

MEETING: 04/07/2013

Ref: 11743

ASSESSMENT CATEGORY - Strengthening the Third Sector

Volunteer Centre Merton

Adv: Jenny Field

Amount requested: £78,000

Base: Merton

Amount recommended: £78,000

**Benefit: Merton, Croydon,
Bromley and Sutton**

Purpose of grant request: Support for a sub-regional volunteer centre network (South London) to deliver and facilitate a programme of accredited and non-accredited training to volunteers and volunteer involving organisations.

Background

This is a consortium application from the four Volunteer Centres serving the boroughs of Merton, Croydon, Bromley and Sutton. Volunteer Centre Merton (VCM) is the lead agency for this application and it is VCM's information that is provided in questions 1 – 14 of the application form.

The request is for a final two years of funding towards a good practice project which you have funded these volunteer development agencies to deliver during the past three years. The original consortium also comprised volunteer centres in Richmond and Kingston. However, during 2012/13, the Volunteer Centre in Richmond (located within Richmond Council for Voluntary Service) lost its local authority contract to an external provider which means there is, effectively, no longer a volunteer development agency in the borough. In the case of Kingston, each Volunteer Centre has been making its own financial contribution to the good practice project. However, due to the current financial climate, Kingston no longer feels able to do so. Nevertheless, the remaining four boroughs are very keen to continue and build on progress to date and take the project to the next level.

Funding History

You have a funding history with all of the participating volunteer centres. However, during the past three years, none of the individual volunteer centres that comprise the consortium have made applications in their own right. The total amount you have awarded to the consortium over three years is £275,000 with two grants awarded: in October 2009 (£175,000 over 2 years); and in November 2011 (a grant of £100,000).

Current Application

To date, the project has been very successful in helping volunteer involving organisations improve their practice in working with volunteers, through a combination of one to one support and training. In addition, it has organised networking events to enable organisations to share ideas

and best practice, as well as increasing the number of volunteering opportunities available through bulletins, conferences and other events. It is proposed to build on the success so far by developing three strands of work designed to improve the quality of volunteering opportunities and to increase the employability skills of participating volunteers.

- Volunteer Centre Croydon has piloted accredited training for volunteer involving organisations leading to the delivery of the Institute of Leadership and Management VRQ level 3 in Volunteer Management. Over an 18 month period two cohorts of 10 participating organisations have taken part. To date, this has been self-financing, with organisations paying a fee of £850 each. However, this amount is a deterrent for smaller organisations and it is therefore proposed to offer subsidised places to 20 volunteer managers annually across the four boroughs.
- The four volunteer centres have been approached by local businesses wishing to develop their Corporate Social Responsibility (CSR) programmes by offering professional skills to voluntary and community organisations. For example, in Croydon, a large insurance company has provided insurance training to local voluntary groups. Building on this, it is proposed to work with 10 local businesses to deliver training in insurance and legal matters; employment and HR; marketing and communications; customer services; and leadership skills.
- A recent survey of organisations that the project has been working with raised concerns about the "placement readiness" of volunteers and the increasing proportion of volunteers presenting with little or no self-management or work-based skills. To address this, it is proposed to provide volunteers with transferrable skills through a series of workshops covering topics such as preparing for volunteering; workplace; etiquette, CV writing; and dressing for success. Volunteers will be given the opportunity to gain an accredited qualification by completing the ASDAN Education Volunteering Short Course.

Financial Observations

Audited accounts for the year ended 31st March 2012 show a surplus of £16,049 (3.9% of turnover), comprising an unrestricted fund surplus of £16,538, partially offset by a small deficit of £489 on restricted activity.

VCM's reserves policy is to hold free unrestricted reserves equivalent to 3 months' worth of operating costs, which based on current year expenditure equates to £63,438. Free unrestricted reserves at 31st March 2012 were £107,348 representing 5 months' worth of current year expenditure.

Draft accounts for 2012/13 show an overall surplus of £4,040 (1.2% of turnover) comprising a surplus on restricted funds of £4,340 partially offset by a small deficit on unrestricted activity of £300.

The 2013/14 budget shows confirmed income of £197,655 and projects a deficit of £56,099, of which, £35,995 will be charged to restricted funds and the balance of £20,104 to free unrestricted reserves. This will reduce free unrestricted reserves to £86,944, equating to 4.1 months' worth of total expenditure compared to the policy target of 3 months at £63,438. However, the charity advises that fundraising activity will continue during the year, including the application before you today.

