Main Grants Programme 2019 - 2022 Assessment Sheet

Section 1 – Core Information

Name of applicant
Ageing Well in Lewisham

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

Reasons for ineligibility or any further comments
N/A

Is the application for Core or Project funding	Core	X	Project	

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

Annual amount requested
£28945

Application Form Question 25.	Details of any funding from Lewisham Council within the last 3 years?
Current Main Grant Recipient Whitefoot Assembly - £2016 & 2018	

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	2
Comments	The response displays a understanding of the overall theme and provides basic information on general the need relating to isolation and scaling of need over the next 10 years. However the answer is very light on data and evidence. Good explanation of the overall aims of the organisation - but don't state how they relate to organisations delivering similar, demonstrate added value, or how they can complement existing provision. No details given on existing provision from other services, other than some reference to immediate partners and upcoming plans/ideas. The answer does demonstrate an understanding of the benefit of social prescribing and prevention of escalating need and how they are aiming to work within that LBL priority The response also state that accessing transport is an issue and reference current partner but do not provide any detail on they will overcome the issue.
Word count (400)	398

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	Application clearly details the assets within the organisation including staff, buildings, partnerships, volunteers, experience etc and gives examples how this has been effective in continuing to improve. Application states they will work with partners to develop service and avoid duplication. It names a couple of examples, but this is fairly vague and limited to current plans not mobilising future assets Applications does state cross boundary partnerships with South Lewisham GP surgery and NCDP. However this is not remarkable for this sector and is a basic requirement Relative to the amount of funding requested this is a positive answer to question 8 with regards assets, capacity and forward thinking.
Word count (400)	396

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	
	• Aim to keep basic core service until reserves are exhausted.
• Would not expect to develop in any way
• Anticipate only 2 sessions PW and remove events or extra activities
• Would leave existing clients with a reduction in usual service expectation – thus fall off from existing clients
• Will be purely volunteer run and led – issues therefore in recruiting and maintaining volunteers an training – will aim to mitigate through VSL/VAL
• No resources to facilitate other funding as volunteer and board time will focus on delivering a core (basic) 2 session week only
• Likely wind down as charity by 2020

Word count (500)	351

With core funding from Lewisham:

Score	2

Comments	
	• Application makes continual reference to 'continuing their ongoing work inclusion their 5 weekly sessions, collaboration with partners, events and engagement – all this is already taking place – granted with a paid employee.
• Application does state that they will 'continue to recruit new volunteers and participants, but these are limited in scope and ambition and leans towards the tried and ongoing without demonstrating how things could be done differently to ensure success
• Very little detail in how attempts to fundraise, attract grants, retain skilled board members etc. will be improved from the existing status quo if funded again.
• There is no evidence of how the organisation will work differently than they have historically to ensure they achieve the stated outcomes such as increasing grant applications and improving budgetary independence
• Concern here is that this organisation has been struggling to maintain financial health, attract grants, fundraise etc and are proposing to continue doing what they are already doing, which is not yielding results.
• How are they planning to do things differently to improve where necessary? This is not specified, which is a cause for concern

Word count (500)	**452**

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	88 %	
Comments on value for money of revised offers	This represents the core costs of the organisation.	

Application Form Question 11.	User profile – this table is copied directly from the application form	
PROTECTED CHARACTERISTIC	PLEASE TICK	FURTHER DETAIL
Age	x	55 plus
Disability	x	People with mild to moderate physical disabilities and/or dementia
Gender		
Gender reassignment		
Marriage & civil partnership		
Pregnancy & maternity		
Race		
Religion & belief		
Sexual orientation		

Application Form Question 11b	If your proposed programme will be aimed exclusively at one specific community please explain the reasons for this. NB – this could be a community of interest or a geographical area not listed above.
Comments	No Response
Word count (300)	0

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	2
Comments	The application focuses again on existing activities partnerships and continues to reference bringing the basic standard of development for any organisation

they do reference a hope to resume the successful 1-2-1 home visits of the past but are not clear on the detail of how they will make this successful.

The application does not recognise the need to reach out to people with other protected characteristics such as race, gender (engaging isolated men is a particular issue of importance), gender reassignment and sexual orientation which are likely to be factors that contribute to isolation in older age.

The application makes hopeful statements of engagement with hard to reach communities such as working with partners on social prescribing, referrals from other organisations and NCDP, but again shows lack of ambition in stating what assets they can bring to the borough as a leader in accessing and engaging hard to reach groups and individuals.

