

MEETING: 12/02/2014

Ref: 12030

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Voluntary Action Westminster

Adv: Tim Wilson

Amount requested: £93,869

Base: Westminster

Benefit: Westminster

Amount recommended: £94,000

Purpose of grant request: To enable VCS groups to understand, monitor and evaluate their impact/successes effectively and to communicate this impact to key stakeholders, including to funders.

Background

Voluntary Action Westminster (VAW) is a borough-based infrastructure organisation, widely recognised for the range of support services it offers voluntary and community organisations. Approximately 80% of Westminster's voluntary sector comprises small, often volunteer-led organisations, and VAW has developed a number of free and low cost support services to meet their needs over the years.

Until recently, VAW had a turnover of almost £2m pa and a staff team of 30. In common with many other London infrastructure organisations, VAW has experienced a worsening fundraising environment, and the charity's income dropped significantly during 2012-13. Whilst the financial position is discussed in more detail below, the key outcome of this period was the maintenance of existing services through operational savings, and the start of merger discussions with the borough's other leading infrastructure organisation (Volunteer Centre Westminster).

You currently fund VAW's *Just for You* service, a training and support programme helping small and medium-sized charities to improve their impact measurement skills. This has been a well-received service and one for which there is continuing need.

Funding History

Since 2000, you have awarded VAW six grants. In 2004 you awarded £100,000 for a capacity building programme and £54,000 for a consortium of Westminster organisations (led by VAW) to assess the feasibility for a voluntary sector hub building. In 2006 you awarded a further £69,360 for VAW to establish a City of London infrastructure service (City.Comm) whilst in 2007 you provided £59,000 for further capacity building services in Westminster. You awarded extension funding for the Westminster services in 2009 with a grant of £64,700. In 2011

you awarded £135,000 towards the current programme, *Just for You*. Reports on the current and previous grants have been consistently good.

Current Application

VAW seeks a further two years' funding for *Just for You*. This is in line with your existing policy to extend funding to projects where there is a strategic benefit to the voluntary sector.

Just for You is delivered by two part-time staff, an Organisational Development Officer and an Information and Communications Officer (both working 2 days per week on the project). Each project round involves the recruitment of 30 participants from 20 voluntary sector organisations who then come together for a three week course delivered at VAW's office and with homework assignments. Following the course, each participant receives one-to-one support back at their own base, where they develop their organisation's monitoring and evaluation plans. The final part of the project round is a series of workshops designed to help participants embed and extend their knowledge. This latter part of the project involves VAW working with a number of delivery partners, and the workshops are open to a wider group of participants beyond the original 30.

The project will run three times a year, meaning that 180 participants will receive intensive benefit. *Just for You* will be promoted through VAW's regular electronic bulletins and networking events. VAW is well networked with voluntary and community organisations within the borough.

Financial Observations

Audited accounts for the year ended 31 March 2013 show a deficit of £349,660 (38% of turnover), comprising deficits of £122,745 on restricted funds and £89,445 on unrestricted funds, together with the use of £137,470 of designated reserves. The deficit is described as being largely due to major refurbishment and restructuring costs.

The charity's reserves policy aims to hold in free unrestricted reserves three months' worth of expenditure (£171k), up to a maximum of £300,000. At 31 March 2013 free unrestricted reserves stood at £136,232, equivalent to 2.4 months' worth of 2013-14 expenditure.

The latest forecast for the current year 2013-14 shows a deficit of £101,541 (17% of turnover), comprising a deficit of £122,094 on unrestricted funds, partly offset by a surplus of £20,553 on restricted funds. The organisation advises that the unrestricted fund deficit is due to the commitment to maintain services from their reserves despite a number of key contracts coming to an end. Total income is expected to be £583,899 and at mid-January 87% was confirmed. Based on the current deficit forecast, the charity would end the year with unrestricted reserves

of £14,138, equivalent to just over 1 weeks' worth of expected 2014-15 expenditure.

The charity's budget for 2014-15 shows a surplus of £20,190 (3% of turnover) comprising a surplus of £65,540 on unrestricted funds and a deficit of £45,350 on restricted funds. Total income is expected to be £665,090 of which £213,600 (32%) has been confirmed, and a further £220,000 (33%) is expected from trading income during the year. The balance of £231,490 (35%) is hoped to be raised from grant applications which are currently pending. Should the forecast unrestricted fund surplus be achieved, this would increase free unrestricted reserves to £79,678 equating to 1.5 months' worth of 2014-15 expenditure.

