

MEETING: 13/03/2014

Ref: 12056

ASSESSMENT CATEGORY - Making London More Inclusive

SHARE Community

Adv: Ciaran Rafferty

Base: Wandsworth

Benefit: Several SW London

Amount requested: £129,282

Amount recommended: £130,000

Purpose of grant request: Enabling people with learning disabilities to "go anywhere, do anything", making the most of London arts, sports, and leisure opportunities for health and wellbeing.

Background

SHARE Community helps learning disabled people across London to reach their potential and achieve their life goals through training, education, employment guidance and personal development. It was established over 40 years ago and, with an annual turnover in the region of £700,000, offers a wide range of training courses and opportunities for disabled people to live more independently and meaningfully within their communities. Currently there are over 100 students registered and attending regularly. As well as its main base close to Clapham Junction it also runs a horticultural project in the grounds of Springfield Hospital in Tooting. The organisation has developed trading/ social enterprise activities in recent years and now operates a successful catering arm as well as the horticulture scheme.

Funding History

You have funded SHARE (an acronym for Self Help Association for Rehabilitation and Employment) on two previous occasions. The first time, in 1997, you awarded £191,232 towards the capital costs of making their premises more accessible (works which are still evident and very valuable); and in 2000 you awarded £93,500 over three years for work supporting independent living. This grant was satisfactorily monitored.

Current Application

SHARE aims to provide for and support the individual both in their employment leisure and their leisure/social needs, with this application focusing on the latter. The aim is to provide individual and group support to enable people to choose and plan their participation in arts, sports and leisure activities. The need for this type of project arose from a survey of the organisation's clients where they were asked, "What would you do if you had the right help to do it?" Responses included joining a Tai Chi class; going to the cinema; joining a gym. As much as anything, however, they wanted to be able to organise things for themselves – so that they could gain self-confidence and practical skills.

The delivery model would centre on recruiting and training volunteer support workers who would provide individual support where it was needed (and for many it always will be needed, to a greater or lesser degree); as well as a development worker who

would co-ordinate the groups and help them organise and arrange outings and events – all the while aiming to increase their skills in these aspects. Within the overall proposal and costings, therefore, funds are sought to pay for part of an existing post of HR Administrator (to manage the volunteer programme) and a new, part-time, post of Development Worker. Other costs requested are for the delivery of the activities programmes as well as external evaluation of the scheme throughout the period of the grant – which will help shape the project through its progression as well as provide valuable impact-analysis for its longer term sustainability.

Financial Observations

Accounts for the year ended 31st March 2013 shows a surplus of £11,255 (1.6% of turnover), comprising £9,777 on unrestricted funds and £1,478 on restricted funds.

The reserves policy states that the organisation has a free unrestricted reserves target holding of £185,932, which equates to 2.7 months' worth of 2014/15 expenditure. At 31st March 2013 free unrestricted reserves stood at £80,166, which equates to 1.2 months' worth of 2014/15 expenditure.

The current year forecast to 31 March 2014 shows a surplus of £291 on unrestricted funds. Total income is projected to be £701,253, of which £516,436 (73.6%) has been confirmed as at December 2013.

The budget for 2014/15 shows a surplus of £22,801 (2.6% of turnover) on unrestricted funds. Total income is anticipated to be £867,629, of which £88,766 (10.2%) has been confirmed as at 29th January 2014; £662,769 is expected from regular trading income, with £106,094 to be raised from grant applications including £43,094 from this application to CBT.

Officer's Appraisal

For many years SHARE Community has been a consistent and valued provider of training and support to people with learning difficulties. It has extensive experience of involving service users in its planning and delivery of services and, as a result, knows what is needed and how. The organisation has highly-developed systems for recruiting, supporting and deploying volunteers and is able to strike a balance between offering people support and ensuring that they have the opportunity to do more for themselves.

Recommendation

£130,000 over three years (£43,000; £43,000; £44,000) towards the salaries of a p/t (17.5 hpw) Development Worker and 17.5 hpw of the HR Administrator, plus running costs of the "Go anywhere, do anything" Project.

