

MEETING: 12/02/2014

Ref: 11974

ASSESSMENT CATEGORY - Strengthening the Third Sector

Evelyn Oldfield Unit

Adv: Karisia Gichuke

Base: Islington

Amount requested: £91,830

Benefit: London-wide

Amount recommended: £92,000

Purpose of grant request: "Founding the Future" will enable BAMER groups to build capacity, deliver & measure quality programmes, engage in cross-sectoral partnerships and give BAMER communities a voice.

Background

The Evelyn Oldfield Unit has developed from its origins in 1994 to become the leading body in London providing 2nd tier programmes and support to refugee and migrant community organisations. Its work has three main strands, firstly, providing a 2nd tier programme of support, information, research, community development and advice, enabling black Asian and minority ethnic (BAMER) groups to build their capacity, get involved in local decision making structures and promote community participation. The second strand ensures people from BAMER communities have opportunities to volunteer, as they are regularly excluded from doing so. Thirdly, the organisation's supporting women programme delivers training and support to groups working with refugee and asylum seeking women who have experienced trauma and violence, enabling them to deliver more effective support and become engaged in strategic partnerships.

Funding History

The Unit has previously had funding from the Trust on two separate occasions. In 2005 a three-year grant of £120,000 was given towards its capacity-building work, and in 2008 a one year grant of £42,000 was given to continue this work. These grants were satisfactorily monitored.

Current Application

The BAMER sector in London is excluded from numerous opportunities for a number of reasons, for example, language and cultural barriers can prevent access to mainstream capacity building. The sector has also been less successful at developing partnerships, meaning it is under-resourced in relation to both funding and personnel, and lacking access to opportunities which could improve the services it delivers. The Unit's research shows more specifically that BAMER groups have a number of needs, from developing community-appropriate services, evaluating their work, issues of governance and sustainability, and packaging and delivering their expertise and skills to others.

The Unit proposes to address these needs through bespoke support, training workshops, seminars, and events for networking and collaboration. The target group will be small third sector organisations working with BAMER communities, and individuals from BAMER communities from all over London, but specifically Islington, Hammersmith and Fulham, Barking and Dagenham and Lambeth. 48 groups will benefit from the project, and 300 individuals will learn new skills through volunteering and access to the services provided by the project.

Financial Observations

Audited accounts for the year ended 31 March 2013 show a surplus of £58,901 (19.5% of turnover) primarily on restricted funds. The charity's reserves policy for 2013-14 is to hold between £30,000 and £45,000 in free unrestricted reserves (1.4-2.1 months' worth of current year expenditure), being sufficient to cover unforeseen events such as winding down, staffing issues and replacing equipment. At 31 March 2013 free unrestricted reserves stood at £65,793, equating to three months' worth of current year budgeted expenditure.

The latest forecast for the current year 2013/14, shows a breakeven position on total income of £258,885, all of which has been secured. The budget for 2014/15 also shows a breakeven position against confirmed income of £215,347. As part of the organisation's strategy, fundraising for additional work remains ongoing, including this application.

Officer's Appraisal

The charity sector has seen considerable shifts from grants to commissioning and BAMER groups do not have the capacity to compete in this environment. There is a need to build understanding of what this entails and for organisations to have the capacity to demonstrate standards to funders. This training will assist organisations to meet these challenges as well as enable better partnership working, which would assist those that have been isolated due to language barriers and capacity issues, better facilitating them to operate inside mainstream networks.

Recommendation

A grant of £92,000 over three years (£31,000; £30,400; £30,600) towards the p/t (17.5 hpw) salary of a Development Worker and running costs of the 'Founding for the Future' project to enable BAMER groups to build capacity; deliver and measure quality programmes; engage in cross-sectoral partnerships; and give BAMER communities a voice.



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)

11974

Date Received:

5 July 13

Programme
Area:

7

1. About your organisation

Name of organisation applying for grant: Evelyn Oldfield Unit	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence Resource for London, 356 Holloway Road, London	
Postcode: N7 6PA Is this your home address? No	
Contact person: Mr Mulat Haregot	Position: Director
Phone: (020) 7697 4101	Fax: (020) 7700 8136
E-mail: mulat@evelynoldfield.co.uk	
Website: www.evelynoldfield.co.uk	
Legal status of organisation: Registered charity If registered, please give charity number: 1044681 Year and month organisation established: June 1994	

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) "Founding the Future" will enable BAMER groups to build capacity, deliver & measure quality programmes, engage in cross-sectoral partnerships and give BAMER communities a voice
How much funding is requested? Year 1: £30,930 Year 2: £30,332 Year 3: £30,569 Total: £91,830

3. Aims of your organisation

The Unit's overarching aim is to provide, develop and co-ordinate specialist aid and support services for BAMER community organisations in order that they will :-

- build capacity to manage their organisations, deliver more effective services and adopt quality assurance practice leading to formal quality mark accreditations
- evidence increased awareness of their communities' needs and conduct strategic planning towards more focused services becoming 'specialists' and moving away from being 'generic'.
- develop partnerships with BAMER, mainstream Voluntary Community Sector (VCS) organisations and statutory bodies to build capacity and strategically develop joined up services
- become more sustainable through effective fund raising, adopting strategies in light of the current economic climate

