

## WOKING VOLUNTARY SECTOR ANNUAL REPORT

### Executive Summary

Woking Borough Council has provided a significant level of funding and support to the Voluntary Sector in the last year. This report seeks to inform the Executive of the outcomes of the community grants for 2023/24 and the breadth of wider support offered by Council staff and teams within the various local community partnerships. This includes new innovative approaches to increasing sustainable funding for future years through external donations and wider funding streams.

For 2023/24, a new partnership commenced with the Community Foundation for Surrey to launch the Woking Council Community Fund and £144,649 has been awarded to 21 groups in line with the Council's corporate priorities. A further £21,362 was awarded to charities and voluntary groups in Woking through wider external funds administered through the Community Foundation. This 15% increase to the budget from external funds demonstrates the benefits of this new partnership, enabling beneficiaries to access multiple funds through one expression of interest.

The Council agreed to ringfence £20,000 of the community grants budget to match fund (50%) new external donations to the existing Woking Community Fund, which is an endowment used to provide grants to Woking community groups. So far, £14,250 has been added to the endowment which is positive.

Service Level Agreements have been established to fund groups that are deemed particularly important in supporting the Woking community in partnership with Council teams. These are Citizen's Advice Woking, Woking Community Transport, York Road Project, Woking Asian Business Forum, and Woking People of Faith.

Council Officers and teams across directorates work collaboratively and in partnership with local charities and community groups. Last year, Volunteer Woking supported local charities to gain over £1.2million in funding and the team managed the successful Working Together for Woking networking event with over 60 charities and 200 attendees.

Green Infrastructure and Property Services have supported the town centre climate hub with Woking Environment Action (WEAct) and various green projects across the Borough. Leisure Services promote, support, and advise over 70 volunteer sports clubs including bespoke classes for female residents in key neighbourhoods; teaching key life skills such as swimming and cycling. Health and Wellbeing staff support and advise groups with Dementia, digital accessibility, and befriending services; connecting through local networks as part of the wider NW Health Alliance. Centres for the Community also create local hubs for charities to work together to provide accessible community support for residents.

These are an overview of just some of the partnerships and collaboration undertaken by the Council with the Woking Voluntary sector. It is noted that nationally Volunteers Week falls at the start of June and therefore this is a fitting time to report and update on this work.

## Recommendations

The Executive is requested to:

### **RESOLVE That**

the wide range of support for the voluntary sector in Woking be noted, including the benefits of the partnership with the Community Foundation for Surrey in administering community grants.

## Reasons for Decision

Reason: To report on the outcomes of the awards from the Woking Council Community Fund, and the wider discretionary support provided to the voluntary sector from the Council.

The Executive has the authority to determine the recommendation(s) set out above.
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<b>Background Papers:</b>	None.
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## 1.0 Introduction

- 1.1 The Council provides a wide range of financial and in-kind support to the Woking voluntary sector through its grants, partnerships, and wider discretionary support. This report provides an overview of the new process for administering community grants through the Woking Council Community Fund and Service Level Agreements, plus incentivising private sector donations to support the voluntary sector.
- 1.2 Local charities and community groups are also supported through a range of networks and partnerships with Officers and Council Teams. An overview of some of these is presented with insights from Volunteer Woking, Health and Wellbeing, Green Infrastructure, Leisure, Property, and Community Services teams.