Officer's Appraisal

VAW has developed *Just for You* into a successful and well-received capacity building service since you awarded your first grant in 2011. The project has targeted smaller voluntary sector organisations, who would otherwise struggle to afford commercial training, and offers a personalised approach that tailors the work to each client's needs. VAW has gathered evidence of the ways client organisations have benefitted from support received through *Just for You* and this includes a number of successful funding applications built on better impact data than would otherwise have been available.

Recommendation

£94,000 over two years (£46,300; £47,700) towards the salary and support costs of an Organisational Development Officer (2 days pw) and an Information and Communications Officer (2 days pw) to deliver Voluntary Action Westminster's *Just for You* programme.

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

12030

Name of your organisation: Voluntary Action Westminster	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Westminster	
Contact person: Ms Emma Plouviez	Position: Organisational Development Officer
Website: http://www.vawcvs.org	
Legal status of organisation: Charitable company	Charity, Charitable Incorporated Company or company number: 1068824
When was your organisation established? 01/06/1965	
<p>Aims of your organisation:</p> <p>VAW is the Council for Voluntary Services in Westminster and aims to support local voluntary and community groups to deliver stronger services and to influence local policies.</p> <p>We want to create a London full of thriving communities served by innovative and sustainable voluntary organisations; a city where all Londoners contribute to improve our civic society.</p> <p>We will tirelessly and passionately share our expertise and connections with people, voluntary organisations, community groups, companies and funders across Westminster and London.</p> <p>Our work is shaped by our core values: innovation; collaboration; inclusivity; learning; inspiration.</p>	
<p>Main activities of your organisation:</p> <p>Our work covers:</p> <p>Organisational development: providing information, advice and training to voluntary and community organisations to develop their effectiveness and financial sustainability.</p> <p>Services in the community: using our experience of community involvement to deliver family outreach services through Children's Centres in South and Central Westminster.</p>	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
3	19	14	2

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	2019

Environmental Impact

City Bridge Trust wants to help voluntary sector organisations to have a positive environmental impact. Please tell us how much your organisation is already doing to have a positive environmental impact using the definitions below to help you decide.

Green champion: We promote environmental excellence through all our activities and raise awareness with users.

Grant Request

Details of grant request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More organisations with improved capabilities in monitoring, evaluation and impact reporting
Please describe the purpose of your funding request in one sentence. To enable VCS groups to understand, monitor and evaluate their impact/successes effectively and to communicate this impact to key stakeholders, including to funders.
When will the funding be required? 01/04/2014
How much funding are you requesting? Year 1: £46,242 Year 2: £47,627 Year 3: £0 Total: £93,869
Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to fund it? Understanding and implementing good practice in impact measurement and reporting remain fundamental to success in grant funded and contracted work within the VCS - so this work will remain fundamental to the organisational development services of VAW. By 2015 VAW intends to retrieve the local VCS support LA contract, and build additional funding onto that.
If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

Summary of grant request

Need: this is an application to extend the project for a further two years. The primary need is based on our understanding of the current situation for the VCS in Westminster and particularly small to medium-sized community groups in Westminster (generally, those with annual income less than £250k, many smaller than that), who report to us that they face increased demand for their services at a time of national and local government cutbacks and much greater competition for funding (VAW annual sector survey 2012).

Delivery: will be enabled through VAW's extensive connection to over 800 voluntary sector organisations in Westminster - members of VAW; small groups who rent premises/desk space at VAW; those who sign up to receive the VAW bi-weekly ebulletin of news and information for the VCS in Westminster.

1. 40 groups will attend 3 X weekly workshops which will enable them to:
 - Create a planning, monitoring and evaluation framework tailored to their organisation's work, to collect evidence about the outcomes of the organisation's work
 - Create a basic communications plan
 - Discover new ways to communicate the organisation's outcomes to funders and other stakeholders.
2. 40 groups will apply to funders using evidence of outcomes that is generated through newly established/reviewed monitoring and evaluation mechanisms.
3. 40 groups will be supported to develop publicity materials, using evidence gained through improved evaluation mechanisms, to promote the value of their service to funders/beneficiaries.
4. Online collaborative learning platform created.
5. 20 more groups will access project support through free training workshops.
6. Online VAW website information with extensive monitoring and evaluating impact resources will be available to all; articles and links in the ebulletin direct groups to these.

Aim to achieve: to strengthen the capacity of voluntary and community groups to measure the impact of their services and to articulate evidence of their success to funders.

Local groups will report an improved ability to evaluate and communicate the impact of their services.

Groups will have improved chances of gaining funding and be more sustainable.

