

Main Grants Programme 2019 - 2022 Assessment Sheet

Section 1 – Core Information

Name of applicant
Lewisham Community Transport Scheme

Is the applicant eligible to apply for a main grant	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
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Reasons for ineligibility or any further comments

Is the application for Core or Project funding	Core <input checked="" type="checkbox"/>	Project <input type="checkbox"/>
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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
£75,000

Application Form Question 25.	Details of any funding from Lewisham Council within the last 3 years?
Main Grant	

Section 2 - Deliverables

Application Form Question 7	<p>Tell us the issue you are seeking to address.</p> <p>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.</p>
Score	4
Comments	<p>The applicant is seeking to address isolation through a practical solution which enables older people to undertake their own shopping trips. The application clearly identifies through service user focus groups that existing services in Lewisham are seen by elderly people as unreliable and that this, in turn, reduces their confidence in embarking on shopping trips.</p> <p>The application offers reliability as a key route to giving people the confidence to leave their homes on shopping trips with the knowledge that they will be able to get back – reducing isolation and enabling them to remain active in their communities.</p>
Word count (400)	400

Application Form Question 8	<p>Tell us the assets you will be seeking to engage and mobilise to assist you.</p> <p>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.</p> <p>Tell us the other organisations working in this area and how you will avoid duplication and add value.</p>
Score	2
Comments	<p>The applicant describes accessible vehicles operated by a workforce of local and loyal volunteers. LCTS also generates income through its vehicles by operating them in other boroughs.</p> <p>It is difficult to extrapolate information from the application about how the service will avoid duplication but added value is explained through a fleet management approach which is used by external organisations and which enables LCTS to use external transport to extend its own service.</p> <p>However, the majority of the assets highlighted are essentially internal to the organisation and there is little exploration of wider community assets or partnerships that could be built on to promote the service offer or the sustainability of the organisation.</p>
Word count (400)	400

Application Form Question 9	<p>Please tell us what you will seek to achieve over the next three years both with and without the funding you are applying for.</p> <p>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.</p>
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	<p>Please tell us how your service differs from those that are already delivered or commissioned by the council.</p> <p>You should state the level of funding that you would anticipate attracting during this period both with and without Lewisham's core support.</p> <p>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.'</p> <p>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.</p>
Without core funding from Lewisham:	
Comments	The applicant describes a clear fundraising plan in the event of not attracting Lewisham Main Grants funding. They also intend to participate in wider activities to promote group transport on environmental grounds. The applicant takes a positive approach to the prospect of not receiving Lewisham Council funding.
Word count (500)	269
With core funding from Lewisham:	
Score	3
Comments	The extension of services that would be achieved with success in applying for a Main Grant is clearly definable from the application and enables the organisation to branch into relationships with the local business community and the refugee/migrant community.
Word count (500)	286

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%	<input checked="" type="checkbox"/>
50%	<input type="checkbox"/>
Other	<input type="checkbox"/>
Comments on value for money of revised offers	Although the organisation takes a positive approach to the prospect of not receiving a Main Grant at all, it is less positive about a scaled down grant, suggesting that a 75% award would result in many of the grant award activities not being possible at all.

Application Form Question 11.	User profile – this table is copied directly from the application form		
PROTECTED CHARACTERISTIC	PLEASE TICK	FURTHER DETAIL	
Age	✓	The LCTS transport service is open to all regardless of their particular protected characteristic. Our membership group represent the wide variety of the cultural and social diversity in Lewisham.	
Disability	✓		
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	N/A
Word count (300)	N/A

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	This answer describes some ways in which the service offer will be expanded e.g. with a

	<p>focus on the refugee and migrant community, together with some description of services for other parts of the community such as supporting those with long term sickness who are looking to return to work and older residents.</p> <p>However, there is very limited identification of those who do not traditionally engage with services and what the barriers might be for specific groups. Not a comprehensive response.</p>
Word count (300)	273

Section 3 - Track record, finance and governance

Application Form Question 13	<p>Collaboration and delivery: your track record of working in partnership and delivering quality services.</p> <p>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.</p> <p>Please also details the three service achievements during this period of which you are most proud.</p>
Score	3
Comments	<p>This answer unfortunately references the Access Lewisham partnership with Voluntary Services Lewisham which has recently broken down.</p> <p>A number of the other partnerships appear to be new or nascent but are with a positive range of organisations and there are clearly a few that are relatively long standing.</p> <p>The achievements listed are positive.</p>
Word count (500)	496