## 2.0 Community Grants – Woking Council Community Fund

- 2.1 In 2022 the Council embarked on a new approach for administering community grants through a partnership with the Community Foundation for Surrey (CFS). This brought the process in line with other countywide Area Funds administered by CFS. It simplified the application procedure enabling community groups to have access to multiple funds through one expression of interest. The criteria for grants were updated to reflect the Council's corporate priorities and a new panel was created to agree grant awards, consisting of an independent Chair, Council Members, Officers, and wider Woking stakeholders. Details of the Woking Council Community Fund including the criteria and application guidance, can be found on the CFS website: [www.cfsurrey.org.uk](http://www.cfsurrey.org.uk).
- 2.2 Following the decision to change the administration process, all previous beneficiaries of community grants were written to in the Summer 2022 explaining the new process and inviting groups to attend online briefings where they could ask further questions. These sessions were held in September and December and feedback from the participants was positive.
- 2.3 The panel for the Woking Council Community Fund met for the first time on 4<sup>th</sup> April 2023 to agree the grant awards for 2023/24 with a budget of £144,694. A detailed breakdown of the due diligence process, the awards confirmed for the successful applicants, and information regarding the unsuccessful applications is provided below in a report from CFS, included in this report in Appendix 1.
- 2.4 The Panel awarded all the funds to 21 organisations. All applications recommended to the panel had undergone a thorough due diligence assessment and every award given clearly demonstrated a local and specific benefit to Woking residents, as per the Council's priorities. One recommendation from the Panel was to seek to promote any future grants to local green initiatives as there was a lack of applications linked to Council's Greener Communities strategic priority.
- 2.5 The organisations that received funding from the Woking Council Community Fund are:
  - Cherry Trees
  - East to West
  - Emmaus Transformation Trust
  - GASP Motor Project
  - Headway Surrey
  - Home-Start Runnymede and Woking
  - Intergenerational Music Making
  - Jigsaw (South East)
  - Liaise Women's Centre (Maybury Centre Trust)

- Maybury and Sheerwater Community Trust (MASCOT)
- North Surrey Community Counselling Partnership
- Parkinson's UK - Woking and Weybridge Branch
- Peer Productions
- Sight for Surrey
- Surrey Welfare Rights Unit
- TALK Surrey CIO
- Woking & District Men's Shed
- Woking Community Furniture Project
- Woking Shopmobility
- Woking Street Angels
- YourSanctuary

2.6 In addition to the Council's budget, a further £21,362 was sourced from wider CFS funds which means that 24 groups benefited overall. This 15% increase demonstrates the added value of the partnership in accessing multiple funding streams through one expression of interest. Full details are included in Appendix 1.

### **3.0 Match-funding to the Woking Community Fund**

- 3.1 In 2022 the Council explored innovative ways to increase local investment into the voluntary sector through external, private donations. It agreed to ringfence up to £20,000 from the community grants budget to use to match-fund (50%) donations to the Woking Community Fund. The Woking Community Fund a pre-existing endowment fund also administered by the Community Foundation for Surrey and is similar to other local area funds in the County. This approach seeks to create more sustainable funding for the voluntary sector in future years.
- 3.2 A joint meeting was held between CFS, Woking Works and Volunteer Woking to promote this new initiative. As a result, greater awareness has been raised and new donations totalling £14,250 (including the match-funding) have already been received:

<b>Total donations received to date</b>	<b>Total match-funded</b>	<b>Amount added to date</b>
£9,500	£4,750	£14,250

### **4.0 Service Level Agreements**

- 4.1 Service Level Agreements have been created for organisations that were deemed particularly important in supporting the Woking community in partnership with Council teams.

<b>Organisation</b>	<b>2023/24 Award</b>	<b>Service Provision</b>
Citizen's Advice Woking	£265,750	To support Woking residents with free, confidential, impartial, and independent advice on all areas of social law, including in the town centre and outreach across the Borough. The services include the County Court Help Desk and Financial Capability Programme. Grant includes premises service charge.

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Woking Community Transport	£170,485	To provide door to door transport for anybody who has a mobility or sensory impairment which means they are unable to use or experience difficulty or discomfort using alternative means.
York Road Project	£43,290	To provide a rapid response service to rough sleepers in Woking and to individuals at risk of homelessness in Woking through the Resource and Prevention Centre.
Woking Asian Business Forum	£10,000	To provide networking opportunities in Woking and advice on health and wellbeing, professional development, and business liaison. Community outreach is led by the Outreach Manager which includes managing the Alpha Road Community Hall (ARCH).
Woking People of Faith	£9,000	To draw together Woking representatives from Jewish, Christian, Muslim, Hindu, Baha'i and other recognised World religions, organising educational events and other activities which help the wider community to understand differences in faith and culture, thereby reducing prejudice and improving inter-community relations.