Why right organisation: VAW has been successfully running this project, reporting positive outcomes from participant organisations in better understanding of how to define and meet local need, and of the recording and reporting of outcomes. The project has refined its approach to smaller organisations so that they too can be challenged to 'up their game' in defining their responses to local needs and therefore improve their chances of meeting those needs better and being resourced to continue to do so. There is continued demand for the project's services. We have been invited to join a research project (<http://scalingup-codesign.weebly.com>) developing an online community of practice for local small groups.

This project meets the Trust's theme of 'more organisations with improved capabilities in monitoring, evaluation and impact reporting' by enabling 40 more groups in Westminster to plan, identify, measure and communicate fully their outcomes and impact. We will support groups to use this understanding to improve future service delivery and apply to funders.

Principles of good practice:

- we record the effects of our work on the delivery and new funding of participating organisations and encourage them to share learning and collaborate within and between organisations.
- we collect and act on feedback received through evaluation forms from workshops and events, through focus groups and case studies; we conduct an annual sector survey in Westminster.

- we prioritise groups whose annual income is £0-250k for all our services
- we already have informal links with other similar projects in London-wide CVSs and would like to develop an online community of practice to share resources, ideas etc. if there is interest.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Annual cycle of 3 X three weekly workshops for 15 participants, reaching a total of 40 organisations over 2 years, providing intensive training to develop planning, monitoring and evaluation techniques based around a full understanding of identifying need and reporting impact.

121 follow up support with funding applications and monitoring systems for 40 organisations (20 per year).

121 follow up support with publicity and reporting for 40 organisations (20 per year).

Online shared information platform to facilitate collaborative working.

Online VAW website information with updated monitoring and evaluating impact resources.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Organisations will demonstrate understanding of taught principles, and will have improved ability to evaluate and communicate the impact of their services.

Organisations will have improved chances of gaining funding and be more sustainable.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year?

1,000

In which Greater London borough(s) or areas of London will your beneficiaries live?

Westminster (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

White (including English/ Welsh/ Scottish/ Northern Irish/ British; Irish; Gypsy, Traveller or Irish Traveller; Any other White background)

Mixed/ Multiple ethnic groups (including White and Black Caribbean; White and Black African; White and Asian; Any other Mixed/ Multiple ethnic background)

Asian/ Asian British (including Indian; Pakistani; Bangladeshi; Chinese; Any other Asian background)

Black/ African/ Caribbean/ Black British (including African; Caribbean; Any other Black/ African/ Caribbean background)

If Other ethnic group, please give details: **Arab**

What proportion of the beneficiaries will be disabled people?

1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Staffing costs	30,800	31,724	0	62,524
Direct project costs	3,660	3,769	0	7,429
Office costs	3,069	3,160	0	6,229
Premises costs	4,509	4,644	0	9,153
Management and support costs	4,204	4,330	0	8,534
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	46,242	47,627	0	93,869
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Staffing costs	30,800	31,724	0	62,524
Direct project costs	3,660	3,769	0	7,429
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	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	46,242	47,627	0	93,869
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Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: March	Year: 2013
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Income received from:	£
Voluntary income	0
Activities for generating funds	0
Investment income	2,459
Income from charitable activities	814,944
Other sources	107,062
Total Income:	924,465

Expenditure:	£
Charitable activities	1,254,839
Governance costs	19,286
Cost of generating funds	0
Other	0
Total Expenditure:	1,274,125
Net (deficit)/surplus:	(349,660)
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	(349,660)

Asset position at year end	£
Fixed assets	2,676
Investments	1
Net current assets	171,957
Long-term liabilities	0
*Total Assets (A):	174,634

Reserves at year end	£
Endowment funds	0
Restricted funds	35,725
Unrestricted funds	138,909
*Total Reserves (B):	174,634

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
61-70%

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

Due to a combination of factors VAW downsized in 2012-3 and reported a significant operating deficit, largely due to office refurbishment works and redundancy costs. Since then, the organisation has restructured, stabilised financially, has a new Chief Executive

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2010 £	2011 £	2012 £
City of London (except City Bridge Trust)	62,073	53,093	0
London Local Authorities	159,076	693,709	86,756
London Councils	0	0	0
Health Authorities	0	100,000	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2010 £	2011 £	2012 £
Big Lottery	149,902	166,484	52,421
City Parochial Trust	20,000	20,000	0
CLCH (Central London Community Healthcare)	0	2,428	5,457
	0	0	0
	0	0	0

Declaration

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

Please confirm: Yes Full Name: **Gareth Owen**

Role within **Chief Executive Officer**
Organisation: