

Main Grants Programme 2019 - 2022 Assessment Sheet

Section 1 – Core Information

Name of applicant	
Lewisham Pensioners Forum	

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	
x	Strong and cohesive communities
	Communities that care
	Access to advice
	Widening access to sports
	Widening access to sports

Annual amount requested
££68,235 core

Application Form Question 25.	Details of any funding from Lewisham Council within the last 3 years?
<input checked="" type="checkbox"/> Local Assembly Funding	Rushey Green – 2015-2016 – start-up of Ukulele Classes Lewisham Central – November 2018 –Digital Drop-in
<input checked="" type="checkbox"/> Small and Faith Fund	Friendship Quilt Project – October 2018 including two print runs of 5000 flyers
<input checked="" type="checkbox"/> Mayor’s Discretionary Fund	Regular support for Pensioners Day through direct hire of the venue and provision of guest lunch

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	3
Comments	<p>The application references:</p> <ul style="list-style-type: none"> • The theme criteria but lacks detail within it • The need for the specific issues to be addressed • There is some reference to other local provision and has referenced why they do not fulfil the need
Word count (400)	385

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	4
Comments	<ul style="list-style-type: none"> • The application demonstrates a strong awareness of their own internal assets and their position within the sector both locally and across London • The application shows how they link with and assist other organisations such as the save Lewisham Hospital campaign lending weight to local campaigns • They note where they may be possible duplications of offer but demonstrate how they avoid duplication and how the organisation differs enough to provide a particular emphasis • Their application also takes note of where the issue is significant enough in the borough for there to be more than one organisation delivering to fulfil that need
Word count (400)	406

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> <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>
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	<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>
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Without core funding from Lewisham:

Comments	<ul style="list-style-type: none"> • The fundamental risk to the organisation is the loss of key personnel and an office infrastructure and ability to attract other funding • They would reduce their current information based activities, including their open meetings and public events, • they would need to scale back the newsletter to meeting alerts only • they would need to reduce their outreach programme at the Riverdale Centre • they would seek to find new management for their 'activity sessions'
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Word count (500)	471
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With core funding from Lewisham:

Score	3
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Comments	<ul style="list-style-type: none"> • The application talks in detail about work being delivered through the current Main Grant, which would continue if the application is approved. • The application does include an envisioned development for their current programme under communities that care • This part of the application fulfils only some of the theme criteria and are quite internalised in their outlook rather than fulfilling the wider engagement as detailed in the theme criteria • The approach described is very member and user focused -
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Word count (500)	610 – OVER THE LIMIT
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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
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75%	<input type="checkbox"/>	
50%	<input type="checkbox"/>	15% possible a 25% reduction if another grant come through
Other	<input checked="" type="checkbox"/>	

Comments on value for money of revised offers	<ul style="list-style-type: none"> • The application states that • 15% reduction would impact the development of the work and organisation as detailed in 9B • A 25% reduction could be possible if another grant come through but there would be some loss of service delivery • To maintain the current level of work they cannot manage on less than 75% of the bid
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Application Form Question 11.	User profile – this table is copied directly from the application form
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PROTECTED CHARACTERISTIC	PLEASE TICK	FURTHER DETAIL
Age	x	
Disability	x	Incidental to Age
Gender		
Gender reassignment		
Marriage & civil partnership		
Pregnancy & maternity	x	Cafe Pop-in (C2) to be breast-feeding friendly and planned outreach to teenage mothers
Race	x	Have held regular Black History Month events
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	<ul style="list-style-type: none"> • The application demonstrates that although their name implies Pensioners they are broader, and acknowledge the knock non effect their work has on families and therefore people of all ages. They offer support to people aged 55 and over • The application details some intergenerational activities • There is information on how other protected characteristics are supported - but this is through working with the older generation as per their constitution • They state that they feel they have diverse membership and will investigate further to ensure outreach as needed
Word count (300)	292

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	3
Comments	<ul style="list-style-type: none"> • This application has some focus on engaging people with online services and demonstrates a track record of this • The organisation recognises the need to improve the engagement with older people in different ways, but still maintain the need for traditional face to face outreach and printed materials
Word count (300)	323 – OVER WORD LIMIT