### 5.0 Council Teams and Officer Support

#### Volunteer Woking

- 5.1 Volunteer Woking recruits and matches individuals and groups interested in volunteering with local charities, with over 500 organisations and 2,300 active volunteers. It also provides advice and training on governance, safeguarding, identifying gaps in provision of services, local collaboration and strategy, and processing Disclosure & Barring Service checks. The team promotes its services on a dedicated website, for more information see: [www.volunteerwoking.org.uk](http://www.volunteerwoking.org.uk).
- 5.2 Volunteer Woking organises the annual event 'Working Together for Woking' which brings together over 60 charities to promote local services and volunteering opportunities. In 2022, over 200 people attended, and feedback was positive with over 25 new volunteers signing up to work with charities on the day. This is a popular networking opportunity and the event for this year is scheduled for 9<sup>th</sup> November 2023.
- 5.3 Funding support from Volunteer Woking ranges from bespoke advice and help with draft applications to Woking-specific funding newsletters, with opportunities to network and meet the funders. Over £1.2million of funding was awarded to Woking charities in the last financial year because of this support.
- 5.4 Last year Volunteer Woking organised over 906 hours of Corporate Social Responsibility volunteering with Woking businesses, benefitting many local charities and schools. Active involvement in the local community can bring a range of benefits to businesses. Following a volunteering day on The Basingstoke Canal, Jane Damon, Ecommerce Growth Executive at BOC said, "It was very satisfying to look back over the canal at the end and see the results of

our hard work. We found it very rewarding to give something back to our local community, and it proved to be a memorable experience for us all with positive feedback from everyone involved.”

### Green Infrastructure

- 5.5 The Green Infrastructure Team support local volunteering initiatives with the Woking Biodiversity Group and Surrey Wildlife Trust at sites across the Borough including St John’s Lye, Millmoor Common, White Rose Lane and Westfield Common. It also promotes ways for Woking residents to get involved through volunteering through Planet Woking, with information on the website and the Woking Community Forum for consultations. The team has also long supported Woking Environment Action (WEAct) including the new hedgehog project and, together with the Property Services Team, climate hub initiative in the town centre.

### Leisure and Community Services

- 5.6 Leisure Services support many voluntary initiatives in line with the Council’s Health and Wellbeing Priorities. Woking has over 70 volunteer sports clubs including some of the biggest junior clubs in Surrey, helping to keep residents active. The Council team support with venue provision, development, marketing, and general advice including governance and safeguarding. A recent priority has been to increase voluntary exercise classes for female residents in key neighbourhood areas, including helping to teach participants important life skills such as swimming and cycling.
- 5.7 Sheerwater Together is one example of a collaborative volunteer group working to enhance the community and social offer for residents in Sheerwater. Woking Tigers are also a successful charity in the same area, running well attended youth nights and other community activities, all by volunteers and linked in with local partnership networks.
- 5.8 The Centres for the Community continue to develop their offer for local communities by bringing charities together to co-locate as community hubs. An initiative for 2023 is launching the new café at Moorcroft in Westfield, run by the charity Dramatize which supports adults with additional needs to gain skills and training for employment. A further success is Andy’s Man Club which is run out of The Vyne, bringing men together to support one another with mental health needs. Wellbeing groups for men are notoriously challenging to promote and sustain due to the nature of the needs and target group, however, Andy’s Man Club consistently has over 20 participants which is a great achievement in Knaphill.

