

MEETING 26/03/2020

Ref: 15545

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Generate Opportunities Ltd****Adv: Samantha Grimmett-Batt****Base: Wandsworth****Benefit: Wandsworth****Amount requested: £107,037****(Revised request: £115,341)****Amount recommended: £117,500****The Applicant**

Generate Opportunities Ltd (GO) is a Wandsworth based charity founded by volunteers almost 50 years ago. It supports more than 150 people with a learning disability each week to develop independence, build community connections, and live their lives in the way they choose. Key workstreams include employment support, outreach relating to learning, lifestyle, and wellbeing, stand-alone health and wellbeing projects, social opportunities and youth services.

**The Application**

GO seeks funding for a project which supports people with a learning disability to run a "speaking up" forum and represent GO at local and national conferences, consultations and networking events. Participants will also influence key decision makers locally, quality check publications, projects and policies, and take part in specialist training. The project will be led by two part time co-ordinators, one with lived experience of a learning disability. The two roles will be equal but with different responsibilities, for example the person with lived experience will be crucial in recruiting and engaging other GO members to attend the forum, whilst the other co-ordinator might take on more administrative and finance functions. The exact division of labour, however, will depend of the skillsets of the individuals recruited.

**The Recommendation**

This project will support participants to have the confidence to express their views and participate meaningfully in their community, engaging with the decisions and choices which effect their lives. It will both influence change and allow members to feel truly heard, sometimes for the first time. The recommendation amount is higher than the request due to an error on the application form and because inflation had not been factored in. Funding is recommended:

***£117,500 over three years (£38,500, £39,000, £40,000) towards the salaries of two Generate Voices Co-ordinators (15HPW each, one Co-ordinator to have lived experience of a learning disability) and associated project running costs.***

**Funding History**

Meeting	Decision
31/10/2012	£90,000 over three years for the costs of the "Generate Growth" project.
28/04/2011	£70,000 over 2 years for a scheme supporting young people with learning difficulties into independent adulthood.

**Background and detail of proposal**

Forum activities will include monthly meetings with guest speakers and role models. The co-ordinator and speaking up participants will plan future agendas and decide which speakers and trainers to invite. They will also develop a plan to increase

understanding of governance and work towards joining the board of trustees. the group will make contact with rights campaigning organisations and engage with local networks. These activities will empower people with a learning disability to influence change and help to navigate and deconstruct barriers so that they can make a full contribution to both society and GO itself.

Members have informed the development of the project/proposal and participated in the assessment process itself. The charity is deeply and genuinely committed to being user led, and to modelling genuine engagement rather than tokenism. The charity has always involved members meaningfully in its activities and recent examples include supporting members to amplify their voices and utilise their lived experience expertise in a user led friendship group and with co-training and consultancy work. Your funding will build on this, allowing a more systematic approach which engages many more participants. It will also allow the charity to find ways to expand its consultative work, for example in commissioned services.

### **Financial Information**

The primary income source is various local authorities and the Department of Work & Pensions. Although predominantly statutory funding, the range of services, grants and contracts is diverse with some unrestricted funding being raised from individuals. The charity only operates funded services. GO constantly sources new income streams and responds proactively to changes. The predicted deficit on restricted funds in 2020 was due to a programme which the charity has traditionally subsidised from unrestricted funds when it is unable to raise full funding. Applications are pending to cover this deficit, but it will be transferred to unrestricted should the funds not be covered by outside sources. The deficit on both restricted funds and unrestricted funds in 2021 is due to a combination of an unexpected increase in the London Living Wage (which will not be covered by the local authority contracts), and some staff restructuring costs, the restricted deficit will be transferred to unrestricted if full funding is not found. The charity has recently undertaken a number of activities to improve, and support the development of, the good financial health of the charity. This has included outsourcing financial functions and training for the management team. Furthermore, additional potential sources of income (one contract and one grant) have been identified for y/e 2021, to offset the deficit.

Year end as at 31 March	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,598,091	1,626,404	1,620,019
- % of Income confirmed as at 11/02/2020	N/A	98%	83%
Expenditure	(1,516,027)	(1,609,875)	(1,632,432)
Total surplus/(deficit)	<b>82,064</b>	<b>16,529</b>	<b>(12,413)</b>
Split between:			
- Restricted surplus/(deficit)	0	(18,472)	(7,499)
- Unrestricted surplus/(deficit)	82,064	35,001	(4,914)
	<b>82,064</b>	<b>16,529</b>	<b>(12,413)</b>
Operating Expenditure (unrestricted)	1,506,041	1,448,760	1,456,312
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	503,639	538,640	526,227
No of months of operating expenditure	4.0	4.5	4.3
Reserves policy target	376,510	362,190	364,078
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	127,129	176,450	162,149