

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Enfield Voluntary Action	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Enfield	
Contact person: Mrs Jo Ikhelef	Position: Development & Funding Advice Manager
Website: http://www.enfieldva.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1077857
When was your organisation established? 02/01/1991	
Aims of your organisation: "the promotion of any charitable purposes for the benefit of the community in the Borough of Enfield and in particular the advancement of education, the protection of health and the relief of poverty, distress and sickness the promotion and organisation of co-operation in the achievement of the above purposes and to that end to bring together representatives of the statutory authorities and voluntary organisations engaged in the furtherance of the above purposes within the Borough of Enfield"	
Main activities of your organisation: EVA aims to help local voluntary and community organisations become sustainable organisations enabling them to provide services to residents with diverse needs across Enfield. Membership, News and Social Media: EVA maintains a 500+ database of organisations receiving information from EVA via post, email and EVA's website. Community Accountancy Service (ECAS) provides practical financial and budgeting skills training and one-to-one support; as well as supporting the implementation of good financial management , thus contributing to more sustainable and effective services to Enfield residents. Development and Funding Advice Service (DFAS) enables EVA to provide relevant and targeted training and one-to-one support which aims to build the capacity, strength and sustainability of groups in Enfield's voluntary and community sector. Volunteer Centre Enfield (VCE) encourages and supports good practice in volunteer management; provides training, one to one appointments, and advice and information to local residents who are interested in volunteering.	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
4	4	6	4

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	6 years

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.

Making progress: We have reviewed our organisation's environmental impact and have started to carry out a plan of improvements.

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 skills in financial management More organisations with improved capabilities in monitoring, evaluation and impact reporting
Please describe the purpose of your funding request in one sentence. To improve the financial management skills and the capabilities in monitoring, evaluation and impact reporting for Voluntary and Community Organisations in Enfield.
When will the funding be required? 01/08/2014
How much funding are you requesting? Year 1: £58,273 Year 2: £59,026 Year 3: £59,785 Total: £177,084
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? This grant will demonstrate our commitment to the delivery of high quality services to our stakeholders and provide match funding for local authority and trust funding. EVA has designed this project to be sustainable by investing in community groups, including social enterprises, which will be able to build training and development into their future budgets.
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

The need for the project

There has been an increase in the demand for improving financial management skills from existing and emerging organisations with limited financial skills due to;

- Poor retention of finance volunteers
- Organisations still using manual bookkeeping systems on paper
- Little understanding of Full Cost Recovery
- Lack of audit trail causing problems with funders

Financial management support has become more complex with the introduction of;

- Corporation tax for CICs
- Online reporting for regulators
- Real Time Information (RTI) for all employers

For EVA development staff this means more time spent on providing information on and explaining legal and more complex tax implications and different trading types.

There has been an increase in the demand for improving capabilities in monitoring, evaluation and impact reporting from:

- Funding cuts and high competition for grants have brought new VCOs to seeking advice regarding evidence of the need, and support with indicators to measure outcomes
- Volunteers provide valuable resources for VCOs but often their impact is not recorded, reported or recognised
- Many VCOs have provided excellent quality services for years, but a lack of skills and knowledge in finding a systematic approach to demonstrating outcomes leaves them unable to make the case for continued and/or future funding

Reflecting our experience in Enfield, the "Monitoring and Evaluation" area was identified as the weakest area with the most improvements required for PQASSO awards, for the majority of VCOs at a recent PQASSO reviewers/assessors event (05/12/13).

How the work will be delivered

A Community Accountant (36hrs/week) and Development & Funding Advice Manager (31hrs/week) will provide one-to-one advice and 24 training courses over 3 years covering the areas 'Managing Money' and 'Monitoring and Evaluation' based PQASSO as a framework to move 100 organisations each towards achieving these PQASSO areas. Examples include;

Managing Money

- Problems solving and guidance on HMRC requirements
- Assistance with setting a realistic annual budget with forecasts
- Guidance with written procedures for handling and banking income, payroll, petty cash, and expenses
- Drafting financial sections of strategy documents
- Empowering volunteers to manage financial operations

Monitoring and Evaluation

- Guidance understanding how to identify, collect and use effective monitoring information
- Workshops and training on methods of monitoring, reviewing and evaluation
- Support with impact reporting using qualitative and quantitative information and analyses
- Reviewing performance, quality standards, and publicising evaluation reports

What your project will aim to achieve

We aim to improve financial management skills to enable organisations to work towards achieving the Managing Money area of PQASSO at level 1 or level 2;

We aim to improve capabilities in monitoring, evaluation and impact reporting to enable organisations to work towards achieving the Monitoring and Evaluation area of PQASSO at level 1 or level 2;

Why you are the right organisation

The 2 development staff are PQASSO Peer Reviewers and have 16 years experience working in Enfield's voluntary sector. EVA has built trust and long lasting relationships with the local communities over the past 22 years.

Meeting the Trust's programme outcome under which you are applying

100 organisations will have improved skills in financial management.

100 organisations will have improved capabilities in monitoring, evaluation and impact reporting.