### Health and Wellbeing

- 5.9 The breadth of overall support is far reaching, and the aforementioned networks and team collaborations are just part of the wider landscape of how the Council works together with the voluntary sector. Notably, the Council also delivers many services funded through health partnerships which supports the voluntary sector. For example, Social Prescribing signposts residents to charities and community groups all over the Borough, many of whom do not meet thresholds for statutory services and rely on this community provision.
- 5.10 Supporting residents to access services online is a challenge and Health and Wellbeing Officers are supporting with various initiatives in partnership with the voluntary sector. The ‘Tech to Connect’ initiative brings people together to reduce digital exclusion and 25 Officers have been trained to be ‘Tech Angels’ along with numerous volunteers, helping individuals to get online and access the support they need. The Council have supported Woking ROC, a community engagement group, to PAT test donated laptops before giving them to residents who need them. The Health and Wellbeing teams have also linked local groups, such as Welcome Church, with Surrey Coalition of Disabled People to ensure that services are inclusive and accessible.

5.11 Dementia, and loneliness and isolation are key Health and Wellbeing priorities, and Council teams work collaboratively with the voluntary sector to support these. A full action plan which shows the wider detail of this work is now presented to the Woking Wellbeing Group. Examples include working with the charity Silver Friends to enhance friendship and befriending across the Borough. Officers who are Dementia Ambassadors also visit faith networks, schools, community groups and charities to share knowledge and information, bringing these together as joint stakeholders to form the Woking Local Dementia Action Alliance.

### 6.0 Corporate Strategy

6.1 The criteria for the Woking Council Community Fund reflects the Council's corporate priorities as outlined in the Woking for All Strategy. These were promoted by the Community Foundation for Surrey and the outcomes have been mapped according to these categories in Appendix 1 of this report. The criteria were promoted as follows:

#### 6.2 Healthier Communities:

- Projects which support improving health outcomes in our communities in particular addressing health inequalities in our Borough (Priorities: Mental Health, Living independently, carers, isolation and loneliness, obesity).
- Projects that encourage and increase active lifestyles and participation through the provision of varied cultural and sporting opportunities and amenities.
- Projects supporting safer communities.
- Projects to provide early support to improve residents' health and wellbeing, or support residents to be more proactive about their health.
- Support improved engagement in active lifestyles, in particular by under-represented groups/ages.

#### 6.3 Engaged Communities:

- Projects which support the ability of communities to develop solutions to local needs and support those most disadvantaged in our communities.
- Projects supporting older, vulnerable, and disabled people in our community.
- Projects supporting engagement in areas of the Borough highlighted by the Indices of Multiple Deprivation, particularly with children, younger people, and older people.

#### 6.4 Greener Communities:

- Projects which support access to green space for members of the community who wouldn't normally be able to access.
- Projects which support the Borough in tackling climate change, noting the Council's target of the Borough becoming carbon neutral by 2050.

#### 6.5 Prospering Communities:

- Projects which support our communities to improve skills and raise aspirations.

- Projects which improve signposting of career opportunities to those seeking employment and training.

### **7.0 Implications**

#### Finance and Risk

- 7.1 This report highlights the financial and wider support given to the voluntary sector in Woking. Any future financial support is subject to annual budgetary approval and needs to be reviewed within this context.

#### Equalities and Human Resources

- 7.2 This report highlights many ways that the Council seeks to enhance inclusivity for residents through supporting and working in partnership with the voluntary sector.

#### Legal

- 7.3 All agreements, including Service Level Agreements to beneficiaries and contracts with the Community Foundation for Surrey, have been agreed through the Council's legal mechanisms.

### **8.0 Engagement and Consultation**

- 8.1 The new processes for administering community grants were designed to enhance engagement with the voluntary sector, providing both financial and wider advice and support as highlighted in this report. It should be noted that in 2022, all prior beneficiaries of community grants were written to, and two online briefing, and question and answer sessions were conducted.