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

| | |
|---|---|
| Name of your organisation: SHARE Community | |
| If your organisation is part of a larger organisation, what is its name? | |
| In which London Borough is your organisation based? Wandsworth | |
| Contact person: Ms Annie McDowall | Position: Chief Executive |
| Website: http://www.sharecommunity.org.uk | |
| Legal status of organisation: Registered Charity | Charity, Charitable Incorporated Company or company number: 264894 |
| When was your organisation established? 11/09/1972 | |
| Aims of your organisation: The object for which the SHARE Community is established is "to assist persons of any nationality who are suffering from any form of disablement." Our Mission is to help disabled people across London to reach their potential and achieve their life goals through training, education, employment guidance and personal development. Our Vision is for open and equal access to excellent employment, education, and personal development opportunities for disabled people everywhere. Focusing on ability and people's potential is at the heart of our Values. We believe that everyone is of equal value and has something to offer others. We believe in equal access for all. | |
| Main activities of your organisation: SHARE Community provides training, educational, employment, and personal development programmes for disabled people, including those with long term health conditions, mental health needs, or learning difficulties. We have been making a difference within our community of South West London for forty years. Based within the London Borough of Wandsworth, our programmes include life skills and independent living; basic skills; information technology and computing; horticulture; Getting Ready for Work (GRoW); food hygiene and catering; arts and crafts; and a specialist employment project for people recovering from severe mental ill health. Our horticultural social enterprise, Share Gardening, is developing well. Our new catering enterprise is proving popular with our students and customers. Partnership working includes working with Viridian Housing and Happy Computers to provide computer training to isolated deaf people; linking with Wheels for Wellbeing; and being an active participant in the LSO's community programme. We are about to launch a gardening project with Deaf Viridian residents who have mental health needs. | |

Number of staff

| Full-time: | Part-time: | Management committee members: | Active volunteers: |
|------------|------------|-------------------------------|--------------------|
| 9 | 11 | 13 | 20 |

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? |
|--|--|
| Owned | |

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.

Getting started: We try not to be wasteful and have introduced some simple 'green actions'.

Grant Request

Details of grant request

| |
|---|
| Under which of City Bridge Trust's programmes are you applying? Making London More Inclusive |
| Which of the programme outcome(s) does your application aim to achieve? Disabled people actively taking part in the arts or sport Disabled people reporting increased well-being as a result of taking part in the arts or sport |
| Please describe the purpose of your funding request in one sentence. Enabling people with learning disabilities to "go anywhere, do anything", making the most of London arts, sports, and leisure opportunities for health and wellbeing. |
| When will the funding be required? 03/02/2014 |
| How much funding are you requesting? Year 1: £42,733 Year 2: £42,906 Year 3: £43,643 Total: £129,282 |
| 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? We think that this project will lead to the growth of similar opportunities that will be funded through personal social care budgets, further grants, and corporate support. The group may well want to become self-sustaining, applying for funding in its own right and creating a genuinely user-led organisation. |
| If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached? N/A |

Summary of grant request

This project will enable people with learning difficulties in Wandsworth to choose and plan inclusive arts, sports and leisure activities that will lead to them enjoying more independent and fulfilled lives and making the most of living in London. SHARE works with disabled adults who are aiming to live more independently, preparing for employment, seeking greater inclusion and leisure opportunities, or a mixture of all of these. 88% of our students live in the London Borough of Wandsworth. Our students with learning disabilities tell us that they want support to do more in the community. Responses to the question, what would you do if you had the right help to do it, included joining a Tai Chi class; going to parties; going to the cinema; concerts; joining a gym; going on holiday; going out for a curry. They want to organise things for themselves, with some help from staff and volunteers. We know from work done by organisations elsewhere in the country that when people are able to organise community-based activities they grow in confidence and wellbeing. A great example is the Stay Up Late project in Sussex: <http://stayuplate.org/>. At SHARE, we've had some wonderful evenings out, for example going to the Beautiful Octopus Club when it's at the Royal Festival Hall. People had an enjoyable time, and it was also a learning opportunity. The problem is that we don't currently have the staffing or bank of volunteers that would make this an everyday possibility. But our students are clear: they want more. This project will support SHARE students, friends, and other learning disabled people in the community to organise and take part in inclusive sports, arts, and fun activities. As well as providing recreation, it will contribute towards preparing people for more independent living by building confidence, awareness of personal safety issues, budgeting skills, self-advocacy, and self-management. It augments the community mapping project that's part of our website development, funded by Awards for All.

