

# Main Grants Programme 2019 - 2022 Assessment Sheet

## Section 1 – Core Information

Name of applicant
Voluntary Action Lewisham

Is the applicant eligible to apply for a main grant	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
---	---	-----------------------------

Reasons for ineligibility or any further comments

Is the application for Core or Project funding	Core <input checked="" type="checkbox"/>	Project <input type="checkbox"/>
--	--	----------------------------------

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
£200,000

Application Form Question 25.	Details of any funding from Lewisham Council within the last 3 years?
	Commissioned to co-ordinate the CYP Forum.

## Section 2 - Deliverables

<b>Application Form Question 7</b>	<p><b>Tell us the issue you are seeking to address.</b></p> <p><b>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.</b></p>
<b>Score</b>	1
<b>Comments</b>	The application provides little indication of the need that it seeks to address other than a reference to Lewisham being one of the 20% most deprived areas in England and the view that when Council services shrink “it is often local charities, and people themselves, who are left to pick up the pieces”.
<b>Word count (400)</b>	402

<b>Application Form Question 8</b>	<p><b>Tell us the assets you will be seeking to engage and mobilise to assist you.</b></p> <p><b>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.</b></p> <p><b>Tell us the other organisations working in this area and how you will avoid duplication and add value.</b></p>
<b>Score</b>	2
<b>Comments</b>	<p>The application mainly describes the organisations own assets and those that form part of its core work programme. This includes:</p> <ul style="list-style-type: none"> <li>• Member organisations</li> <li>• A network of organisations providing complementary services</li> <li>• Staff expertise</li> <li>• The Mulberry Centre</li> </ul> <p>The application provides no significant insight into wider community assets or assets that could be engaged – no reference to volunteering, local assemblies, local amenity groups, community libraries, social media etc</p>
<b>Word count (400)</b>	375

<b>Application Form Question 9</b>	<p><b>Please tell us what you will seek to achieve over the next three years both with and without the funding you are applying for.</b></p> <p><b>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.</b></p> <p><b>Please tell us how your service differs from those that are already delivered or commissioned by the council.</b></p> <p><b>You should state the level of funding that you would anticipate attracting during this period both with and without Lewisham's core support.</b></p> <p><b>As you are applying for Core Funding this section should set out your ambitions as</b></p>
------------------------------------	---

	<p><b>an organisation and what Lewisham's funding will help you achieve rather than simply what 'we are paying for.'</b></p> <p><b>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.</b></p>
<b>Without core funding from Lewisham:</b>	
<b>Comments</b>	Without core funding the organisation would need to consider a restructure, merger or closing
<b>Word count (500)</b>	290
<b>With core funding from Lewisham:</b>	
<b>Score</b>	3
<b>Comments</b>	<p>The application describes a programme of activities to support 300 organisations and over 1,000 individuals each year. This would include:</p> <ul style="list-style-type: none"> <li>• Advice and support in governance, finance, and start up including confidential advice for Chairs and trustees;</li> <li>• Fundraising support including 1 to 1 advice, 'Meet the Funders' seminars and surgeries</li> <li>• Impact evaluation support.</li> <li>• Advice and guidance for organisations on recruiting and managing volunteers; recruitment of expert volunteers, targeting professionals new to Lewisham and City/Docklands corporates, development of micro-volunteering opportunities and signposting</li> <li>• Convening key user-led networks, and training and supporting local people to lead these, e.g. Children and Young Peoples Forum, a reinvigorated Equalities Forum in partnership with Metro;</li> <li>• Guidance for organisations on campaigning, strategic communications &amp; voice.</li> </ul> <p>The application also describes;</p> <ul style="list-style-type: none"> <li>• an ambition to transform the Mulberry Centre into an attractive, fully accessible community hub providing resources, meeting and training space for networks and organisations</li> <li>• develop a virtual and physical hub sharing latest information, resources and best practice, via a mobile-friendly website, microsites, blogs e-bulletins - exploring and harnessing the full potential of digital to meet the needs of Lewisham's diverse VCSE sector</li> </ul> <p>The application is not particularly ambitious, mostly describing activities that are part of the organisations current work programme. There is an ambitious target around fundraising but no clear strategy for achieving this given very limited success that the organisation has seen in the past 3 years. The vision to develop the Mulberry Centre as a voluntary sector hub is also one that has seen limited success to date.</p>
<b>Word count (500)</b>	528

<b>Application Form Question 10.</b>	<b>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</b>
--------------------------------------	---

75%	<input checked="" type="checkbox"/>
50%	<input type="checkbox"/>
Other	<input type="checkbox"/>
<b>Comments on value for money of revised offers</b>	<p>A 25% cut would result in</p> <ul style="list-style-type: none"> <li>• the volunteering function being cut,</li> <li>• a reduction in senior management resulting in a decrease in capacity to represent and champion the sector, and to generate additional income for services.</li> <li>• reduce the organisations ability to collaborate with Metro to develop equalities work in the borough.</li> </ul>