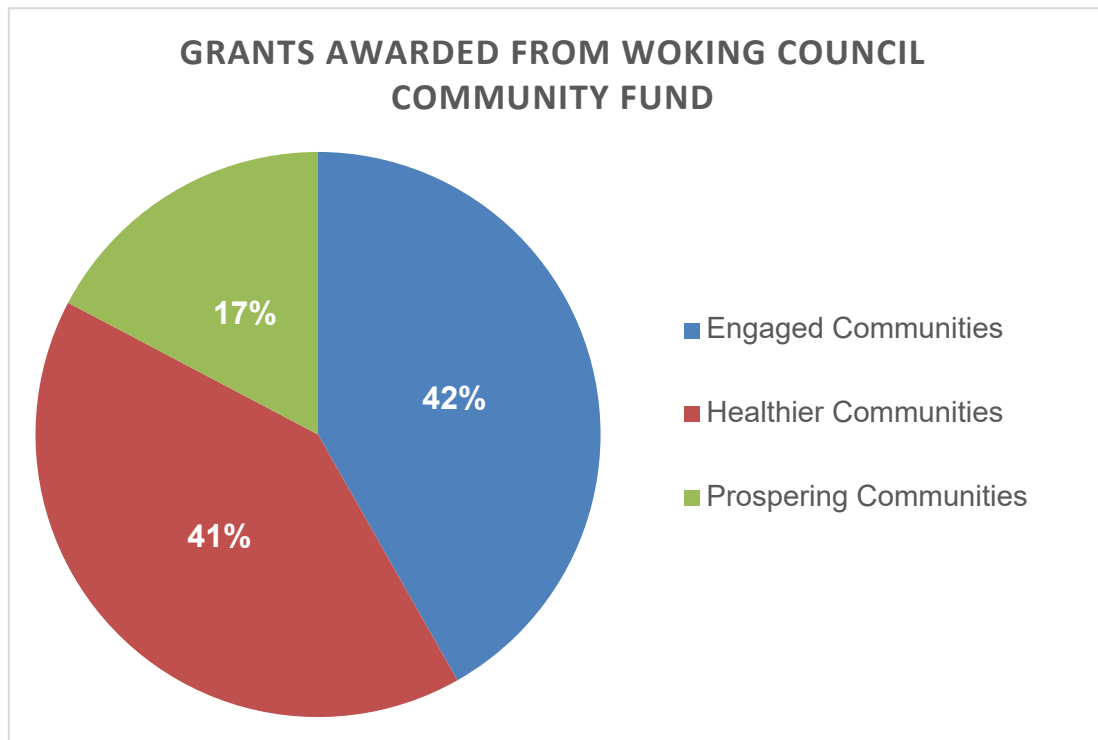
REPORT ENDS



## Woking Council Community Fund Report from the Community Foundation for Surrey

### Executive Summary

- £166,056 was awarded to 24 groups of which **£144,694** was awarded from Woking Council Community Fund.
- 38 applications were received totalling £258,347
- 26 applications were presented for consideration by the grants panel, 12 applications were not recommended for consideration as they did not pass due diligence or were not deemed a good fit for the fund criteria.



The purpose of the partnership between Woking Borough Council and Community Foundation for Surrey was to deliver voluntary grants in Woking in the most effective way possible, to:

- Leverage funding from other community foundation donors and provide a single front door for applicants.
- Maximise the impact of the grants by applying Community Foundation due diligence to ensure the funded organisations are well run and governed.
- Ensure projects supporting those in the highest need in Woking are prioritised for funding.
- Ensure projects funded address the strategic priorities of Woking Borough Council

### Recommendations for 2024/25

- Notify potential applicants of timescales for 2024/25 in good time to enable community groups in Woking to plan.
- Announce the decision on the budget available in time to promote the fund to suitable applicants.
- No applications were received which fit the theme of Greener Communities. The panel may wish to ring fence funds for this priority and the Foundation can proactively seek appropriate projects.

### Process

In July 2022 Woking Borough Council (WBC) announced the partnership with the Community Foundation for Surrey (CFS) to deliver voluntary grants in Woking. The programme was widely advertised to communicate the change to the previous system. WBC staff contacted all previous grant holders to ensure they were aware of the new process.

CFS and WBC held joint Q&A sessions to answer questions and concerns from potential applicants. First stage Expression of Interest were invited for a deadline of 9<sup>th</sup> of January 2023. Those applicants with a suitable project were invited to make a full application with the deadline 23<sup>rd</sup> of January 2023.