4. Main activities of your organisation

The Evelyn Oldfield Unit – there are 3 key services provided by the Unit :-

1. The "Community Impact" Project (CIP) which provides a 2nd tier programme of support, information, research, community development and advice enabling BAMER groups to build their capacity, get involved in local decision making structures and promote community participation.
2. "Building the Big Society" ensures people from BAMER communities have opportunities to volunteer from which they are regularly excluded – this project operates through a blend of direct work with people from BAMER communities and 2nd tier programmes supporting BAMER groups which engage them ensuring they receive a professional volunteer experience.
3. "Supporting Women" will develop and deliver a training, support and networking programme to build capacity of 3rd sector / mainstream groups working with refugee & asylum seeking women who have experienced trauma and violence enabling them to deliver more effective support, improve referral and networking skills to become engaged in strategic partnerships.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
3	1	8	25

6. How do you support your volunteers?

Volunteers access our Lottery funded "Building the Big Society" Project which provides professional support to both volunteers and volunteer engaging BAMER groups e.g. training, expenses, supervision, meetings and peer support networks

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	Renewed every three years

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	
Activities for generating funds	
Investment income	44
Income from charitable activities	301,556
Other sources	87
Total Income	301,687

Expenditure:	£
Charitable activities	237,463
Governance costs	5,323
Cost of generating funds	
Other	
Total Expenditure	242,786
Net (Deficit)/Surplus:	58,901
Other Recognised Gains/(Losses)	
Net Movement in Funds	58,901

Asset position at year end	£
Fixed assets	870
Investments	
Net current assets	169,316
Long-term liabilities	
*Total A	170,186

Reserves at year end	£
Endowment funds	
Restricted funds	104,393
Unrestricted funds	65,793
*Total B	170,186

* 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?
0%

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: Apr	/ 2005	Ref: 5552/AW	Grant received: £120,000	OR application rejected	<input type="checkbox"/>
Month/Year: Apr	/ 2008	Ref: 8708/SD	Grant received: £42,000	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	Ref:	Grant received: £	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: 2009	Year: 2010	Year: 2011
(i) N/A			
(ii) N/A			
(iii) N/A			
(iv) N/A			
(v) Capacity Builders Programme	125,000	120,400	125,000
(vi) N/A			

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
BIG Lottery [BASIS]	66,467	129,341
Big Lottery [Reaching Communities]	0	17,919
Trust for London	50,000	33,344
West London Refugee	3,000	0
Castle Finance	3,000	4,000

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

Following on from a green audit by "London Sustainability Exchange", supported by City Bridge Trust, we appointed an Office 'Green Champion' from within our team who has supported the team to change the office culture and take steps to save energy, reduce waste and increase recycling over the past 3 years:

Such steps include encouraging all staff to print less, not use coloured inks, buy recycled products [where affordable], ensure all monitors are turned off at close of the office day and reduce travel by petrol powered vehicles [our staff use public transport when possible]

As a 2nd tier body, we are also encouraging member groups to develop environmental policies and we have dedicated a space on our website to influence membership and enquirers to develop 'green projects'

We have a useful resource bank for groups to promote this message and we are currently working to extend this project.

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 Need – of c60,000 3rd sector groups in London, 600+ are from BAMER communities representing 1% of total voluntary sector, however they remain excluded from many opportunities e.g. cross sectoral partnership development and mainstream capacity building [e.g. from CVS due to language / cultural barriers]. Groups are under-resourced [e.g. funding & personnel] due to lack of capacity and uninvolved in strategic development [due to lack of confidence and communications barriers] – LVSC's Big Squeeze Report found 51% have closed services and 54% expected further closures with many going into dissolution. Their needs include capacity building to (1) evidence and target specific community needs (2) develop appropriate projects, (3) design evaluation systems which embed good practice, measure and demonstrate impact, (4) adhere to effective governance, (5) deliver volunteer programmes and (6) collaborate / develop partnerships.

How we Know – ongoing dialogue with our 150+ member BAMER groups, extensive mapping, research and surveys e.g. Consultation : September 2012, Survey conducted for Comic Relief and dedicated project reporting [January – March 2013].

Project Description – "Founding the Future" will address 7 key spheres :-

1. Leadership Development – to end a 'dependency culture' many BAMER groups have with 2nd tier bodies – developing leaders to promote self sufficiency and sustainability of their groups
2. Providing 'a Voice' for the BAMER Community – development of Forums and other functions which bring communities together and identify / promote their needs
3. Capacity Building – 1-1 consultancy, workshops and training events including Business Planning, Quality Development [e.g. PQASSO] and bid writing to equip / resource BAMER groups.
4. Measurement [Evaluation] – development / adoption of dedicated systems to track progress and evaluate services to measure and demonstrate impact e.g. to funders
5. Research of real needs in the community i.e. how to conduct research – supporting BAMER organisations to conduct group workshops / surveys to research community needs.
6. Partnership & Mergers to build capacity, develop stronger funding bids / contract tenders, influence strategy [have a voice] and promote sustainability
7. Volunteering – enabling BAMER groups to engage more volunteers through promotion of funded / formal programmes ensuring professional conditions for participants.