Application Form Question 14	<p>Resources: your track record of attracting resources both financial and human.</p> <p>Please complete the below tables detailing your track record of the following over the past three years:</p> <ul style="list-style-type: none"> • funding applications both successful and unsuccessful • other fundraising activities • volunteer engagement <p>Please add extra rows as required.</p> <p>Please use the space below the tables to provide further details as required (200 words max).</p>
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Total number of funding applications in last 3 years	Level of funding requested	Outcome/level of funding received
2	£47,000	0

Number of fundraising activities undertaken in last 3 years	Level of funding achieved
1	£900

Number of volunteer engagement activity undertaken in last 3 years	Approximate number of volunteer hours delivered
Driver and Passenger Assistant five days per week	60-80 hours per week

Score	2
Comments	There appear to have been no funding bids at all made in 2016 and 2017 which is very disappointing.

	<p>Unsuccessful prior applications attributed to high number of competing applications but there have only been two recent applications, one of which was very small.</p> <p>Consistent approach to volunteer involvement which delivers positive results. Some creativity in fundraising activities.</p>
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Application Form Question 15	<p>Overall financial health: Please complete the below table and answer the following questions.</p> <p>What is your reserve policy and current reserves status as a percentage of your turnover?</p> <p>We would expect organisation who are more than three years old to have a minimum of 10% of their annual turnover in reserve.</p> <p>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.</p> <p>Regardless of your reserve position please explain how your organisation is financially viable.</p>
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The below table is copied directly from the organisation's application form

Year	Income	Expenditure	Surplus/deficit
2015/16	£162,832	£160,619	+£2,213
2016/17	£150,931	£149,004	+£1,927
2017/18	£143,154	£141,262	+£1,892
2018/19 (anticipated)	£150,199	£150,089	-£110

Score	2
Comments	<p>LCTS reserve policy is to have 3 months running costs in reserve. However, the organisation's 2017/18 accounts state that current assets stood at £12,234 which does not meet this policy. Further concern is raised about the financial viability of the organisation owing to a significant level of overdraft, which, at the end of the financial year was £8,879, especially given that grants payments are made in advance.</p> <p>No explanation provided as to how the organisation is financially viable, with "ambitious fundraising plan" referenced as organisational approach to becoming more financially independent from Lewisham.</p>
Word count (250)	195

Application Form Question 16	<p>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.</p>
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Score	3
Comments	Response acknowledges all the above issues and how organisation responds to them – in some cases more strongly than others, e.g. understanding of responsibility in relation to modern slavery is incomplete.
Word count (250)	145

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	<p>Brief description provided of approach of Board to managing organisation from a strategic planning perspective. Backgrounds of Board are described but there is no mention of a formal or regular skills audit.</p> <p>Overall the governance of LCTS is a cause for concern. There are currently only 3 board members and two of them were appointed on 1 March 2018. It is unclear what the composition of the board was before this point or the process by which these individuals were recruited</p>
Word count (250)	122

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		X
Is the organisation currently compliant with filing requirements?	X	
Does the organisation have a reasonable awareness of opportunities and threats?	X	
Does the organisation have all the requested documents available?	X	
Has the organisation attached their accounts for 2017/18 – or most recent set of management accounts if formed after 2017?	X	
Relevant quality assurance systems in place	X	
Comments	Threats relate to funding and legislation rather than wider policy or threats that would affect service users.	

Overall comments/Recommendation
<p>Score = 24</p> <p>This is a mixed application with a clear service offer delivering a specific output i.e. transport services.</p> <p>However, the application is internally inconsistent with a positive fundraising vision articulated without any Lewisham funding but a lack of such confidence if in receipt of reduced funding.</p> <p>There are also significant concerns regarding the overall governance structure for the organisation as well as its financial health.</p>

Given that the level of funding requested is unrealistic in the context of an overall budget reduction the fear is that ongoing funding will simply allow the organisation to continue as is with likely financial difficulties in the near future.

As such, given the need to make significant cuts in the overall grants budget, funding is not recommended for LCTS with the expectation that they will need to seek a formal partnership with another organisation in order to provide the governance and infrastructure support required to deliver their fundraising vision.