Applications received underwent Due Diligence and Application Review (See Annex 1). The purpose of the due diligence performed on eligible applicants is to manage the potential risks associated with granting funds as they relate to;

- Grantee fraud
- Ineffective or poor-quality grants
- Consequent damage to reputation

The decision-making panel for the fund was made up of the CFS Woking Community Fund panel, two CFS Trustees, two elected members from WBC selected for their portfolio, Cllr Will Forster and Cllr Colin Kemp, and two WBC employees from the Communities team.

Qualifying applications were shared with the panel for comment ahead of the awards meeting on 4<sup>th</sup> April 2023.

### Outcomes

The panel awarded all of the available funds to 21 Woking organisations.

- Cherry Trees
- East to West
- Emmaus Transformation Trust
- GASP Motor Project
- Headway Surrey
- Home-Start Runnymede and Woking
- Intergenerational Music Making
- Jigsaw (South East)
- Liaise Women's Centre (Maybury Centre Trust)
- Maybury and Sheerwater Community Trust (MASCOT)
- North Surrey Community Counselling Partnership
- Parkinson's UK - Woking and Weybridge Branch
- Peer Productions
- Sight for Surrey

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- Surrey Welfare Rights Unit
- TALK Surrey CIO
- Woking & District Men's Shed
- Woking Community Furniture Project
- Woking Shopmobility
- Woking Street Angels
- YourSanctuary

CFS were also able to find CFS donors to support 3 groups which had not been funded due to availability of funds:

- Canalside Community Fridge
- Dance Woking
- Woking and Sam Beare Hospices

Additional funds were also awarded to Emmaus Transformation Trust which had received a partial award from the Woking Council Community Fund.

Only two organisations which were considered by the Woking panel received no funding (see below table). These were considered by the panel to be a lower priority. These applications were not appropriate for other Community Foundation Donor Funds.

Successful applicants were notified informally of the outcome of the panel pending receipt of funds from WBC to make formal grant offers and payment. Grant holders will be asked to provide monitoring reports by end of February 2024.

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Grant Application Name	Amount applied for	Awarded from Woking Council Community Fund	Awarded from other CFS Funds	Project Description - Summary
Canalside Community Fridge - Core costs	£ 1,500.00		£ 1,500.00	Core costs to support a community fridge
Cherry Trees - Woking provision	£ 6,000.00	£ 6,000.00		Funding towards the cost of respite care for disabled children from Woking.
Coram Life Education - PSCH workshops	£ 9,999.95	£ -		Funding for PSHE workshops in primary schools in Woking
Dance Woking - Social Travelling Tea Dance	£ 4,862.00	£ -	£ 4,862.00	Funding for a social tea dance for isolated over 65's.
East to West - Short Stay School support worker	£ 7,472.00	£ 7,472.00		Funding for relational support workers in a North West Surrey Short Stay school to support the pastoral care of vulnerable students.
Emmaus Transformation Trust - core costs	£ 15,000.00	£ 10,000.00	£ 5,000.00	Funding towards the core costs of a community hub supporting a wide section of the local community with many successful projects.
GASP Motor Project - Woking	£ 10,000.00	£ 10,000.00		Funding for vocational training for young people in danger of becoming NEET
GIVE - Volunteer Coordinator	£ 6,000.00	£ -		Funding for a volunteer coordinator for a new mental health befriending charity.
Headway Surrey - survivors support courses and counselling	£ 7,000.00	£ 7,000.00		Funding for a specialist charity to deliver courses and counselling to individuals in Woking with acquired brain injury.
Home-Start Runnymede and Woking - core costs	£ 10,000.00	£ 10,000.00		Funding towards the core costs of a charity supporting young families.
Intergenerational Music Making, CIC - Woking Hub	£ 2,500.00	£ 2,500.00		Funding for intergenerational music workshops in Woking.
Jigsaw (South-East) - Woking	£ 3,300.00	£ 3,300.00		Funding for grief support for children in Woking
Liaise Women's Centre (Maybury Centre Trust) - Coordinator Salary	£ 10,000.00	£ 10,000.00		Funding for the salary costs of a Project Coordinator supporting women from minority ethnic backgrounds to increase wellbeing, and tackle loneliness and isolation.