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	<ul style="list-style-type: none"> • Although the application details a significant number of partners. Many of these partnerships are one offs, or speakers, general assistance and occasion delivery on behalf of the organisation - rather than fully integrated partnerships, creating, developing and maintaining ongoing projects together • There is shared vision with most 'partners' • This application demonstrates a willingness to collaborate
Word count (500)	542 – Over word limit

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
18	£54.157	£21395 £15000 over 3 years pending answer

Number of fundraising activities undertaken in last 3 years	Level of funding achieved
11	£8027

Number of volunteer engagement activity undertaken in last 3 years	Approximate number of volunteer hours delivered
14	2628

Score	2
Comments	<ul style="list-style-type: none"> • The organisation demonstrates excellent engagement with volunteers • There is little evidence of work to engage with other funders and put in funding applications but there is a focus on main stream givers, local organisations and LBL

	<ul style="list-style-type: none"> For the size of the organisations there should be more grant applications for larger amounts and wider range The organisation has not managed to diversify funding streams and is still heavily reliant on Lewisham and ad hoc grants for particular sessions.
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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	£65,681	£60,970	£4711
2016/17	£45,911	£50,572	(£4661)
2017/18	£50,767	£58,927	(£8160)
2018/19 (anticipated)	£44,000	£50,000	(£6000)

Score	2
Comments	<ul style="list-style-type: none"> The organisation state that the funding cut from LBL has pushed them into deficit for the last 3 years and before, however there has been little success in diversifying their income. They have not stated that they have been applying for large scale funding opportunities to offset the LBL cut in the lead up or after, to fill the gap. Funding successes tend to be small scale <p>Reserve Policy</p> <ul style="list-style-type: none"> The Trustees maintain sufficient reserves to cover the costs of winding up the charity, including staff redundancy and outstanding contractual arrangements. Reserves at the end of March 2018 - £55,112
Word count (250)	280 – OVER THE LIMIT

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 application demonstrates a clear approach and policy on all the issues stated above

Word count (250)	267 – OVER THE LIMIT

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	4
Comments	The board has 10 members and the key positions are filled The board is very committed and the application states that there is expertise on the board in specialist areas The application details a good recruitment policy for trustees and allocate appropriate people to appropriate roles on the board Training opportunities are taken up when needed
Word count (250)	254 – OVER THE LIMIT

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?		
Does the organisation have all the requested documents available?		Blank
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 but aware
Comments	Started Picasso but were unable to complete due to capacity The organisation has included a risk assessment so is aware of upcoming risks to the and has identified opportunities as mentioned in other parts of the application	

Overall comments/Recommendation
<p>SCORE 28</p> <p>The application scores well in some sections but has particular weaknesses, most notably around fundraising and financial stability, which will need to be addressed going forward. However, the application has identified a need and demonstrates an approach to delivering services that meet this need. Overall the activity which are considered to be most positive are the coordination and campaigning elements with the direct service delivery possibly being better delivered by others.</p> <p>In determining the final amount for recommendation officers have considered the quality of a range of applications providing services designed to identify and address barriers to engagement of communities that do not traditionally access services or have a disproportionate representation within particular services.</p> <p>Officers are mindful of the level of funding that has been requested and the range of scaling that the applicants have indicated in terms of their service offer but it has not been possible to distribute funds at the requested level to each organisation due to the number of quality applications in this theme.</p> <p>Therefore officers are recommending a 'flat rate' of £35,000 per annum for services of this nature to ensure a consistent approach to funding. The intention is that these organisations will play a coordination and support role, working within a network of organisations, each giving a lead in relation to their specific expertise and forming part of the overall voluntary and community sector infrastructure offer.</p>

As such it is recommended that the Pensioners Forum is awarded funding of £35,000 per annum to take a lead within the network in relation to issues facing older people.
The range of services and areas of focus are to be agreed ahead of the start of the grant on 1 August 2019.