

MEETING: 30/10/2013

Ref: 11804

ASSESSMENT CATEGORY - Strengthening the Third Sector

**Richmond Upon Thames Council for
Voluntary Service**

Adv: Joan Millbank

**Amount requested: £150,596
(Revised request: £131,811)**

**Base: Richmond
Benefit: Richmond**

Amount recommended: £131,600

Purpose of grant request: Support voluntary and community sector organisations to improve current evaluation processes and adopt new systems to capture impact and demonstrate the value of their services.

Background

Richmond Council for Voluntary Service (RCVS) is an established infrastructure organisation supporting 800+ voluntary, community and not-for-profit organisations (VCS) operating in Richmond-upon-Thames. A staff team of 15 carry out a range of work within interlinking strands of activity, which include: provision of practical assistance including a design and print service; marketing and communication support; capacity building advice and training; social investment opportunities; provision of sector leadership and voice through representation and heading up initiatives including the local Community Involvement Partnership and Richmond's Children and Young People Strategy Forum.

In 2012 RCVS had to close its well-regarded volunteer centre after it lost the tender to a London-wide organisation. RCVS has subsequently refocused its work, downsized and relocated its office into shared premises where it is a tenant.

Funding History

In 2005 you awarded £70,000 over two years towards a business planning service for small and medium sized charities. Monitoring of the grant was deemed 'very good'. In 2009 RCVS's volunteer centre was one of six South London centres (led by Volunteer Centre Merton) to benefit from a two year grant of £228,600 which you made as a collaborative grant to provide a co-ordinated approach to implementing quality standards. The grant has been satisfactorily monitored.

Current Application

RCVS is seeking a three year grant to support its 'Know your Impact' project. The project will focus on helping Richmond's VCS to develop and embed evaluation mechanisms and learn how to effectively demonstrate the impact and value of its work. Need has been identified through sector surveys. In 2013 its review of local commissioning found that many groups failed to adequately address funders' requirements for measurable outputs and outcomes, nor did they understand the link between

evaluation, service planning and quality assurance. RCVS is also aware that local implementation of the Social Value Act 2013 will require contract providers to evidence wider benefit e.g. economic and/or environmental and/or social factors.

A 21hpw Project Co-ordinator will deliver 'Know Your Impact' through provision of sector training, group events, action-learning sets and bespoke 1:1 sessions. Specialist sessions will be provided by project partners (up to six per annum), for example, Superhighways ICT organisation and Charities Evaluation Service. Good practice guides and web-based resources will complement the direct support provided. The project will focus on attracting small groups and those involved (or needing to be involved) in delivery of commissioned services. In each year up to 100 VCS will attend a training session, 25 will receive bespoke 1:1 support and 12 will join a learning set. 8 case studies will be developed to share learning.

Financial Observations

Audited accounts for the year ended 31 March 2013 show income of £648,833 and a deficit of £120,629 (18.6% of turnover), comprising a deficit of £70,665 on unrestricted funds and £49,964 on restricted funds. The charity advises that the deficit was largely a result of the reduction in core funding from the local authority.

The charity's reserves policy states that the organisation aims to hold an undesignated fund equivalent to 6 months operating costs calculated as £250,000. At 31 March 2013 free unrestricted reserves stood at £240,335 equating to 5.8 months operating costs.

The 2013/14 budget shows total income of £495,076, 98% of which has been confirmed. After projected expenditure of £578,961, a further unrestricted fund deficit of £83,885 is anticipated, this would result in the free unrestricted reserves reducing to £156,450, equivalent to 3.8 months' worth of operating costs. The organisation advises that it is attempting to address the budget deficit, in particular seeking to move to more affordable office accommodation and researching alternative funding opportunities both locally and regionally.

Officer's Appraisal

This project will greatly help the voluntary and community sector (especially smaller organisations) in Richmond to become stronger, plan and deliver better services and demonstrate their value to current and future funders. As such, this application strongly addresses your area of interest under 'Strengthening the Third Sector'. RCVS has a good reputation as a second tier organisation and has demonstrated both competence and leadership in dealing with the impact of recent sector funding cuts. It remains a well-positioned and respected organisation. Since submitting the original application adjustments have been made to project costs and the overall grant request has reduced (see appendix A).

151

The applicant has confirmed that specialist support organisations in receipt of their own City Bridge Trust funding (eg Charities Evaluation Service, The Media Trust) will not charge for their services to the project and thereby avoid and potential for 'double funding'.

Recommendation

£131,600 over three years (£43,800; £42,800; £45,000) towards the salary of a part-time (21hpw) Project Co-ordinator and running costs of the 'Know Your Impact' project.