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Maybury and Sheerwater Community Trust (MASCOT) - Core Costs	£ 10,000.00	£ 10,000.00		Core costs to support a community hub
North Surrey Community Counselling Partnership - bursaries	£ 10,000.00	£ 10,000.00		Funding for bursaries to allow individuals in need to access subsidised long-term counselling.
Parkinson's UK - Woking and Weybridge Branch - Hydrotherapy	£ 1,600.00	£ 1,600.00		Funding for weekly hydrotherapy for people with Parkinsons
Peer Productions Project Purple	£ 7,949.89	£ 8,000.00		Funding for a referral only 10 week creative workshop for teenagers who are vulnerable in some way e.g. mental health, learning difficulty in Woking.
Sight for Surrey - Benefits Service	£ 1,500.00	£ 1,500.00		Funding for a benefit advice service for individuals in Surrey affected by slight loss.
Surrey Welfare Rights Unit - Core costs	£ 10,000.00	£ 10,000.00		Funding towards the core costs of a debt and benefits advice charity.
TALK Surrey CIO- Core costs	£ 2,500.00	£ 2,500.00		Funding for core costs of an aphasia support group.
Woking & District Men's Shed - outdoor extension and equipment	£ 3,000.00	£ 2,862.00		Funding to support an extension of a Men's Shed and new equipment for day to day running.
Woking and Sam Beare Hospices - Community Specialist Nurse	£ 10,000.00		£ 10,000.00	Funding for a clinical nurse specialist to support palliative care in a deprived community.
Woking Community Furniture Project - core costs	£ 4,710.00	£ 4,710.00		Funding for the organisation's core costs of fuelling and running a van to collect donated items and deliver goods to those in need.
Woking Shopmobility - Core costs	£ 11,250.00	£ 11,250.00		Funding towards the running costs of a charity supporting people with mobility issues in and around Woking.
Woking Street Angels - Core Costs	£ 11,204.00	£ 9,000.00		Funding towards a late-night weekend patrol by volunteers helping people who may be vulnerable due to becoming intoxicated or separated from friends.
yourSanctuary - Telephone helpline for Woking	£ 7,000.00	£ 7,000.00		Funding for a helpline for people experiencing domestic abuse.

	Total applied for	Total awarded from Woking Council Community Fund	Total awarded from wider CFS funds	
	£184,347.84	£144,694.00	£21,362.00	

**Applications received but not recommended to the Panel with reasons**

<b>Grant Application Name</b>	<b>Amount applied for</b>	<b>Reason for Rejection (notes)</b>
Catalyst Outline	£10,000.00	Positive project but Surrey-wide without specific focus on Woking.
Food Matters Foundation	£7,000.00	National charity - not a priority local group. No track record in Woking.
Halow Project	£4,750.00	Not an established service for Woking - no track record or evidence of need.
Lakeview Community Action Group	£5,000.00	Good project but high reserves and the 2022 WBC grant has not yet been spent. Recommend support on financial management from Volunteer Woking/CFS.
Let's Read Ltd	£9,000.00	High reserves, close to statutory provision questions about efficacy of project.
Maybury Centre Trust	£8,600.00	Application lacks information no evidence of need or what the funding would be used for.
Mediation Surrey CIO	£4,500.00	The organisation has high reserves and is therefore not a priority for funding at this time.
Other Ways To Care	£5,000.00	Unclear what they want to do. Income requires them to register with CC - refer to Volunteer Woking or CFS.
Relate West Surrey	£5,000.00	Initial appointment cost of c. £70 is potentially still prohibitive for many clients.
Surrey Wildlife Trust	£9,150.00	Positive project but difficult to demonstrate impact.
Woking Disability Football for All	£5,000.00	The group were previously awarded a grant to fund the kit requested in this application, the grant offer specifically excluded cost of a trip. However group spent the funds on a trip and social activities and have not demonstrated understanding of how to manage a future grant.