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	✓	

<b>Application Form Question 12</b>	<p>Please set out how your proposed programme will engage those who do not traditionally access services.</p> <p>This engage should relate to both the protected characteristics but also other groups.</p>
<b>Score</b>	4
<b>Comments</b>	<p>The organisation will:</p> <ul style="list-style-type: none"> <li>• Work across all the borough wards</li> <li>• Establish a formal partnership with the Metro Centre around equalities</li> <li>• Support special interest groups</li> <li>• Prioritise individuals and groups from disadvantaged communities/protected characteristics for in-depth advice and support and start-up services</li> </ul> <p>The application provides a good understanding of groups that may not traditionally access services and puts forward a good partnership approach to addressing this issue</p>
<b>Word count (300)</b>	367

### Section 3 - Track record, finance and governance

<b>Application Form Question 13</b>	<p><b>Collaboration and delivery: your track record of working in partnership and delivering quality services.</b></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>
<b>Score</b>	4
<b>Comments</b>	<p>The application gives good examples of the collaboration that it has engaged in over the past three years and with named organisations which has included:</p> <ul style="list-style-type: none"> <li>• Training activities</li> <li>• In depth organisational support</li> <li>• Fundraising support</li> <li>• Volunteering fairs</li> <li>• Hosting events</li> <li>• Facilitating forums</li> </ul>
<b>Word count (500)</b>	460

<b>Application Form Question 14</b>	<p><b>Resources: your track record of attracting resources both financial and human.</b></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"> <li>• funding applications both successful and unsuccessful</li> <li>• other fundraising activities</li> <li>• volunteer engagement</li> </ul> <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>
-------------------------------------	---

Total number of funding applications in last 3 years	Level of funding requested	Outcome/level of funding received
9	£786,538	£159,000 ( a further £100,000 has been recommended)

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

Number of volunteer engagement activity undertaken in last 3 years	Approximate number of volunteer hours delivered
	987

<b>Score</b>	2
--------------	---

<b>Comments</b>	The number of applications and the level of confirmed funding achieved is small for an organisation of this nature and the ratio of Council funding to external funding is poor  There is also a low level of volunteer engagement.
-----------------	---

<b>Application Form Question 15</b>	<p><b>Overall financial health: Please complete the below table and answer the following questions.</b></p> <p><b>What is your reserve policy and current reserves status as a percentage of your turnover?</b></p> <p><b>We would expect organisation who are more than three years old to have a minimum of 10% of their annual turnover in reserve.</b></p> <p><b>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.</b></p> <p><b>Regardless of your reserve position please explain how your organisation is financially viable.</b></p>
-------------------------------------	--

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

Year	Income	Expenditure	Surplus/deficit
2015/16	£326,608	£324,046	£2,562
2016/17	£329,286	£328,388	£898
2017/18	£322,698	£343,911	(£21,213)
2018/19 (anticipated)	£354,937	£354,937	£0

<b>Score</b>	3
<b>Comments</b>	<p>End of year reserves in 2017/18 were £262,366</p> <p>The organisation is in a healthy financial situation but is heavily dependent on Council funding. Reserves policy is to hold equivalent to at least six to nine months, which seems to be particularly high.</p>
<b>Word count (250)</b>	251

<b>Application Form Question 16</b>	<b>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.</b>
<b>Score</b>	5
<b>Comments</b>	The organisation has a clear commitment to equalities, paying the London Living Wage, sustainability, ending Modern Slavery and is Dementia Friendly
<b>Word count (250)</b>	237

<b>Application Form Question 23</b>	<b>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.</b>
<b>Score</b>	3
<b>Comments</b>	The board is elected by the membership at annual general meetings and meets bimonthly, with a Finance and Staffing Subcommittee meeting quarterly between board meetings.

	<p>Trustee recruitment for key positions includes support from REACH and online advertising, Shortlisted candidates are interviewed by a panel of trustees and references taken up before appointment.</p> <p>A recent trustee skills audit will inform targeted trustee recruitment and learning opportunities offered to existing trustees. A review of the Executive Committee and subcommittee workings is under way, while the company Articles are due for a refresh. In the Spring, trustees will commence a review of VAL's policies and procedures, with professional HR input.</p> <p>The board appears to be in a state of transition with various recent or yet to take place reviews</p>
<b>Word count (250)</b>	130

<b>Has the organisation met all other requirements of the application?</b>		
	<b>Yes</b>	<b>No</b>
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	✓	
<b>Comments</b>	The size of the board would be a concern	

<b>Overall comments/Recommendation</b>
<p>Total score 27</p> <p>The application has some strengths but overall does not present a compelling case for funding. The organisation has not demonstrated local knowledge and insight in its description of Lewisham's needs and assets and its track record in successful fundraising is surprisingly limited, except in supporting the fundraising of other organisations. Ambitions around becoming a core funded organisation are mostly limited to what are part of the organisations current work programme. These issues are particularly concerning in the context of an application to provide a voluntary and community sector infrastructure support service.</p> <p>Officers have assessed the relative strengths and weaknesses of a number of applications from organisations bidding to provide the core components of a voluntary and community sector infrastructure support service. Although the application from Voluntary Action Lewisham has some merits, it is the opinion of officers that it does not provide the best option going forward and is therefore not recommended for funding.</p>