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)

11804

Date Received:

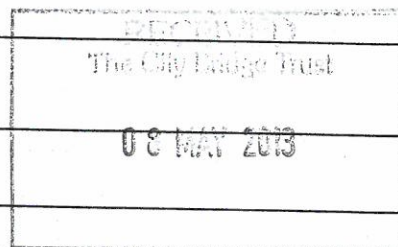
08/05/13

Programme
Area:

7

1. About your organisation

Name of organisation applying for grant: The Richmond Upon Thames Council for Voluntary Service	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence Mortlake Business Centre, 20 Mortlake High Street, London	
Postcode: SW14 8JN	
Is this your home address? No	
Contact person: Mr David Sidonio	Position: Chief Executive
Phone: 0203 178 8785	Fax: n/a
E-mail: davids@richmondcvvs.org.uk	
Website: www.richmondcvvs.org.uk	
Legal status of organisation: Company Limited by Guarantee no: 3730089	
If registered, please give charity number: Charity no: 1075259	
Year and month organisation established: April 1932	



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) Provide support for voluntary & community sector organisations to improve current evaluation processes and adopt new systems to effectively measure and capture the impact and value of their services
How much funding is requested? Year 1: £49,152 Year 2: £49,626 Year 3: £51,818
Total: £150,596

3. Aims of your organisation

Richmond Council for Voluntary Service (RCVS) mission is to support the voluntary sector in the London Borough of Richmond upon Thames by offering:

- Practical Assistance
- A voice through representation, promotion and negotiation
- Leadership in tackling new and unmet needs
- Capacity building skills

Charitable objects - To promote any charitable purposes for the benefit of the community in the London Borough of Richmond upon Thames and neighbouring or adjoining area (hereinafter called "the area of benefit") and in particular the advancement of: education; the furtherance of health; the relief of poverty, distress and sickness.

4. Main activities of your organisation

A staff team of 15 carries out RCVS's activities, which include:

1. Strategic work:

Richmond Partnership; Representation; Health; South London CVS Partnership; Infrastructure Support; Annual Conference; Children & Young People Lead; Community Involvement Partnership; Health & Well-Being Activities

2. Capacity Building:

Governance & Planning; Funding Advice; training, consortia development, community involvement, philanthropic and social investment opportunities and corporate social responsibility programmes

3. Services:

Design & Print; Marketing & Communications; Business Development; Consultation

4. Richmond LINK: Host Contract for the Richmond Local Involvement Network (LINK)

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	11	9	5

6. How do you support your volunteers?

Our internal volunteer policy sets out our commitment that all volunteers are treated equally and are well supported by a named internal contact; receive role descriptions; regular supervisions; relevant training, volunteer expenses and references.

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?
License	3 month renewal agreement

8. Finance

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

Financial year ended - **31** Month: **March**

Year: **2013**

Income received from:	£
Voluntary income	62,665
Activities for generating funds	0
Investment income	1,134
Income from charitable activities	585,034
Other sources	0
Total Income	648,833

Expenditure:	£
Charitable activities	687,669
Governance costs	43,860
Cost of generating funds	37,933
Other	0
Total Expenditure	769,462
Net (Deficit)/Surplus:	(120,629)
Other Recognised Gains/(Losses)	0
Net Movement in Funds	0

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	240,335
Long-term liabilities	0
*Total A	240,335

Reserves at year end	£
Endowment funds	
Restricted funds	
Unrestricted funds	240,335
*Total B	240,335

* 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?
c.25%

10. Material changes

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

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: -	/ 2005	Ref:	Grant received: £46,514	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ 2006	Ref:	Grant received: £51,800	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ 2007	Ref: 6045	Grant received: £70,000	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) London Borough of Richmond	265,679	247,170	209,598
(ii) Heath Road Licencees	46,162	49,922	42,181
(iii) Richmond NHS/LBRuT	95,850	128,850	138,418
(iv) London Councils	53,637	53,637	20,114
(v) Children's Fund	70,000	70,000	-
(vi) Richmond LINK	91,000	106,230	100,001

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
Big Lottery/Wates Foundation	58,417	62,607
Big Lottery Supported Volunteering	58,982	62,472
Imagine	51,635	13,616
Capacity Builders	19,000	-
V+ Project	1,926	-
Grassroots	4,130	-

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

As outlined in our environmental policy (July 2012) we aim to minimise any harm we do to the environment in the course of carrying out our work and where possible to contribute to its improvement and/or protection. Management issues: Purchasing - we ensure that planning and purchasing decisions take account of environmental concerns and that any equipment identified as causing easily avoidable environmental damage is replaced. Energy - We minimise our use of energy and cooperate fully with energy efficiency measured introduced by Citibase who are the managing agents of our property. Transport - We discourage the use of cars by our staff where alternative modes of public transport are available. Meetings arranged by us are sited at points which make the use of public transport an easy option for our members and others. Waste management - We minimise the use of materials and ensure that, as much as possible, the waste we do generate is re-used or recycled using the facilities available at our premises and that any residue is disposed of using methods which cause the least environmental damage. Special collection arrangements are in place for copier or printer toner/ink cartridges and any other supplies where special disposal is recommended.