Officer's Appraisal

By working together, the centres have been able to achieve economies of scale and uniformity of quality that would not have been possible had they worked in isolation. Whilst 3 years is the maximum time you will fund a particular project or activity, your policies allow you to consider funding for an additional 2 years work which you consider to be of strategic importance. You have taken the view that local infrastructure bodies, such as volunteer centres and councils for voluntary service fulfil this criterion. Reporting on the second year of the grant is due in July 2012, therefore any grant should be conditional on a satisfactory report being provided. At the time of writing this report, the audited accounts provided by Volunteer Centre Merton were unsigned. Any grant should therefore be conditional on a signed copy being provided.

Recommendation

£78,000 over 2 years (£34,500; £43,500) towards a sub-regional consortium of volunteer centres (comprising Merton, Croydon, Bromley and Sutton) delivering a programme of accredited and non-accredited training to volunteers and volunteer-involving organisations, conditional on a satisfactory monitoring report on the previous grant being provided and signed audited accounts for Volunteer Centre Merton for 2012/13.



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)

11743

Date Received:

04/03/13

Programme
Area:

7

1. About your organisation

Name of organisation applying for grant:

Volunteer Centre Merton (VCM)

If the organisation is part of a larger organisation, what is its name?

Address for correspondence

**The Vestry Hall
336-338 London Road
Mitcham
Surrey**

Postcode: **CR4 3UD**

Is this your home address? **No**

Contact person:

Select Title Andy Norrell

Position:

Chief Executive

Phone: **020 8640 7355**

Fax: **020 8646 7449**

E-mail: **andy@volunteercentremerton.org.uk**

Website: **www.volunteercentremerton.org.uk**

Legal status of organisation: **Incorporated Charity**

If registered, please give charity number: **1126945**

Year and month organisation established: **April 1992**

04 APR 2013

Box

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)?

Strengthening the Third Sector

Purpose for which funds are requested: (25 words maximum)

Support for a sub regional volunteer centre network(South London) to deliver and facilitate a programme of accredited and non accredited training to volunteers and volunteer involving organisations

How much funding is requested?

Year 1: £34,500 Year 2: £43,500 Year 3: £

Total: £78,000

3. Aims of your organisation

VCM delivers the six core functions of a Volunteer Centre:

1. Brokerage: To recruit and match volunteers with appropriate opportunities in the local community.
2. Marketing volunteering: To stimulate and encourage local interest in volunteering.
3. Good practice development: To strengthen volunteer management, delivering training and supporting local organisations to achieve 'Investing in Volunteers'.
4. Develop volunteering opportunities: To work in partnership with the statutory, private, voluntary and community sectors to develop local volunteering opportunities for all, and overcome barriers to volunteering.
5. Policy response and campaigning: To lead on campaigns concerning issues and legislation that affect volunteers, and to give volunteering a higher profile in Merton.
6. Strategic development of volunteering: To contribute to strategic partnerships; and play a leading role in the development of the local volunteering infrastructure

4. Main activities of your organisation

Recruitment and Placement programme promotes volunteering and recruits volunteers, offering a placement service to match volunteers with the requirements of organisations.

Good Practice programme provides training, information and support to volunteer-involving organisations, including a project to support sports clubs to involve volunteers.

Youth Action programme engages, recruits, places and supports young people as volunteers, working with local schools and colleges.

The Supported Volunteering programme offers extra support to people with disabilities and mental health problems to enable them to volunteer. including mentoring.

Recruiting and supporting the management of volunteers in Merton Libraries.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
6	3	7	40

6. How do you support your volunteers?

All VCM's volunteers receive an individually tailored programme of support and training, which includes induction, supervision, development, reward and recognition. We were Individual Volunteer Centre Merton volunteers are

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?
Rented	3 years

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	68,690
Activities for generating funds	
Investment income	343
Income from charitable activities	337,294
Other sources	
Total Income	406,327

Expenditure:	£
Charitable activities	385,949
Governance costs	4,329 4,239
Cost of generating funds	
Other	
Total Expenditure	390,278
(Deficit)/surplus for the year:	16,049