We will recruit a part-time development worker, who will service a working party of disabled people and help them to make arrangements for outings and events. We will recruit and train a team of volunteers with a wide range of interests who will accompany people with learning disabilities to events and activities that they both enjoy. We will employ a volunteer officer to manage the recruitment, development, and matching of volunteers to students. The students will form an action group and will meet at least fortnightly to plan activities. We anticipate that there will be at least one group activity taking place each week by the end of the first year. We anticipate that individuals will team up with volunteers to follow their own particular interests.

We will recruit and support up to 20 volunteers, all of whom must be screened and checked. Twenty people with learning disabilities will be involved in the first year, rising to 40 by year 3. There will be a minimum of 20 activities in the first year, rising to 35 in year 2 and 45 in year 3. We will compile video and photographic records as well as feedback from those taking part in the events. We will commission a formal evaluation.

This work promotes social inclusion and individual wellbeing, furthering City Bridge Trust's aims by resulting in more disabled people actively taking part in arts or sport; disabled people managing the project; disabled people reporting enhanced wellbeing; and disabled people being supported to live more independently.

We are an Investor In People (Bronze); we have strong governance; and we score highly in our staff, volunteer, and student surveys.

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.

Co-ordination and facilitation of a user-led "Go anywhere, do anything" working group. First step is to recruit the development worker, with user involvement from the start. The working group will meet every week. There will be 20 meetings in the first year (allowing for set-up, breaks and holidays)

Recruitment, development and matching of 20 volunteers to user groups and individuals. Volunteers to be DBS screened and references taken; activity with potential project users is part of the interviewing process; training includes making activities accessible, introduction to self-advocacy, and supporting people with autism.

20 people with learning disabilities take part in 20 outings related to arts, sports and leisure to run over the course of the first year. 35 to be run in year 2 with 30 participants. 45 to be run in year 3 with 40 participants.

Individuals and volunteers are matched for shared interests, and as a result, 20 individuals in the first year, 25 in second year, and 35 in third year, take part in community arts and sports events, accompanied by a volunteer with the same interest.

Evaluation of the project to promote best practice. Report is disseminated and shared through the British Institute for Learning Disability and local forums.

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.

People with learning difficulties are more confident in accessing mainstream arts, sports and leisure events. They're able to manage social situations, navigate the transport system, and take part on an equal basis.

People with learning difficulties lead normal lives, enjoying what London has to offer at the same times and venues as everyone else, and with the lack of constraints such as getting home early.

People with learning difficulties report feeling fitter and happier as a result of their activities on the project. Where appropriate, people's health can be demonstrated to have improved - eg those seeking to lose weight through exercise; people experiencing depression.

People with learning difficulties are able to follow and develop their interests through buddy relationships with others who share their interest. As a result, they feel valued and benefit from companionship.

The learning from this project will help other projects around the country and result in more people with learning disabilities leading independent and inclusive lives.

Who will benefit?

About your beneficiaries

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

40

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

Several SW London (100%)

What age group(s) will benefit?

16-24

25-44

45-64

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

91-100%

Funding required for the project

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

| Expenditure heading | Year 1 | Year 2 | Year 3 | Total |
|------------------------------|---------------|---------------|---------------|----------------|
| Staff costs | 27,348 | 27,895 | 28,453 | 83,696 |
| Volunteer expenses | 3,000 | 3,060 | 3,121 | 9,181 |
| Activity costs | 2,500 | 2,550 | 2,601 | 7,651 |
| Staff and volunteer training | 2,000 | 1,500 | 1,500 | 5,000 |
| Marketing and publicity | 1,500 | 1,500 | 1,000 | 4,000 |
| Travel | 1,000 | 1,000 | 1,000 | 3,000 |
| Evaluation | 1,500 | 1,500 | 2,000 | 5,000 |
| Management and overheads | 3,885 | 3,901 | 3,968 | 11,754 |
| | 0 | 0 | 0 | 0 |
| TOTAL: | 42,733 | 42,906 | 43,643 | 129,282 |

