

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? 05/01/1991	

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 and impact reporting of VCOs to demonstrate their value to facilitate development for opportunities of social prescribing and social enterprise.
When will the funding be required? 02/10/2017
How much funding are you requesting? Year 1: £58,544 Year 2: £59,566 Year 3: £0 Total: £118,110

Aims of your organisation:

A) 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

B) 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 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 700+ 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.

Strategic representation of the needs of residents through the community groups that serve them.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
4	4	6	3

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	3.5 years

Summary of grant request

The Need

Financial Management

â€¢Increased financial regulation, e.g. auto-enrolment of pensions, corporate tax for non-profit companies, fundraising levy; and SORP 2015 conversance

â€¢Where financial regulations are not met, voluntary and community organisations (VCOs) pay fines and are drawn into lengthy communication with regulators resulting in frustration and closure

â€¢VCOs told EVA in a recent survey that they need help with financial management, Quickbooks training, budgeting and bookkeeping.

Impact Reporting

â€¢Very different expectations of what constitutes a project plan between funders and applicants

â€¢Consultation and Impact not clearly communicated by VCOs because they seem obvious, difficult to measure and not easily presentable

â€¢The method of data visualisation as a presentation tool is underused

Social Enterprise

â€¢Competition for charitable trust funding is increasing

â€¢Grants from local authorities are being cut

â€¢33 out of 35 EVA survey responses reported an increase in demand for their services, whereas 30 out of 35 VCOs said that they had found it harder to get funding

â€¢VCOs find business jargon a barrier and lack confidence with enterprise skills

Social Prescribing

â€¢All Enfield Health and Social Care core grants were cut in 2016

â€¢Commissioners expect providers to work in partnership, despite little experience of this in Enfield

â€¢Higher standards of evidence required by health commissioners

Project Delivery

The Community Accountant (32hrs/week) and the Development & Funding Advice Manager (31hrs/week) will provide one-to-one advice to 60 VCOs each over 2 years covering financial management; and monitoring, evaluation and impact reporting.

24 workshops covering;

1. Consultation and Market Research
2. Track Record Report and Measuring Impact
3. Marketing through Communicating Impact
4. Social Return on Investment and Data Visualisation
5. Diversifying Funding Sources
6. Partnership Agreements
7. Delivering Health and Wellbeing Outcomes
8. Sustainability Plans and Finding Efficiencies
9. Budgeting
10. Pricing Services and Full Cost Recovery
11. Forecasting
12. Presenting Accounts

What will be Achieved?

Finance

â€¢Efficiencies in budgets will be found

â€¢Projects will be more sustainable

â€¢Transparency will improve partnership working

â€¢Increased understanding and implementation of financial systems (Quickbooks and Sage)

Impact

- â€¢ Projects and services will be funded
- â€¢ Better monitoring and evaluation systems
- â€¢ Clearer impact reporting

Enterprise

- â€¢ Greater diversification of income
- â€¢ More social enterprises
- â€¢ Business plans drafted
- â€¢ Health Foundation for a social prescribing project established
- â€¢ Health outcomes communicated
- â€¢ Track record established

Why EVA is the Right Organisation

For 26 years EVA has provided expert and professional guidance, training and development support to local VCOs. Our development services enable groups to improve the lives of people living in poverty or who are less equal in society. This is only possible if community representatives are not deterred by complex financial regulations. They can only gain continued support and resources to run activities if they can demonstrate impact. These skill sets are rarely in place when a group of people set out to make a difference in their community. This support requires advanced level technical assistance. We identify goals, empower representatives, answer questions and facilitate action points. During our first two years of our three year City Bridge Trust project, our development workers have held 913 support sessions.

Meeting the Trust's Programme Outcomes

60 organisations **will** have improved skills in financial management.

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

Meeting 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.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

POASSO level 1 self assessed

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.

The Community Accountancy Service will provide one-to-one sessions, phone calls and email support for 60 VCOs on financial management.

The Development and Funding Advice Service will provide one-to-one sessions, phone calls and email support for 60 VCOs on monitoring and evaluation; and demonstrating and communicating impact.

The Community Accountancy Service and the Development and Funding Advice Service will provide one-to-one sessions, phone calls and email support for 30 VCOs on social enterprise skills.