There is too much reliance on partners bringing clients to them.

Word count (300)	157

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	There are a wide variety of partners listed but the application does not demonstrate how the organisation enhance the partnership as a whole in most cases When working with a professional organisation such as Trinity Laban there is clear evidence that these partnerships are effective and providing excellent value in the community and delivering something out of the ordinary (i.e. opera at Deptford Green School) Undoubtedly some of these partnerships bring value to residents, however without these professional partnerships these activities would be unlikely to continue as the applicants are not the driver in the relationship. The 3 achievements of pride are positive examples focused on the individual benefits achieved by users of the service.
Word count (500)	470

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
12	£43,474	£6009 £16,280 still pending outcome

Number of fundraising activities undertaken in last 3 years	Level of funding achieved
4	£2555

Number of volunteer engagement activity undertaken in last 3 years	Approximate number of volunteer hours delivered
6	2584

Score	2
Comments	There is some activity regarding applications for funding but most are local, or to mainstream givers, very few are successful. There are some larger applications still awaiting a decision. The fundraising activity is extremely limited and sporadic, essentially 1 per year at best. They are stronger on volunteering and volunteering hours. Much of the activity engaging in the activities with attendees is delivered in this way. There is a minimal number of volunteer hours put into office admin – which could be having an impact on funding application bids and outcomes. The organisation is heavily reliant on LBL grant funding.

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	58,425	41,073	17,352
2016/17	36,674	41,434	-4760
2017/18	37,336	35,504	1,832
2018/19 (anticipated)	37,383	30,750	6,633

Score	**2**
Comments	The organisations reserves policy is to keep money available to wind down. They have run at a deficit in 1 of the 3 years. They have a very small surplus but there is no indication that there is a reserve above 10%. The over reliance on the LB Lewisham grant is again a major concern.
Word count (250)	**57**

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	**3**
Comments	The application details their general commitment to equalities, living wage and mentions their activities are dementia friendly There is no reference to tackling modern slavery or sustainability.
Word count (250)	**157**

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	2
Comments	• The Board has 6 people and the key posts are recruited • However the statement only gives a broad overview of the general aptitudes of the members, with no evidence of skills audit and is lacking in detail on what benefit they bring to the organisation • The statement focuses on the general experience and personalities of the board members • There is no mention of how the board recruit board members • There si no evidence of a vision from the board • Although the answer to Q 22 states the board members have been in post 1 year, these are all long standing board representatives, many of whom have been on the board since the organisations inception - as stated in the statement. • Q 21 states a description of the people involved in the organisation, not how many

Word count (250)	203

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	Yes	
Is the organisation currently compliant with filing requirements?	Yes	
Does the organisation have a reasonable awareness of opportunities and threats?	No	
Does the organisation have all the requested documents available?	Yes	
Has the organisation attached their accounts for 2017/18 – or most recent set of management accounts if formed after 2017?	Yes	
Relevant quality assurance systems in place		No (said N/A)
Comments	The main concern in this section is a lack of details on any of the weaknesses, threats or risk. They do recognise their main threat is financial but show lack of understanding of how they can work positively to achieve that financial stability.	

Overall comments/Recommendation

Score 21

A mixed application as the organisation has evidenced some positive delivery and a strong track record in attract volunteers.

However, it is clear that in the past 3 years of main grants funding, and in the years preceding, despite a clear understanding from the organisation that things are changing across the borough and that the organisation needs to change with it there is still a huge over reliance on LB Lewisham funding.

Particular emphasis has been placed on the urgent need for the organisation to diversify their funding streams and fundraising and they have been unable to make any real improvement in that area. They recognise the need but have detail on how they will spread their financial risk

This application suggests the organisation is only prepared to continue the status quo, with a few minor adaptations, which are unlikely to secure them alternative funding in order to remain sustainable in the long term and improve their offer in any way

Although the group work well in partnership, they are very reliant as an organisation from their partners particularly to provide free or low cost venue hire, or to provide professional services for groups such as the singing befrienders as detailed in the application

Many of the Partner organisations may also be undergoing challenging times and may need to adjust their offer. Potentially leading to the end of many of the sessions and activities provided by the applicant – there is no contingency plan should current partnerships dissolve due to circumstances beyond their control such as reduction in their main grant funding.

Overall, while officers appreciate capacity is a major issue behind the inability secure financial sustainability and diversity of the organisation, the applicant does not demonstrate how they will break the deadlock and do things differently than in previous years, in order to achieve success.

Not recommended for funding.