What income has already been raised?

| Source | Year 1 | Year 2 | Year 3 | Total |
|---------------|----------|----------|----------|----------|
| | 0 | 0 | 0 | 0 |
| | 0 | 0 | 0 | 0 |
| TOTAL: | 0 | 0 | 0 | 0 |

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 |
| TOTAL: | 0 | 0 | 0 | 0 |

How much is requested from the Trust?

| Expenditure heading | Year 1 | Year 2 | Year 3 | Total |
|------------------------------|---------------|---------------|---------------|----------------|
| Staff costs | 27,448 | 27,895 | 28,453 | 83,696 |
| Volunteer expenses | 3,000 | 3,060 | 3,121 | 9,181 |
| Activity costs | 2,500 | 2,550 | 2,601 | 7,651 |
| Staff and volunteer training | 2,000 | 1,500 | 1,500 | 5,000 |
| Marketing and publicity | 1,500 | 1,500 | 1,000 | 4,000 |
| Travel | 1,000 | 1,000 | 1,000 | 3,000 |
| Evaluation | 1,500 | 1,500 | 2,000 | 5,000 |
| Management and overheads | 3,885 | 3,901 | 3,968 | 11,754 |
| | 0 | 0 | 0 | 0 |
| TOTAL: | 42,733 | 42,906 | 43,643 | 129,282 |

Finance details

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

| | | |
|-----------------------|---------------------|-------------------|
| Financial year ended: | Month: March | Year: 2013 |
|-----------------------|---------------------|-------------------|

| Income received from: | £ |
|-----------------------------------|----------------|
| Voluntary income | 28,993 |
| Activities for generating funds | 31,690 |
| Investment income | 468 |
| Income from charitable activities | 640,891 |
| Other sources | 0 |
| Total Income: | 702,042 |

| Expenditure: | £ |
|---|----------------|
| Charitable activities | 619,322 |
| Governance costs | 39,837 |
| Cost of generating funds | 31,628 |
| Other | 0 |
| Total Expenditure: | 690,787 |
| Net (deficit)/surplus: | 11,255 |
| Other Recognised Gains/(Losses): | 0 |
| Net Movement in Funds: | 11,255 |

| Asset position at year end | £ |
|----------------------------|----------------|
| Fixed assets | 1,624,901 |
| Investments | 0 |
| Net current assets | 80,166 |
| Long-term liabilities | 1,131,579 |
| *Total Assets (A): | 573,488 |

| Reserves at year end | £ |
|-----------------------------|----------------|
| Endowment funds | 0 |
| Restricted funds | 0 |
| Unrestricted funds | 573,488 |
| *Total Reserves (B): | 573,488 |

* 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?
81-90%

Organisational changes

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

Continued development of our social enterprises will have a longer term positive effect on our service delivery and sustainability. We have a new interim Chair who is fully expected to be elected Chair after our December AGM. Bill Morgan is a Price Waterhouse Coopers partner, strong on governance and strategy, bringing a fresh approach to leadership. Funding is a challenge because of public spending cuts.

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) | 0 | 0 | 0 |
| London Local Authorities | 141,019 | 113,260 | 108,751 |
| London Councils | 101,366 | 14,771 | 0 |
| Health Authorities | 0 | 0 | 0 |
| Central Government departments | 0 | 0 | 65,377 |
| 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 £ |
|-----------------------------|-----------|-----------|-----------|
| Henry Smith Charities | 0 | 46,400 | 0 |
| Thomas J Horne | 5,000 | 5,000 | 5,000 |
| Ian Karten Charitable Trust | 24,427 | 3,040 | 2,620 |
| Lloyds TSB | 0 | 14,333 | 10,000 |
| Wolfson Trust | 0 | 20,000 | 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: **Annie McDowall**

Role within **Chief Executive**
Organisation: