

MEETING 09/05/2013

ANNEX NUMBER: 4

ASSESSMENT CATEGORY - London's Environment

**National Council for Voluntary
Organisations**

Amount requested: £42,500

Amount recommended: £42,500

Ref: 11625

Adv: John Merivale

Base: Islington

Benefit: London-wide

Purpose of grant request: To develop NCVO's 'vulnerable Londoners and climate change' project to reach more voluntary organisations and enable them to contribute to regional policies and plans.

Background

Many of you will be familiar with the work of NCVO, the main umbrella body of the third sector in the UK. It has over 7,000 members, ranging from large, household-name charities through to small, grass roots organisations but also including medium sized and regional bodies. It provides a voice for the third sector, co-ordinates its work, and plays a major role in policy development. It also provides a range of support services for the sector including information, training, publications, networks, events and consultation.

In December 2012, you approved the sum of £50,000, as a Strategic Initiative, towards the due diligence and associated costs of the merger of NCVO with Volunteering England, the national infrastructure body for volunteering that comprises local, accredited Volunteer Centres.

Funding History

You have funded NCVO on several previous occasions: In January 2010 you awarded £40,000 towards a project helping third sector organisations make more effective use of ICT – and that was satisfactorily monitored. In September 2010, you approved a grant of £92,000 over two years, towards a project helping third sector organisations better understand climate change and its implications. This grant was awarded under your policy that allows an organisation to hold a second grant where the work is for environmental education purposes. Monitoring for Year 1 has been good. In January 2013, you awarded an access grant of £50,000 towards work to extend their premises.

Current Application

The request is for continuity over a third year of the project to improve understanding of climate change. With your 2-year grant, NCVO launched an initiative 'Vulnerable People and Climate Change' to take forward the recommendations of the Government's Task Force report on Climate Change and the Third Sector. That report had urged the Third sector to help mobilise Civil Society to tackle climate change and reduce its carbon

footprint. Your support has been for the London element of the project where, in line with the aim to support vulnerable people, NCVO has worked with Voluntary & Community Organisations (VCOs) involved with older people, and the disability and mental health sectors. These have responded by making their own operations more resilient, focusing on carbon reduction efforts, and developing ways to support their own clients in improving their environmental awareness and practice.

VCOs with social missions rightly concentrate on the needs and interests of their beneficiaries. As a result, they tend to see environmental concerns as beyond their remit, or play their part only by reducing their own emissions. There remains a need to expand understanding of the environment – i.e. the natural systems on which we depend – and NCVO's approach allows climate change to be grasped as an essential concern for their beneficiaries' future, rather than as an optional, add-on interest.

Furthermore, the work to date has identified the need for VCOs to forge links and influence other stakeholders on this issue, and thus to help shape policies at local and national levels. NCVO has prepared a programme of workshops and presentations, and has a clear set of indicators to track the success of this work over a third year.

Financial Observations

The financial information at Question 8 of the application form is from NCVO's audited accounts for the year ended 31st March 2012. The operating surplus of £315,000 represents 4.3% of turnover and comprised a surplus on unrestricted funds of £327,000 partially offset by a deficit of £12,000 on restricted activity. The accounts also show that NCVO did incur losses on investments and made a pension provision totalling £347,000, resulting in an overall deficit of £32,000.

During 2011/12, NCVO's trustees calculated a need to hold unrestricted free reserves equating to 3.5 months' worth of total expenditure, in order to maintain core activity during a period of unforeseen difficulty. At 31st March 2012, such free reserves were on target at £2,038,000. Due to NCVO's forecast expenditure increasing in the current year 2013/14 to £10.3m, this holding now represents 2.4 months' worth of total expenditure.

The most recent management accounts for 2012/13 project a deficit of £98,000 (1% of turnover), which comprises a deficit on restricted funds of £91,000 and a deficit on unrestricted activity of £7,000.

The budget for 2013/14 anticipates total income of £9.9m, of which £3.7m (37%) is secured at the time of writing. An overall deficit of £330k is estimated for the year which will be funded from unrestricted free reserves. This would reduce free reserves to £1.7m, equating to 2.0 months' worth of total expenditure, against a policy to hold 3.5 months' worth at £3.0m.