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.

Richmond Council for Voluntary Service (RCVS) is the right organisation to deliver the 'Know Your Impact' project because we have a strong track record of delivering quality services. Having secured 3 year complementary contracts worth half a million pounds we are sustainable. We can access a wide range of additional resources to add value to this project and can cross-refer between projects using integrated systems to achieve increased breadth, depth and impact. RCVS is an accredited, established infrastructure agency supporting 800+ voluntary, community, social enterprise and not-for-profit organisations (VCO's) in Richmond upon Thames. We are currently delivering a funded, 3 year dedicated skills and sustainability programme of support, and through research have identified significant need for intensive support relating to evaluation and impact measurement.

THE NEED FOR THE PROJECT - Building on an extensive VCO mapping exercise and research in 2011/2012, we recently conducted additional research confirming the top three priorities for VCO's requiring a knowledge of the impact and value of their services and the need to capture and communicate to funders, volunteers and potential partners. Only 18% indicated that monitoring and evaluating performance was a priority. This is because many VCO's do not acknowledge the connection between the two unless it is termed as impact. External research also indicates the need for increased support for the sector to prepare for commissioning and be able to demonstrate the impact of the services they deliver, to a wide variety of stakeholders including funders.

THE TRUST'S THEME - The Know Your Impact project will meet the Trust's theme of strengthening the third sector because it will focus on providing front-line organisations with targeted support to improve the quality of evaluation processes and to adopt new systems that effectively measure and capture the impact and value of their services.

THE PROJECT - We are requesting £150,596 to deliver the project over a three year period.

We will conduct research at the end of year two to identify the need for support services, and if evidenced, plan to appoint a professional fundraiser to identify and apply to appropriate trusts and foundations to secure funding for future services.

DELIVERY - The project will be delivered, monitored and evaluated by a project co-ordinator, recruited for 21 hours per week, with administrative support (job description, salary, NI and pension contribution attached). The project will provide 1:1 sessions and bespoke/intense support depending on the identified need of the VCO. Working with a variety of partners, including ICT specialist Superhighways and the Charities Evaluation Service, we will deliver a comprehensive programme of in-house, and locally delivered, accessible, specialist training in addition to one-to-one support; focus groups and action learning sessions. Direct signposting to relevant additional external resources will also be actively promoted and communicated.

OBJECTIVES - 1. Increase understanding among VCO's of what makes a successful bid 2. Improve the capability of VCO's to monitor and evaluate their work and demonstrate full impact of their services 3. Secure funds to sustain the Sustainability and Skills Programme and Know Your Impact Project beyond year three.

OUTCOMES - 1. Organisations are better able to identify and evaluate higher level qualitative outcomes 2. Organisations have improved methods to embed customer and user feedback in service design and evaluation 3. Organisations have an increased understanding of outcomes, objectives, outputs and other terminology 4. Organisations are better able to evidence and demonstrate outcomes when responding to consultations 5. Organisations have improved ability to link evidencing outcomes to social value or added value

OUTPUTS - 1. 25 VCO's attend one-to-one advice sessions (3 per year) 2. 12 VCO's attend a focus group (2 per year) 3. 12 VCO's attend an action learning set (3 per year) 4/5. 100 VCO's attend a training session - delivered by either the Project Co-ordinator and partners or specialist agencies (12 per year) 6. 8 VCO's produce a 'commissioning journey' case study (4 per year (in years 2 & 3))

RCVS meets the Trust's principles of good practice in all areas (as outlined in the full proposal). *

* on file

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

Using an established diagnostic tool, gaps in skills and knowledge relating to evaluation and impact measurement processes will be identified and, in consultation, an action plan will be drawn-up for each organisation, with appropriate milestones. We will track the impact of the work by using a customised CRM database which is used to monitor all RCVS project delivery:

- Record every contact with all beneficiaries each time an organisation "touches" the service
- Keep robust measurement (including outcomes and outputs) data on organisations from the datum above, using: assessments against organisational action plans; feedback forms; annual specific service surveys; findings from annual independent evaluation; in person; telephone and by email contact to track the "distance travelled" against the action plan.
- Track both number and type of interventions to show the difference each organisation has made against its own tailored package of support.

In addition to analysing the tracking and feedback, support will also be provided to development case studies to demonstrate the impact of the Know Your Impact project and they will be cascaded through relevant communications including the RCVS website.

Participant feedback will demonstrate progress made, and the decreasing reliance on direct support from the programme, leading to greater autonomy and independence for the organisation.

