Main Grants Programme 2019 - 2022
Assessment Sheet

Section 1 – Core Information

Name of applicant
Lewisham Pensioners Forum – Project Application Assessment

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

Reasons for ineligibility or any further comments

Is the application for Core or Project funding	**Core**		**Project**	x

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
£17,750+£1250 start-up plus unknown rent costs - project c£22,000 (£68,235 core – separate form)

Application Form Question 25.	**Details of any funding from Lewisham Council within the last 3 years?**	
√	Local Assembly Funding	Rushey Green – 2015-2016 – start-up of Ukulele Classes Lewisham Central – November 2018 – Digital Drop-in
√	Small and Faith Fund	Friendship Quilt Project – October 2018 including two print runs of 5000 flyers
√	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	**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 issue addressed in the application form is well articulated and the project is clearly a good idea in principle • However there is nothing more than anecdotal evidence of need and success in their application. There is no data, survey information to suggest that this will be a success. • The café the organisation are hoping to replicate has not been running for several years and it is possible that those who once used it have found other places to go they enjoy being at – there is no evidence to suggest it will be well used in the application form • However the facts that these hub are effective in the North and South of the borough are compelling • The need for face to face support is important for older people, although this is not evidenced in the application. • The application references partnership work with other organisations to be involved but this project would only be viable if *every* older persons group are welcome to be a part of it and it is unclear if this is part of the plan. • The application references the loss of Age UK and CAB to Catford and this is a valid argument for the project With regard to evidence of need this application goes no further than suggesting that they think it would be a good idea and it worked historically several years ago. The score for this question is around evidence of need and this is not demonstrated in this part of their application.
Word count (400)	**397**

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	**2**
Comments	• This application does not meet the requirements of the question in this section. • It makes some reference to some of the resources and assets that can be mobilised but vastly underestimates the assets that could be mobilised to make this a success • In order to ensure that the project was a success it would be crucial that it is cross organisation to ensure maximum usage. • This section of the application does not give any detail of the potential meanwhile use opportunities or give any details about conversations with Team Catford. • There is a concern that the project is reliant on meanwhile use that could be very short term and could lead to disappointment if the café is bought back, only to be

	taken away again after a short while. • These risks should be referenced in the asset section of the form as the empty units considered to make the project viable are reliant on the regeneration plans and possibly higher renters pursuing the units. • There is no reference to how the vulnerable people who are to be recruited as staff will be trained and developed – there are obvious partners but these are not referenced which suggests that this possibility has not been considered • Recently in central Catford, cafes have gone out of business. These relationships with local businesses would need to be very carefully nurtured • It is unclear if the management committee, staff and volunteers have any experience of effectively managing a business, health and safety, HR, team development, stock management, food safety, marketing and so on
Word count (400)	**168**

Application Form Question 9b & 17b	**For Project Funding Only**
Are the proposed outputs and outcomes reasonable and do they offer value for money:	
Score	**2**
Comments	• The application does lay out well the plans, achievements and output and references some partners, added value and details the gap in the market • The application does not however give any data substantiating the need • The application makes no mention of sourcing other funds as a way to make it sustainable, which is a major issue when coming to something like this, as taking it away is almost worse than not having it at all. • It is good that the application talks about sugar smart but there is a concern that the food offer is so limited as they are covering the lunch period. • It is also unclear if these greatly subsidised prices would be available for all demographics, as this could put pressure on other local businesses if everyone no matter what age can get a drink and toast for far cheaper than other local cafes who pay full business rates etc. • There is no mention in the application of the availability of toilets facilities and disability facilities. • The outcomes are fairly vague and it is not clear how they directly refer to the theme of Strong Cohesive Communities • The Outputs are very vague and limited in actual measurement. • The application references employing staff with learning and physical disabilities but these are not referenced in the outcomes or outputs, how these people will be recruited and retained, and what the positive outputs and outcomes will be for people joining the team. • There are no clear outputs to measure increased footfall to other businesses or how they will engage with other businesses to improve the vibe. there is no output to measure the amount of volunteering hours or other organisation engaged • There are no outputs detailing how the project will be developed to be sustainable • The application states that Age is the primary characteristic but there is no evidence of how this will be managed, for instance is the age range open to someone over 55 – which is the starting age for members of LPF for subsidised drinks and food, considering many in this group may be in full time employment…the café could be swamped with Lewisham Council staff aged 55 and over – this all needs more thought and more detail
Word Count	

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 ☒ This project is not scalable	
Comments on value for money of revised offers	• This project is only achievable if LPF receive the main grant for their core costs • Without the funding form the Council – the prices would need to go up thus reducing the benefit to older people • There is concern that there is no reference to other funding applications to other funders that will be explored in order to help diversification and sustainability of funds – this is putting a great deal of risk at the door to LBL if this is unsuccessful, and to LPF if they have to return the funds for non-delivery

Application Form Question 11.	User profile – this table is copied directly from the application form	
PROTECTED CHARACTERISTIC	**PLEASE TICK**	**FURTHER DETAIL**
Age	x	
Disability	x	Incidental to Age
Gender		
Gender reassignment	x	If Opening doors take up the offer of the space
Marriage & civil partnership		
Pregnancy & maternity	x	Cafe Pop-in (C2) to be breast-feeding friendly
Race		
Religion & belief	x	
Sexual orientation	x	

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	
Word count (300)	

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	• Aside from the usual channels there is no information of how the organisation will engage with the hard to reach – particularly the isolated who do not engage. • They have just provided a list of people they could work with, not how they will directly engage with the users of these groups • Footfall is important so the location will need to be appropriate to capture that in order to be effective. • There is no mention of the local assemblies of Catford South and Rushey Green, both of whom are active in the community and effectively engage with the age group, there is also no mention of working closely with POSAC, who have an active presence in Catford and have over half of their membership based in Catford.
Word count (300)	**323 – OVER WORD LIMIT**

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	• 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	**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**
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	• 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 • 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.

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	£65,681 (£54,086 :LBL Main Grant – 82%)	£60,970	£4711
2016/17	£45,911 (£38,474 LBL Main Grant – 84%)	£50,572	(£4661)

2017/18	£50,767 (£33,896 LBL Main Grant – 67%)	£58,927	(£8160)
2018/19 (anticipated)	£44,000 (£33,896 LBL Main grant - £75%)	£50,000	(£6000)

Score	**2**
Comments	• 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 • Reserve Policy • 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	2
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

Score – 21

- The project is not at a stage at which it could be recommend funding as there are too many unanswered questions. These include:
- Clarity on appropriate partners
- Expertise around managing a business.
- The required budget is not clear as no unit has been identified or agreed.
- The outputs and outcomes are not robust enough and do not reflect the broader range of criteria under the theme.
- Relationship with other businesses and competing in the marketplace
- There is little or no reference of sources of funding other than Lewisham Council

This project is not recommended for funding.