Officer's Appraisal

As one of the most influential leadership bodies, NCVO is well placed to deliver the awareness raising, education and practice models which are necessary for significant behavioural change. This project will be carefully evaluated and the learning widely disseminated, thus maximising the impact of grant for one further year. As is your usual practice, the award of further funding should be conditional on receipt of a satisfactory monitoring report for the final year of the current grant (which is imminent).

Recommendation

£42,500, for a third and final year, for the salary and running costs to develop NCVO's climate change project to reach more voluntary organisations and enable them to contribute to regional policies and plans. The grant is conditional on receipt of a satisfactory monitoring report for the previous grant.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11625

Date Received:

25/01/2013

Programme
Area:

04

1. About your organisation

Name of organisation applying for grant: National Council for Voluntary Organisations	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: Society Building, All Saints Street, London	
Postcode: N1 9RL Is this your home address? No	
Contact person: Ms Hilarie Kerr	Position: Fundraising Officer
Phone: 0207 520 3150	Fax:
E-mail: hilarie.kerr@ncvo-vol.org.uk	
Website: http://www.ncvo-vol.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 225922	
Date organisation established: 03/02/1919	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? London's Environment
Purpose for which funds are requested: (25 words maximum) To develop NCVO's 'vulnerable Londoners and climate change' project to reach more voluntary organisations and enable them to contribute to regional policies and plans.
How much funding is requested? Year 1: £42,500 Year 2: £0 Year 3: £0 Total: £42,500

3. Aims of your organisation

NCVO's vision is of a society in which people are inspired to make a positive difference to their communities. Our aims are to give support and voice to a vibrant third sector. Our core values are:

Independence: NCVO values the independence of the third sector and supports organisations to take their own decisions and actions.

Innovation: NCVO believes that the third sector is innovative in its approach to achieving its goals.

Collaboration: NCVO believes the third sector is strongest when it works together.

Inclusiveness: NCVO values the diversity of the third sector, and of society, and strives to be inclusive in all aspects of its work.

Passion: NCVO believes voluntary action is built on the passion of individuals and communities to make a positive difference.

4. Main activities of your organisation

NCVO has over 10,000 members, representing the full size and scope of civil society in England. Members include large national household name charities, medium sized and regional organisations, plus many small, local "grass roots" community groups. Our work is aimed at improving the level and quality of benefits delivered to people and communities. NCVO supports organisations via a range of projects, events, consultation networks and publications. We meet with members regularly to discuss current issues and ensure NCVO is addressing the sector's needs in a targeted, relevant and cost-effective way. NCVO's networks include a Public Service Delivery Network (over 2,000 subscribers) and a group for Work Programme sub-contractors.

NCVO provides up-to-date relevant information on topics including Finance and Funding, Partnership working, Governance and Leadership, Campaigning, and support on Climate Change. We are also highly active in the public policy arena, working with partners, our members and the wider sector to help shape and improve policies that affect millions of people and the communities in which they live.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
94	36	14	1

6. How do you support your volunteers?

NCVO ensures a volunteer is needed, can be accommodated and supported properly. Roles are formalised with an agreement, and references taken. Induction is provided and end of assignment report made. NCVO reimburses reasonable expenses.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Owned	

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

Year: 2012

Income received from:	£
Voluntary income	1,147,000
Activities for generating funds	1,767,000
Investment income	66,000
Income from charitable activities	4,487,000
Other sources	-74,000
Total Income	7,393,000

Expenditure:	£
Charitable activities	5,887,000
Governance costs	99,000
Cost of generating funds	1,092,000
Other	0
Total Expenditure:	7,078,000
(Deficit)/surplus for the year:	315,000

Asset position at year end:	£
Fixed assets	3,642,000
Investments	1,806,000 1,661,000
Net current assets (liabilities)	566,000 714,000
Long-term liabilities	-3,775,000
*Total A:	2,239,000 2,242,000

Other recognised gains/(losses) (347,000)
Net movement in funds (32,000)

Reserves at year end:	£
Endowment funds	0
Restricted funds	191,000
Unrestricted funds	2,048,000 2,051,000
*Total B:	2,242,000

* Total A and Total B must be the same and should be taken from your balance sheet 2,239,000

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
20%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

