

MEETING: 31/01/2019

Ref: 14932

ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital

Voluntary Action Lewisham

Adv: Claran Rafferty

Base: Lewisham

Amount requested: £100,000

Benefit: Lewisham

Amount recommended: £100,000

The Applicant

Voluntary Action Lewisham (VAL) is a membership charity providing leadership and support to charities, community groups and social enterprises working to enhance the lives of Lewisham residents. It was established in 1967 and aims to maximise the effectiveness of its member organisations, both individually and collectively. Currently it provides a range of training courses and support as well as acting as a voice for the sector within wider forums and with the local authority.

The Application

This application is to continue, for a further two years, a project you first funded in July 2014 (for three years) to improve the evaluation and marketing skills in small charitable organisations in Lewisham (defined as those with turnover of £100,000 or less). The next two years' work – should you support it – would focus more on digital approaches to organisations showing their impact. As with the recent grant the project would provide direct support to a number of local organisations (through one-to-one; group; and peer support) as well as indirect assistance through developing online-based tools and guides.

The Recommendation

Through the original, 3-year- funding VAL has directly supported 30 local organisations and helped scores more through developing online tools. In the next two years it will aim to directly benefit another 14 Lewisham groups and expand scope to support six partnerships. In addition, up to 35 other groups will be able to access training and there will be a learning event/conference for up to 50 organisations. A grant is recommended:

£100,000 over two years (2 x £50,000) for the salary of a p/t (28 hpw) Development Officer and related costs to continue the project improving the evaluation and marketing skills of small organisations in Lewisham.

Funding History

Meeting Date	Decision
14/07/2016	£24,500 towards the development of Lewisham Local as part of the London's Giving initiative.
16/07/2014	£150,000 over three years (3 x £50,000) for the salary of a p/t (28hpw) Development Officer and the operational/delivery costs of a project to improve the evaluation and marketing skills in small organisations in Lewisham.
13/02/2013	Application withdrawn.

Background and detail of proposal

Lewisham as a borough has managed to maintain a significant level of funding to its voluntary sector organisations through recent years of austerity. VAL, as the key local infrastructure body, has been able to work with a sizeable cohort of smaller organisations to help them develop their systems for determining and presenting their impact. In the initial three years of the project (funded by the Trust) good progress has been made with a large number of beneficiaries. A further two years would allow VAL to concentrate on helping groups use digital systems more effectively and to support the same outcomes with organisations which are – or aim to be – working collaboratively or in partnerships.

Financial Information

The free unrestricted reserves shown in the table below do not include £20,000 in each year which is for funds designated for works associated with the organisation's move to new premises. Other designated funds are included as free reserves as they are designated for purposes which could be deemed as non-essential (eg organisational development).

The amount shown for the cost of generating funds is very low and does not include the actual proportion of time spent by the Director on generating income. This has been drawn to the organisation's attention.

Year end as at 31 March	2017 Examined Accounts £	2018 Examined Accounts £	2019 Budget £
Income & expenditure:			
Income	329,286	322,698	354,937
- % of Income confirmed as at Sept 2018	n/a	n/a	92%
Expenditure	(328,388)	(343,911)	(354,937)
Total surplus/(deficit)	898	(21,213)	0
Split between:			
- Restricted surplus/(deficit)	(13,433)	(18,027)	(215)
- Unrestricted surplus/(deficit)	14,331	(3,186)	215
	898	(21,213)	0
Cost of Raising Funds	0	585	500
- % of Income	0.0%	0.2%	0.1%
Total expenditure	328,388	343,911	354,937
Free unrestricted reserves:			
Free unrestricted reserves held at year end	244,381	241,195	221,410
No of months of total expenditure	8.9	8.4	7.5
Reserves policy target	164,194	171,956	177,469
No of months of total expenditure	6.0	6.0	6.0
Free reserves over/(under) target	80,187	69,240	43,942