The Community Accountancy Service and the Development and Funding Advice Service will provide one-to-one sessions, phone calls and email support for 30 VCOs using a range of technical and practical skills and confidence building techniques to meet indicators to prepare VCOs for a social prescribing project.

24 workshops run monthly by EVA development staff and 3 partnership health events following a structured business plan template.

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.

60 organisations have improved financial management systems

60 Organisations are better able to demonstrate Impact

30 organisations have improved enterprise skills and are able to make greater efficiencies

30 organisations are better equipped as providers to demonstrate health and wellbeing outcomes

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

This project will form the foundation of a social prescribing project, made possible with increased capacity of local VCOs through improved financial management and communicating health outcomes. The enterprise outcome will provide the necessary self-sufficiency for social prescribing. The events will initiate partnerships, creating the conditions for a larger scale health project, attractive to health funders or Clinical Commissioning Groups.

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?

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?

11-20%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Community Accountant Salary-32hrs	46,158	46,619	0	92,777
Development & Funding Advice Manager Salary-31hrs	37,673	38,050	0	75,722
Training Costs	1,400	1,400	0	2,800
Health Events	500	1,000	0	1,500
Administration	900	900	0	1,800
Line Management	2,700	2,700	0	5,400
Staff Training	500	500	0	1,000
Staff Travel	300	300	0	600
	0	0	0	0

TOTAL:	90,130	91,469	0	181,599
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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	0	45,000
EVA Reserves	9,087	9,403	0	18,489
	0	0	0	0

TOTAL:	31,587	31,903	0	63,489
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	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 Salary-20hrs	28,336	28,619	0	56,955
Development & Funding Advice Manager Salary-21hrs	23,908	24,147	0	48,055
Training Costs	1,400	1,400	0	2,800
Health Events	500	1,000	0	1,500
Administration	900	900	0	1,800
Line Management	2,700	2,700	0	5,400
Staff Training	500	500	0	1,000
Staff Travel	300	300	0	600
	0	0	0	0

TOTAL:	58,544	59,566	0	118,110
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Finance details

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

Financial year ended:	Month: March	Year: 2016
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Income received from:	£
Voluntary income	0
Activities for generating funds	373,509
Investment income	1,051
Income from charitable activities	4,438
Other sources	0
Total Income:	378,998

Expenditure:	£
Charitable activities	330,970
Governance costs	0
Cost of generating funds	43,039
Other	0
Total Expenditure:	374,009
Net (deficit)/surplus:	4,989
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	543,071

Asset position at year end	£
Fixed assets	2,534
Investments	0
Net current assets	540,537
Long-term liabilities	0
*Total Assets (A):	543,071

Reserves at year end	£
Restricted funds	192,004
Endowment Funds	0
Unrestricted funds	351,067
*Total Reserves (B):	543,071

* 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?
71-80%

Organisational changes

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

N/A

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	289,305	239,820	251,412
London Councils	0	0	0
Health Authorities	0	0	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	Year 3 £	Year 2 £	Most recent £
Big Lottery Basis	91,530	22,884	0
Big Lottery EAST	0	33,225	16,075
Tudor Trust	20,000	0	6,000
Big Lottery Ageing Better	0	8,771	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: **Paula Jeffery**

Role within **Chief Executive**
Organisation:

Revised Budget Appendix 1

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Community Accountant Salary	49,608	49,608	0	99,216
Development & Funding Advice Manager Salary	35,202	35,202	0	70,404
Training Costs	350	350	0	700
Health Events	500	1,000	0	1,500
Administration	900	900	0	1,800
Line Management	4,500	4,500	0	9,000
Staff Training	500	500	0	1,000
Staff Travel	300	300	0	600
	0	0	0	0

TOTAL:	91,860	92,360	0	184,220
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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	0	45,000
EVA Restricted Reserves	19,361	19,361	0	38,991
	0	0	0	0

TOTAL:	41,861	41,861	0	83,722
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	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 Salary-21hrs	28,938	28,938	0	57,876
Development & Funding Advice Manager Salary-15hrs	14,011	14,011	0	28,022
Training Costs	350	350	0	700
Health Events	500	1,000	0	1,500
Administration	900	900	0	1,800
Line Management	4,500	4,500	0	9,000
Staff Training	500	500	0	1,000
Staff Travel	300	300	0	600
	0	0	0	0

TOTAL:	49,999	50,499	0	100,498
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