NCVO merged with Volunteering England as of 1st January 2013 which has increased the staff and number of Trustees. We are currently undergoing a Restructure which will have the effect of reducing the staff size.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:							
Month/Year:	01/13	Ref:	11398	Grant received:	£50,000	OR application rejected?	No
Month/Year:	11/12	Ref:	11477	Grant received:	£50,000	OR application rejected?	No
Month/Year:	09/10	Ref:	9992	Grant received:	£92,000	OR application rejected?	No

12. Previous funding received

Funding received by your organisation from the following sources during the last THREE years: (i) City of London (other than the City Bridge Trust)(ii) London boroughs (iii) London Councils (formerly ALG) (iv) Health authorities (v) Central government departments (vi) Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:			
	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v) Office for Civil Society and other government departments and agencies	4,135,000	3,395,000	3,334,000
(vi) European Commission ESRC	28,000	64,000	76,000

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last TWO years. List source, years and annual amounts:		
	Year: 2010	Year: 2011
Barings Foundation	57,000	
Joseph Rowntree	10,000	
Dulverton Trust	15,000	
Calouste Gulbenkian		15,000
The Mott Foundation	25,000	

14. What steps is your organisation taking to reduce its carbon footprint?

NCVO's environmental achievements include: Using a green cleaning firm; purchasing green electricity; reducing car parking spaces; 40 bike racks; 0% waste to landfill; Silver level Mayor of London's Green Procurement Code; Annual Conference has been carbon neutral since 2008; 74 solar panels and heat/cooling exchange system installed. We supported Every Action Counts and, with Green Alliance and Global Action Plan, piloted a project with 4 organisations to explore the impact climate change would have on their work and beneficiaries, which led to the first stage of our Vulnerable People and Climate Change Project supported by The City Bridge Trust. We: support VCOs across England to take action on climate change; participate in and promote national Climate Week; provided joint secretariat for Third Sector Task Force on Climate Change, aiming to increase commitment and action on climate change throughout the sector, and are delivering commitments in our current work programme.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

Vulnerable Londoners and Climate Change Project: Year 3 proposal

NCVO has been working with voluntary and community organisations (VCOs) supporting vulnerable people in England since April 2011, to explore how climate change is likely to affect their services and beneficiaries. Half our programme has focused on London, supported by the Trust.

We have had excellent engagement from VCOs and involved over 400 service users and 100 other colleagues, trustees and volunteers. We now wish to develop this national work further.

Need

a. Aligning climate change with social mission

Given the sector's size and reach, all VCOs need to understand the society-wide implications of climate change, and be empowered to play a role. They need to understand how climate change will affect their work and beneficiaries, so that they can become more resilient, and contribute to creating a sustainable future society.

b. Facilitating cross-sector collaboration

VCOs need support to forge links with and influence other stakeholders, inside the sector (with environmental organisations) and with the public sector. This ensures their beneficiaries' interests are addressed, and enables VCOs to contribute to wider climate change responses.

Delivery

Our proposed third year:

Workshops: 12 free one day workshops (six in London)

- for groups of VCOs supporting vulnerable people eg homelessness, anti-poverty, children's organisations
- 8-25 organisations per event
- follow up telephone and email support.

Presentations: 12 introductory presentations (six in London) at sector events

- to increase awareness and promote the workshops
- featuring case studies of previous participants
- inter-active exercise.

Cross-sectoral collaboration: Engagement work with other stakeholders

- to promote the contributions non-environmental VCOs can make, and foster collaboration
- London targets include the London Climate Change Partnership and active local authorities
- Other targets: Transition movement, Low Carbon Communities Network and relevant government departments.

Communications

- development of content at www.ncvo-vol.org.uk/climatechange
- four video case studies
- designed PDF of programme discussion booklet.

Aim

Our outcomes:

1. More VCOs understand how climate change is likely to affect their work, and can respond
2. VCOs help shape and deliver wider responses to climate change
3. Policymakers and environmental VCOs are more aware of the role non-environmental VCOs can play in combatting climate change and view them as stakeholders.

Why NCVO

This extension of our programme will provide seamless support for the voluntary sector on this topic, maintaining momentum and existing relationships.

As the leading national sector umbrella body, expert in policy formation, NCVO can ensure this project continues to make direct links into policy-making.

NCVO continues to lead by example on climate change. Our reach (10,000 plus members alone) will ensure a high profile for this work.

Supporting the environmental education of Londoners

As half of this national programme will be focused on the Capital, we will be working directly with many VCO staff, trustees, volunteers and other stakeholders who will be London residents themselves. In turn, they will be delivering services to and working with hundreds of Londoners, engaging them on climate change issues during their involvement in our project.

Principles of good practice

Involving people: We will support participating VCOs to engage their beneficiaries and colleagues in understanding climate change impacts.

Diversity: This is built into the project through our focus on vulnerable people and we will actively seek diverse groups, offering access costs to enable full participation in our activities.

Volunteers: Many volunteers will participate in our programme as VCO representatives and we will highlight the contribution volunteers are making to climate change.

NCVO's carbon footprint: Reducing our emissions is a priority for NCVO, as described in question 14 of the form.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Ongoing monitoring of both outputs and outcomes will be integrated into the project using NCVO's bespoke, in-house Outcomes System, an indicators based approach. We will monitor specific outputs including: number of organisations attending presentations and workshops; number of stakeholder briefings and attendees; number of other stakeholder events open to VCOs and number of VCOs attending; and number of communication products developed.

We will also monitor outcomes including: number of organisations agreeing they know more about the likely impact of climate change on them and their beneficiaries (an indicator for the Trust's 'knowledge and understanding' programme outcome); number of policy makers and environmental organisations reporting increased awareness of the contribution non-environmental VCOs can make. We will also monitor the number of Trust eco-audits our London participants take up, as an indicator of the programme's third outcome to reduce London's carbon footprint.

17. Beneficiaries

How many people will benefit from the grant per year? 450			
In which local authority is your organisation based? Islington			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) All London Boroughs			
At what address will the activity be located? Activity will be primarily located at our offices in Kings Cross, and at venues to be identified across London.			
What age group will benefit? Adult, over 60, All			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			100
What proportion of the beneficiaries will be disabled people? 10%			

18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary(0.1 Grade A Manager, 1 Grade C Officer, 0.2 Grade E Admin	59,202			59,202
Recruitment	800			800
Conference Attendance	200			200
Travel & Subsistence	3,000			3,000
Phone & Fax	260			260
Photocopying	200			200
Stationery	55			55
Postage	990			990
Catering	3,600			3,600
Venue hire	4,200			4,200
Overhead contribution	18,797			18,797
legal and professional	2,680			2,680
TOTAL	93,984			93,984

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
TOTAL				

What other funders are currently considering the proposal?

Funder	£
We are in discussion with Environment Agency and Defra re contributing to this stage of the project, have a meeting arranged with a potential corporate partner, and are actively seeking other funders.	
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary(0.1 Grade A Manager, 1 Grade C Officer, 0.2 Grade E Admin	29,601			29,601
Recruitment	400			400
Conference Attendance	100			100
Travel & Subsistence	600			600
Phone & Fax	130			130
Photocopying	100			100
Stationery	28			28
Postage	198			198
Catering	1,800			1,800
Venue hire	2,100			2,100
Overhead contribution	6,103			6,103
legal and professional	1,340			1,340
TOTAL	42,500			42,500

20. Funding requested from the Trust (continued)

When will the funding be required? 01/04/2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Web based information will be maintained by NCVO. During the year if there are newly identified needs, we will assess these and look to fulfil the need by seeking funds appropriately.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? N/A

Declaration on behalf of applicant organisation

I, <u>RICHARD WILLIAMS</u> (your name)
am an authorised representative of <u>NATIONAL COUNCIL FOR VOLUNTARY ORGANISATIONS</u> (your organisation)
within which I am <u>DIRECTOR, ENTERPRISE & DEVELOPMENT</u> (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature <u>RR</u> Date <u>29-1-13</u>

Return the completed form to: The City Bridge Trust
City of London
PO Box 270
Guildhall
London EC2P 2EJ

- Please
- do not send this application by fax or e-mail - unless applying online, applications must be posted to the Trust
 - do send the information in the checklist - if items are missing, your application will be returned to you
 - do send only the information in the checklist - if further information is required, we will contact you
 - do ensure you have signed and dated this form - we cannot accept forms which have not been signed and dated
 - do use the correct postage - the completed form and additional materials are likely to exceed 100g in weight