

MEETING: 16/07/2014

Ref: 12285

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Voluntary Action Lewisham

Adv: Ciaran Rafferty

Amount requested: £150,000

Base: Lewisham

Benefit: Lewisham

The Charity:

Voluntary Action Lewisham (VAL) is the local membership and development body for voluntary and community sector organisations. It was established in 1967 and aims to maximise the effectiveness of its member organisations, both individually and collectively. Currently it provides a range of training courses and support (eg on financial management; good practice; legal structures; fundraising) as well as acting as a voice for the sector within wider forums and with the local authority.

The Application:

This application is for the full costs of a project which aims to improve the evaluation and marketing skills within smaller-sized organisations (defined as those with turnover of less than £100,000). A programme of activities over three years will enable local charities to adopt appropriate tools for measuring the impact of their services; assist them in using new technology for evaluation and marketing; assist different sectors (eg health, older people, mental health) to work together and to share good practice. The grant requested would fund a p/t post to co-ordinate the project, plus day-to-day operational costs, including specialist tutor fees.

The Recommendation:

Your officers can testify, both from the management of grant caseloads and from involvement in funder networks, that many, smaller, organisations find it difficult to determine and implement effective monitoring and evaluation systems and to benefit from peer support networks. This project will address these issues and be of great benefit, therefore, to that cohort of charities in Lewisham. The project is both targeted in its approach and comprehensive in its content. A grant as outlined below is recommended:

£150,000 over three years (3 x £50,000) for the salary of a p/t (28hpw) Development Officer and the operational/delivery costs of a project to improve the evaluation and marketing skills in small organisations in Lewisham.

Funding History

Meeting Date	Decision
13/02/2013	Application withdrawn following advice to organisation that proposal did not fully meet your criteria.
14/02/2008	Application seeks three year funding for a capacity building programme. You funded the organisation for very similar work in 2004 - 2007. Although the request purports to be for a different purpose this time, the job description of the post is very similar, making this application ineligible for consideration
22/04/2004	£126,000 over three years (£40,000; £42,000; £44,000) towards the salary and support costs of providing a development service for small groups in Lewisham.

Background and detail of proposal

Smaller organisations often lack the physical and financial capacity to be involved in networks or to take advantage of training courses. As a result they are more likely to miss out on valuable information on funding opportunities; it is harder for them to engage with funders and policy makers to present the needs of their service users; and it reduces their ability to promote their services to potential beneficiaries.

This project, to be delivered by the recognised (and much valued) membership body for the sector in Lewisham, will target organisations with a turnover of less than £100,000 and provide: training courses on monitoring and evaluation; supported networking events; bespoke and intensive support to individual charities; opportunities for key issues to reach funders, service-providers and policy-makers. Part of the project is defined as improving marketing skills as it is more important than ever within this sector that organisations not only do a good job, but are able to demonstrate this.

The element of the project which will provide peer support is also very important as it is becoming more apparent that for many organisations (and smaller ones in particular) the receptiveness to learning and improving is greater when it is provided by someone who has been through the same experiences and/or has a working knowledge of the service area..

Financial Information

Of the income forecast for the current year, 94% had been confirmed as at 20th June 2014. Free reserves held are above the target level but, given the greater funding pressures on infrastructure bodies such as VAL, it is not unwise for them to hold a little more in reserve than their policy states.

Year-end at 31 st March	2012/13 Audited/Examined	2013/14 DRAFT	2014/15 Current Year Forecast
	£	£	£
Income and Expenditure			
Income	530,503	670,651	561,583
Expenditure	569,139	700,578	590,340
Unrestricted Funds Surplus / (Deficit)	(49,380)	(53,395)	3,147
Restricted Funds Surplus / (Deficit)	10,744	23,469	(31,904)
Total Surplus / (Deficit)	(38,636)	(29,927)	(28,757)
Surplus / (Deficit) as a % of turnover	(7.3%)	(4.5%)	(5.1%)
Generating funds as % of income	0.7%	0.04%	-
Free unrestricted reserves			
Unrestricted free reserves held at Year End	290,040	239,559	242,706
~ how many months' worth of expenditure	6	4.1	4.9
Reserves Policy target (£)	132,625	167,662	140,396
~ how many months' worth of expenditure	3*	3*	3*
Free reserves over target / (under target)	157,415	71,897	102,310

* the organisation states its reserves policy as a percentage of *income*