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Woking Gymnastics Club - Disability Awareness Course	£1,000.00	Having reviewed the safeguarding documentation and further discussions with the group it is assessed that more needs to be achieved to meet the required policies and governance.
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## Annex

### **Application Due Diligence and Review**

#### **Due Diligence**

The purpose of the due diligence performed on eligible applicants is to manage the potential risks associated with granting funds as they relate to;

- Grantee fraud
- Ineffective or poor-quality grants
- Consequent damage to reputation

On behalf of donors we seek to identify applicants which have genuine charitable purposes, and which can manage a grant award successfully to achieve positive change in the community.

#### **Eligibility check**

- Is there a management committee of at least 3 unrelated people?
- Are the governing documents appropriate? Do they contain a dissolution clause or asset lock?
- Does the group have an appropriate financial policy and apply proper processes?
- Is the Bank account in the name of the group, is the bank statement provided recent and are the bank details legitimate?

#### **Organisation Structure and Governance:**

##### **All applicants**

- What sort of organisation it is (e.g. community group, registered charity, CIC, not for profit company etc.)
- Check Charity Commission website/Companies House – is the reporting up to date
- Does the application conform to the purposes of the organisation?
- Is the level of resource - the number of trustees/committee members, staff and volunteers in proportionate with the scope of the project.?
- How do the trustees provide governance? How often do they meet, how involved are they in supporting the running of the organisation?
- Appropriate safeguarding policy and processes are in place.

##### **Repeat Applicant**

- Has anything significant has changed since the last application – e.g. new CEO or Chair of Trustees, change to governing docs or policies.

##### **Finance:**

- Are the R&A in a standard format?
- Have the accounts been externally examined and signed as approved?
- What is the surplus or deficit?

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- Is there a significant change between this FY and last? Is there a trend?
- What are the reserves at the year end and what portion of the reserves is unrestricted
- What is the ratio of restricted and unrestricted activity/income?
- How many months' operational expenditure do current reserves equate to?  
Approximately equal to. 6-12 months is usually considered ideal – depending upon the size of the organisation, whether staff are employed the proportion of activity which is not restricted, are they saving for a specific project etc.
- Sources of income – is there a healthy spread or a worrying dependence on one source of funds.
- How does the overall financial situation relate to the application? Could they fund the project from their own resources?

If accounts are older than 18 months review an updated financial position

### Policies

#### Financial Policy

Guidance

<https://www.gov.uk/government/publications/internal-financial-controls-for-charities-cc8/internal-financial-controls-for-charities>

Example Financial policies are available to share with applicants.

#### Safeguarding:

Guidance <https://www.gov.uk/guidance/safeguarding-duties-for-charity-trustees>

#### Must have –

- Definitions of abuse
- Reporting procedure
- An adult/child protection officer
- Training for everyone in the organisation who would be working with vulnerable people
- DBS checks to adequate levels and details about reporting issues to the relevant authorities
- Annual renewal (or a good reason why it isn't annual)

#### Equality Policy:

Must have –

- Reference to Equality Act 2010
- Details about equal access to services and employment
- A section on the prevention of harassment
- A section on how complaints are dealt with (must be fairly)
- Reference to age, pregnancy, sexuality, disability, race, religion/belief, gender, transsexual people

### Evaluation

#### The Project/request

- The extent to which the proposal is responding to clearly demonstrated need or demand

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- Whether the number of beneficiaries is realistic and if they have demonstrated sound (and appropriate) plans to reach and engage their target audience.
- Effective Practice - assessment of the group's ability to manage the work - AND - **whether** the proposed activities will be successful in producing the outcomes they have specified and that the two are clearly linked.
- What will happen once the funding period comes to an end and how will the work be sustained in the future?

### Previous grants:

- What has been the quality of reporting and more importantly what outcomes has the applicant been able to present.

### Fit with Fund:

- Does the group or project fit well with the aims and criteria of any of our donor funds?