The Trust's 'Principles of Good Practice'

An annual survey will complement regular feedback, which will enable us to track the benefits of our service and make improvements. This project is designed to accommodate small, less well-resourced organisations with targeted outreach at accessible times, suitable/ changing locations and entry level activities. Our learning will be shared via our partnership networks, EVA website, Twitter and Facebook.

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.

70 organisations supported through one-to-one advice by a Community Accountant on basic financial management skills over 3 years. Basic financial skills relates to the level one indicators of 'Managing Money' in PQASSO.

30 organisations supported through one-to-one advice by a Community Accountant on advanced financial management skills over 3 years. Advanced financial skills relates to the level two indicators of 'Managing Money' in PQASSO.

70 organisations supported through one-to-one advice by the Development & Funding Advice Manager on basic monitoring, evaluation and impact reporting skills over 3 years. Basic monitoring, evaluation and impact reporting skills relates to the level one indicators of 'Monitoring and Evaluation' in PQASSO.

30 organisations supported through one-to-one advice by the Development & Funding Advice Manager on advanced monitoring, evaluation and impact reporting skills over 3 years. Advanced monitoring, evaluation and impact reporting skills relates to the level two indicators of 'Monitoring and Evaluation' in PQASSO.

24 training courses covering topics on financial management skills; and monitoring, evaluation and impact reporting skills over 3 years to cover topics of collective benefit identified through regular feedback. This is one per quarter on financial management skills, and one per quarter on monitoring, evaluation and impact reporting skills.

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.

70 organisations have improved basic financial procedures in place to help them meet legal requirements in relation to financial management.

30 organisations have improved strategic planning skills in managing income and expenditure together with exploring more varied income sources and trialling more efficiencies.

70 organisations have improved systems for tracking activities and outcomes to enable them to review services, inform decision making and report to funders.

30 organisations have improved information about their activities and impact to enable them to improve operationally and strategically, manage change, and demonstrate accountability.

Who will benefit?

About your beneficiaries

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

150

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

Enfield (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?

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

1-10%

REPLACED

Funding required for the project

see Appendix A

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Community Accountant	41,951	42,371	42,794	127,116
Development and Funding Advice Worker	33,272	33,605	33,941	100,818
Training Courses	1,400	1,400	1,400	4,200
Administration expenses	900	900	900	2,700
Line Management	2,700	2,700	2,700	8,100
Staff Training	250	250	250	750
Travel Expenses	300	300	300	900
	0	0	0	0
	0	0	0	0

TOTAL:	80,773	81,526	822,285	244,584
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
London Borough of Enfield	22,500	22,500	22,500	67,500
	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

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
Community Accountant	19,451	19,871	20,294	59,616
Development Worker	33,272	33,605	33,941	100,818
Training Courses £100 x 8 per year	1,400	1,400	1,400	4,200
Administration	900	900	900	2,700
Line Management	2,700	2,700	2,700	8,100
Staff Training	250	250	250	750
Travel Expenses	300	300	300	900
	0	0	0	0

TOTAL:	58,273	59,026	59,785	177,084
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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	386,715
Investment income	1,037
Income from charitable activities	8,887
Other sources	0
Total Income:	396,639

Expenditure:	£
Charitable activities	284,586
Governance costs	26,769
Cost of generating funds	44,034
Other	40,496
Total Expenditure:	395,886
Net (deficit)/surplus:	753
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	6,008
Investments	0
Net current assets	498,603
Long-term liabilities	0
*Total Assets (A):	504,611

Reserves at year end	£
Endowment funds	0
Restricted funds	186,116
Unrestricted funds	318,495
*Total Reserves (B):	504,611

*** 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? 41-50%
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Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:
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none

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	468,009	324,627	246,966
London Councils	17,879	17,879	4,470
Health Authorities	0	0	0
Central Government departments	177,248	298,961	0
Other statutory bodies	12,437	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 £
Lottery BASIS	73,060	85,103	96,915
Paul Hamlyn Foundation	0	19,000	19,000
	0	0	0
	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: **Joanne Ikhelef**

Role within **Development & Funding Advice Manager**
Organisation:

Appendix a: EVA's City Bridge Trust Revised Budget 29th May 2014

Total Project Cost

Item	Year 1	Year 2	Year 3	Total
ECAS	41951	42371	42794	127116
DFAS	33272	33605	33941	100818
Training	1400	1400	1400	4200
Admin	900	900	900	2700
LM	2700	2700	2700	8100
S Training	250	250	250	750
Travel	300	300	300	900
Total	80773	81526	82285	244584

244584

LBE	22500	22500	22500	67500
EAST	32150	0	0	32150
EVA Reserves	0	10837	11173	22010

City Bridge	26123	48189	48612	122924
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Funding Request from City Bridge

Item	Year 1	Year 2	Year 3	Total
ECAS	19451	19871	20294	59616
DFAS	1122	22768	22768	46658
Training	1400	1400	1400	4200
Admin	900	900	900	2700
LM	2700	2700	2700	8100
S Training	250	250	250	750
Travel	300	300	300	900
Total	26123	48189	48612	122924

122924