Asset position at year end	£
Fixed assets	724
Investments	149,237
Net current assets	151,508
Long-term liabilities	2,271
*Total A	149,961

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Reserves at year end	£
Endowment funds	
Restricted funds	41,889
Unrestricted funds	108,072
*Total B	149,961

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
60%

10. Material changes

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

Following a gradual increase in income and expenditure over several years, VCM has been through a process of consolidation to focus on our delivery of the core functions of a Volunteer Centre, but is maintaining a healthy level of restricted reserves. We have extended our delivery of good practice services over the last 3 years building on the foundation provided by CBT funding in partnership with South London Volunteer Centres.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: -	/ 1996	Ref: G96/2	Grant received: £1000	OR application rejected		<input type="checkbox"/>
Month/Year: Oct	/ 2002	Ref: 2244	Grant received: £57000	OR application rejected		<input checked="" type="checkbox"/>
Month/Year: Sep	/ 2008	Ref: 9592	Grant received: £27500 0	OR application rejected		<input type="checkbox"/>

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: 2010	Year: 2011	Year: 2012
(i) City of London			
(ii) Merton Borough Council	156,711	198,885	181,890
(iii) London Councils	22,900	40,000	14,250
(iv) Health Authorities	10,000	5,000	
(v) Central Government	2,890	3,795	45,144
(vi) Others	38,934	16,056	

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: 2011	Year: 2012
	5,000	5,000
Dorus Trust	10,000	
Wates foundation		

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

VCM is based in Vestry Hall with other voluntary organisations, including Merton Voluntary Service Council. MVSC has taken a lead in establishing 'Every Action Counts' to encourage Merton organisations to reduce, re-use and recycle. At Vestry Hall VCM uses a robust recycling process with specific bins around the building and energy saving systems in place. With the support of MVSC, VCM has drafted its own recycling policy, which will be discussed at our next Management Committee meeting prior to adoption. As an organisation we encourage car share and use of public transport. We have also set our printers to print double sided and have initiated various paper recycling initiatives.

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.

In order to provide the right information, please refer to guidance note 15 before completing this section.

The South London Good Practice (SLGP) project has made good progress towards sustaining the delivery of good practice support for volunteer involving organisations (VIO's) across the South London sub region. In late 2012, a service review was conducted for the Project, which revealed how much organisations valued the networking and training opportunities the project offered. Organisations raised concerns about the "placement readiness" of volunteers and the increasing proportion of volunteers presenting with little or no self-management or work-based skills.

The Proposed Extension Project responds to these concerns by building on our successful approach to organisational development, cementing the method of networking and extending a new approach to Up skilling, Training and Support (NUTS). Working across the boroughs of Bromley, Croydon, Merton and Sutton, the project will deliver skills and capacity building training programmes for both organisations and individual volunteers; developing our approach to volunteer management (including support to obtain Investing in Volunteers accreditation) and volunteer training piloted in Croydon, and introducing Corporate Social Responsibility (CSR) programmes:

1) Accredited Volunteer Management Training: Over 16 months Volunteer Centre Croydon has led delivery of the Institute of Leadership and Management VRQ level 3 in Volunteer Management. Two cohorts (each having 10 participants) have undertaken the 10 week programme and under the NUTS extension project a further two programmes will be delivered each year (benefiting a minimum of 40 local volunteer managers). This course has been self-financing, participants paying a fee of £850 each. Whilst this generates income, the relatively large fee has deterred many volunteer managers from smaller organisations and a subsidised places system will counter this.

2) CSR Programmes: Our Volunteer Centres have been approached by local businesses wishing to develop their CSR programmes and offer staff time on a voluntary basis. In Croydon a large insurance company has delivered insurance training to local third sector organisations and in Merton a number of local retailers, including Debenhams and The Body Shop are supporting training in retail skills. This project will develop a programme of skills related workshops to be delivered across the 4 boroughs to complement and extend the range of workshops developed under the SLGP project. We will work to identify 10 local businesses to deliver the following workshops: Insurance/Legal matters; Employment/HR issues; Marketing and Communications; Customer services; People/Team management. Over the two years we will facilitate 48 CSR workshops (480 participants – minimum of 10 per workshop), across the 4 boroughs. This will enable the participants to benefit from continued professional development and to build new and improved relationship and partnerships with businesses.

3) Up-skilling Volunteers: Through a series of workshop that will offer transferable self - management and work based skills to potential and existing volunteers; such as preparing for volunteering, workplace etiquette, CV writing, dressing for success. Volunteers will be encouraged to undertake a number of workshops to build up their volunteering portfolio/CV and will also be offered the opportunity to gain an accredited qualification by completing the ASDAN Short Volunteering course. All volunteers attending workshops will have a transferable DBS check undertaken (by Volunteer Centre Merton who are an umbrella body) which will speed up the placement process.

The project will require dedicated time for Good Practice Advisers from the 4 Volunteer Centres, matched with time donated by the businesses involved. Each Volunteer Centre is committed to funding a minimum of 1.5 days of time for their Adviser. Additional CBT funding will enable four days each week to be devoted to the new initiatives. Volunteer Centre Merton will continue to facilitate the project over the two years (year one with funding committed through the SLGP project) and all four Volunteer Centres are committed to a cost effective sub-regional approach that will strengthen the Third Sector. By improving skills and knowledge of the individuals working or volunteering for organisations across the 4 boroughs we will be strengthening levels of professionalism within the sector and improving service delivery through volunteering.

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

VCM has set up and maintains all necessary data recording systems. Data is being recorded for purposes of monitoring and evaluating work towards outcomes, in line with CBT reporting requirements. All work planning and target setting is geared towards achieving the agreed outcomes. Advisors' quarterly activity reports are passed to the Project Co-ordinator for recording and reporting purposes. They inform the annual CBT monitoring & evaluation report. Bi-monthly Advisors' meetings, in addition to ensuring consistency across all boroughs, will continue to provide a forum for evaluation of project activities and approaches. Local organisations evaluate the impact of training and support forums on their organisations and complete an annual survey to demonstrate the impact of one to one support. Mutual support spreads resultant learning, effectively making the combined experience of four workers available to each Volunteer involving organisation.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year? **400**

What age group will benefit? **16 -99**

In which local authority is your organisation based?
Merton

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Bromley, Croydon, Merton and Sutton

At what address will the activity be located?

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			

What proportion of the beneficiaries will be disabled people?

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 £
4 Good Practice Advisers(10 days week)	50,000	50,000		100,000
Staff & volunteers travel and expenses	1,000	1,000		2,000
Office Expenses	1,000	1,000		2,000
Advertising and Publicity	1,000	1,000		2,000
Premises/Meetings	3,000	3,000		6,000
Accredited training for Orgs & Vols	17,000	17,000		34,000
Facilitation,management & administration	9,000	9,000		18,000
TOTAL	82,000	82,000		164,000

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
CBT SLGP project	9,000			9,000
Income generated by 4 Volunteer Centres	30,000	30,000		60,000
Charging orgs. for accredited training	8,500	8,500		17,000
TOTAL	47,500	38,500		86,000

What other funders are currently considering the proposal?

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 £
4 Good Practice Advisers(4 days a week)	20,000	20,000		40,000
Staff & volunteers travel and expenses	1,000	1,000		2,000
Office Expenses	1,000	1,000		2,000
Advertising and Publicity	1,000	1,000		2,000
Premises/Meetings	3,000	3,000		6,000
Accredited training for community groups	8,500	8,500		17,000
Facilitation,management & administration		9,000		9,000
TOTAL	34,500	43,500		78,000

20. Funding requested from the Trust (continued)

When will the funding be required? **April 2013 to March 2015**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **Build on foundation of core funding received from 4 Borough Councils to generate income through brokerage projects and the delivery of volunteering services, training and Investing in Volunteers across the 4 boroughs. Continuation of stonger relationships with businesses built on CSR programmes developed over 2 years.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A**

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee

Name: James Banks

Organisation: Greater London Volunteering

Address:

**Suite 24, Delta House
175-177 Borough High Street
London, SE1 1HR**

Tel: 020 7864 1472

E-mail: james@glv.org.uk

Declaration on behalf of applicant organisation

I, **Ian Petherbridge** (your name)

am an authorised representative of

Volunteer Centre Merton (your organisation)

within which I am **Chair** (your position)

To the best of my knowledge, all the information that I have provided in this application form is correct. I fully understand that the City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Signature



Date **27th March 2013**

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

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