Outputs / Measurable Targets – include :-

1. 48 BAMER Groups to build capacity via a programme of training and 1-1 consultancy
2. 48 BAMER Groups to develop networks, partnerships and collaborations including cross-sectoral links [16 per year]
3. 48 BAMER Groups to develop volunteer policies and provide opportunities for volunteering
4. 300 individuals from BAMER communities to learn new skills through capacity building, volunteering and access to project spheres [100 per year]

Evelyn Oldfield Unit Capacity – 19 years experience as a specialist provider to BAMER Groups [we exceed all project targets], we are sustainable [secure funding for the foreseeable future and a healthy reserve] and cost effective [2 year organisational development / restructure].

City Bridge Priority – 'Strengthening the 3rd sector – the project will provide capacity building for BAMER groups including (1) support regarding fund raising, governance, planning etc. (2) promoting collaborative work, partnerships and mergers (2) raising standards of volunteer programmes encouraging more people from BAMER communities to volunteer (3) development of improved evaluation systems and methods for conducting project measurement

Principles Of Good Practice – (1) participant organisations will be involved in evaluation / planning of the project e.g. the Board is 100% representative of BAMER communities and we have regular dedicated committees for each EOU project (2) diversity promoted i.e. 130+ members from all BAMER communities, (3) our reports, research and conferences are well known in sharing learning and information (4) we have a formal green policy led by an Office 'Green Champion' and encourage member groups to develop environmental policies which we support.

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

Measurement – dedicated measurement system conducted by the Development Worker supported by the EOU Director, Volunteer Development Worker, volunteers and representatives from project User Groups to develop a team approach and align with accreditations [PQASSO and Investors in People].

Monitoring – monthly monitoring exercises will collate statistical data [working with participant BAMER Groups] including numbers participating / type of activity accessed, demographic profiles, 1-1 analyses e.g. business plans prepared, research exercises conducted, funding bids made and other measures e.g. volunteers recruited / in service after 6 months and workshops / training delivered.

Evaluation – conducted to measure project / CBT outcomes including impact assessment [initial exercise plus 6 – 12 month follow up], feedback from questionnaires / surveys of groups, attendee questionnaires from all training, events and meetings and regular team meetings to evaluate the programme’s impact. External evaluation to review the project, conduct interviews and gain feedback from participants as an objective viewpoint.

17. Beneficiaries

How many people will benefit from the grant per year?

300 individuals via 48 BAMER groups

In which local authority is your organisation based?

London Borough of Islington

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

Pan-London - we have developed a 'Quadrant' approach, therefore we will spend 25% of our time in East, West, North & South London boroughs

At what address will the activity be located? **Resource for London, 356**

Holloway Road, N7 6PA and via outreach

What age group will benefit? **The project is open to all ages achieved by**

targeting BAMER groups as a 2nd tier function

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)	
		All BAMER Communities	100
Open to everyone			

What proportion of the beneficiaries will be disabled people?

10% reflecting the demography of disabled people supported by BAMER groups

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 1, NI & Pension	18,724	19,120	19,523	57,367
Salary 2, NI & Pension	15,242	15,568	15,900	46,710
Revenue Costs [Recruitment, general project revenue, staff travel, training, promotions and consultancy / evaluation]				
Volunteer Programme	4,550	3,574	3,348	11,472
Programme Costs	2,200	2,200	2,200	6,600
Overheads [Calculated at 10% of project]	5,456	5,438	5,497	16,391
TOTAL	60,012	59,816	60,464	180,292

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Big Lottery [Reaching Communities]	29,082	29,484	29,895	88,461
TOTAL	29,082	29,484	29,895	88,461

What other funders are currently considering the proposal?

N/A the project has been planned to operate via 2 matching funders - we have the secure Lottery moneys and we hope this CBT proposal will be supported to enable the project to progress into operations

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 £
Development Worker Salary & Oncosts	18,724	19,120	19,523	57,367
Revenue Costs	4,550	3,574	3,348	11,472
Programme Costs	2,200	2,200	2,200	6,600
Overheads [Full cost recovery]	5,456	5,438	5,497	16,390
TOTAL	30,930	30,332	30,569	91,830

20. Funding requested from the Trust (continued)

When will the funding be required?

1st December 2013 to initiate the project ready for 2014

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **Funder priorities regularly change in response to community / 3rd sector needs – as such, "Founding the Future" will be delivered for 3 years addressing current [identified] needs without plans beyond the term – ongoing evaluation and needs analyses will inform the next phase based upon new evidence identified in practice as community/groups' needs change.**

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

N/A – there are no planning or other consents required for this project which is a revenue based capacity building programme for BAMER groups across London

Declaration on behalf of applicant organisation

I, **Mulat Haregot** (your name)

am an authorised representative of

Evelyn Oldfield Unit (EOU) (your organisation)

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

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

Signature



Date **4th July 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