17. Beneficiaries

How many people will benefit from the grant per year? **800+ (including representatives of the 454 registered charities working at a local level)**

In which local authority is your organisation based?
Richmond upon Thames

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Richmond upon Thames

At what address will the activity be located? **Managed from RCVS office - delivered at outreach locations in Richmond**

What age group will benefit? **All age groups**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	73	Black - Caribbean	1
White - Irish	2.1	Black - African	1.9
White - Other (please describe)	9.3	Black - Other (please describe)	0.3
Asian - Indian	3.9	Black - British	26
Asian - Pakistani	1.3	Chinese	1
Asian - Bangladeshi	0.6		
Asian - Other (please describe)	1	Other (please describe)	1.8
Open to everyone			100

What proportion of the beneficiaries will be disabled people?
12.4%

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 £
Project Co-ordinator:salary NI pension	23,786	24,260	24,747	72,793
Administrative Support	4,150	4,300	4,400	12,850
Direct Management costs	5,500	5,600	5,700	16,800
Accommodation	2,730	2,800	2,900	8,430
Travel, staff expenses & training	560	560	560	1,680
Print/Post/Stationery	720	680	650	2,050
IT/Telephone	730	750	775	2,255
Marketing/Promotional Activity	2,500	2,150	2,085	6,735
Consultancy Fees (6 sessions pa @£500)	3,000	3,000	3,000	9,000
Audit/Governance	550	575	600	1,725
General Overheads - rent,rates etc	300	325	350	975
Contribution to management costs	2,106	2,106	2,106	6,318
Exit Strategy Support			1,425	1,425
Meeting room hire costs	2,520	2,520	2,520	7,560
TOTAL	49,152	49,626	51,818	150,596

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?

None

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 £
Project Co-ordinator:salary NI pension	23,786	24,260	24,747	72,793
Administrative Support	4,150	4,300	4,400	12,850
Direct Management costs	5,500	5,600	5,700	16,800
Accommodation & Meeting Room hire costs	5,250	5,320	5,420	15,990
Travel, staff expenses & training	560	560	560	1,680
Print/post/stationery	720	680	650	2,050
IT/Telephone	730	750	775	2,255
Marketing/Promotional Activity	2,500	2,150	2,085	6,735
Consultancy Fees (6 sessions pa @£500)	3,000	3,000	3,000	9,000
Audit/Governance/cont. management costs	2,656	2,681	2,706	8,043
General Overheads - rent, rates etc	300	325	350	975
Exit Strategy Support			1,425	1,425
TOTAL	49,152	49,626	51,818	150,596

20. Funding requested from the Trust (continued)

When will the funding be required? **September 2013**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **Based on an evaluation at the end of year two, and research to identify a need for the development of the service by Voluntary & Community Sector organisations, RCVS will research and plan a schedule of potential funders, and apply for full or part funding to continue the service. In addition, RCVS will continue to deliver charged services as part of the income generation strategy to sustain services.**

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, **David Sidonio** (your name)

am an authorised representative of

Richmond Upon Thames Council for Voluntary Service (your organisation)

within which I am **Chief Executive** (your position)

To the best of my knowledge, all the information that I have provided in this application form is correct

Signature



Date **7th May 2013**

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

ofm

Appendix A -
as amended

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 £
Project Co-ordinator:salary NI pension	23,786	24,260	24,747	72,793
Administrative Support	4,150	4,300	4,400	12,850
Direct Management costs	2,425	2,500	2,550	7,475
Accommodation	2,730	2,800	2,900	8,430
Travel, staff expenses & training	560	560	560	1,680
Print/Post/Stationery	720	680	650	2,050
IT/Telephone	730	750	775	2,255
Marketing/Promotional Activity	2,500	693	700	3,893
Consultancy Fees (6 sessions pa @£500) gm	1,800	1,800	1,800	5,400
Audit/Governance	550	575	600	1,725
General Overheads - rent,r-ates etc	300	325	350	975
Contribution to management costs	1,100	1,100	1,100	3,300
Exit Strategy Support			1,425	1,425
Meeting room hire costs	2,520	2,520	2,520	7,560
TOTAL	43,871	42,863	45,077	131,811

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?

None

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 £
Project Co-ordinator:salary NI pension	23,786	24,260	24,747	72,793
Administrative Support	4,150	4,300	4,400	12,850
Direct Management costs	2,425	2,500	2,550	7,475
Accommodation & Meeting Room hire costs	5,250	5,320	5,420	15,990
Travel, staff expenses & training	560	560	560	1,680
Print/post/stationery	720	680	650	2,050
IT/Telephone	730	750	775	2,255
Marketing/Promotional Activity	2,500	693	700	3,893
Consultancy Fees (6 sessions pa @£500)	1,800	1,800	1,800	5,400
Audit/Governance/cont. management costs	1,650	1,675	1,700	5,025
General Overheads - rent, rates etc	300	325	350	975
Exit Strategy Support			1,425	1,425
TOTAL	43,871	42,863	45,077	131,811