20,888 at the end of the 2017/18 financial year. Reserves policy is that MTA will hold a minimum of 3 months expenditure inclusive of direct costs, fees and overheads.
Word count (250)	56

Application Form Question 16	Shared values: Please use this section to demonstrate your commitment to these (London Living Wage, equalities, being Dementia Friendly, ending Modern Slavery and sustainability) and plans to develop these commitments.
Score	4
Comments	The organisation is committed to all of the above and has policies that cover some of the issues
Word count (250)	213

Application Form Question 23	Board Statement: Please include a statement from your Board regarding its overall approach to managing the organisation. This should include the details of the most recent skills audit and how the key posts on the Board are recruited to.
Score	3
Comments	The Chair acts as line manager to the General Manager. This allows regular performance reviews and also oversees management decisions. The Chair keeps the Board regularly informed on relevant or urgent issues and between quarterly meetings

The board is responsible for MTA's long-term development. The board create management strategy and business plans in consultation with the General Manager.

The most recent skills audit took place in June 2018 when recruiting for 3 new board |

	members. This identified a gap around marketing and PR. And the organisation asked for people with these skills to apply when considering joining the board. When vacancies arise, MTA run an open recruitment process and also advertise in line with our Equal Opportunities policy, via as many channels as possible
Word count (250)	246

Has the organisation met all other requirements of the application?		
	Yes	**No**
Does the organisation have a Board of at least 5 with all major posts filled	✓	
Is the organisation currently compliant with filing requirements?	✓	
Does the organisation have a reasonable awareness of opportunities and threats?	✓	
Does the organisation have all the requested documents available?	✓	
Has the organisation attached their accounts for 2017/18 – or most recent set of management accounts if formed after 2017?	✓	
Relevant quality assurance systems in place	✓	
Comments		

Overall comments/Recommendation

 Total score 30: the application is not recommended for funding.

The organisation is well run and delivers excellent activities in the borough. However, Lewisham benefits from a wealth of organisations providing similar activities and it is not possible for the Council to support all of them financially. Difficult decisions have to be made in the context of cuts to the Main Grants budget and other applications have present a more compelling case and broader range of service impacts.