

APPENDIX F

WAVERLEY BOROUGH COUNCIL

EXECUTIVE - 29 SEPTEMBER 2009

Title:

WAVERLEY COMMUNITY PARTNERSHIP 2010/11 FUNDING ROUND

[Portfolio Holder: Cllr Stefan Reynolds]

[Wards Affected: All]

Summary and purpose:

The purpose of this report is to seek the Executive's approval to continue to support the Waverley Community Partnership scheme and the Waverley Voluntary Grants Partnership (WVGP) in 2010/11.

How this report relates to the Council's Corporate Priorities:

The Waverley Community Partnership awards funding towards the running costs of organisations that provide high priority services for the benefit of Waverley residents, in partnership with the Council. The services that the partner organisations deliver cut across all corporate objectives and could fall in any of the 5 priority areas. In addition the Council made a specific commitment in the Corporate Plan to work with the voluntary sector organisations that Waverley supports to ensure that from April 2008, there is a year-on-year increase in the number of people assisted by these services. Waverley's contribution to the Waverley Voluntary Grants Partnership (WVGP) also helps support organisations specifically in the social and welfare area.

Equality and Diversity Implications:

The organisations that Waverley supports under the Waverley Community Partnership provide access to key services in the borough which benefit a wide range of users including the most vulnerable and disadvantaged.

Resource and legal implications:

In the previous three years, the total Waverley Community Partnership (previously Sponsored Organisation Scheme) funding awarded was as follows:

	Number of Organisations supported	Total Funding Awarded (£)	
2007/08	25	602,194	SOS
	27	52,412	WVGP
Total	<u>40</u>		

		<u>654,606</u>	
2008/09		28	628,926
		36	52,400
	Total	<u>43</u>	<u>681,326</u>
2009/10		26	636,087
		40	52,410
	Total	<u>66</u>	<u>688,497</u>

SOS
WVGP

WCP
WVGP

The organisations receiving grants from the Waverley Community Partnership in 2010/11 are detailed in Annexe 1.

This combined funding represents nearly 5% of Waverley's total net General Fund revenue budget in 2010/11. The Council is facing major pressures on its budget in 2010/11 and in future years, with a real terms reduction in Government grant, declining income levels and new service pressures. This report makes proposals to test the value of grants and to notify organisations of the financial position.

The proposed application timetable for the scheme will enable the Waverley Community Partnership applications to be considered as part of the budget process.

Background

1. The principal aim of the Waverley Community Partnership is to provide financial support 'for the ongoing revenue costs of voluntary and charitable organisations that are delivering high priority services for the benefit Waverley residents in partnership with the Council'.
2. The scheme is reviewed annually by a group of officers in conjunction with the Portfolio Holder for Partnerships to ensure that the grant criteria and assessment processes continue to meet the priorities of the Council. Copies of the draft criteria and application documentation are available if Members would like a copy.

Existing Funding Levels and New Organisations

3. When awarding the grants for 2009/10 year the Council notified organisations of the likely future financial pressures on the Waverley Community Partnership and indicated that they should identify other sources of income to avoid any 'emergency' action at the last minute. Whilst an inflation based increase would be of particular comfort to those organisations with staff costs and it may also encourage other funders to increase their grants, at this stage of the budget process, it is proposed that existing partner organisations be given notice of a likely inflation freeze on funding in 2010/11. These organisations will be asked to explain the potential impact of this on their service delivery within their application. Organisations will also be asked to consider the impact of a phased reduction in funding in future years. This notification would take

the form of a letter from the Deputy Chief Executive sent with the application packs. Organisations received a similar notification last year and approximately half of the applicants requested the same level or less funding than the previous year's grant award.

4. At its meeting on 24 February 2009 the Council approved the proposed funding levels for 2009/10. The Executive had proposed a further £10,000 to be allocated to the pot and this was agreed by the Council. £7,161 was distributed amongst the day centres and a balance of £2,839 was reserved as an emergency funding provision but has not been spent to date. Members were particularly minded to support the community care organisations whose services were considered to be of great importance to the less advantaged residents in the community, particularly in the difficult financial climate.
5. In recent years, with limited resources and the Council's desire not to cut funding levels to existing organisations, there has been limited scope to introduce funding for new organisations. The only way to create 'headroom' to give a realistic chance of success in their application is to reduce the funding of existing organisations, either by a blanket percentage reduction or by a reassessment of the extent to which the organisation meets Waverley's grant criteria. A robust assessment process, which includes measuring the performance of organisations, may create an opportunity to fund new organisations. Therefore, it is proposed that application for revenue funding in 2010/11 should be open and not restricted to those organisations currently receiving grant.
6. The financial status, including the extent of external funding support, and business plans of applicants will be closely examined to ensure the Council is satisfied with the applicants' efficient, prudent and effective service delivery.

2010/11 Timetable

7. It is proposed that applications are invited to apply for revenue funding for the financial year 2010/11 with a closing date for applications of 17 November 2008.
8. Key 2010/11 dates:

30 th September 2009	2010/11 application round opens
17 th November – 11 th December	Application deadline & assessment of applications
11 th /12 th January 2010	O&S Committees to comment on proposed grants
2 February 2010	Executive
16 February 2010	Council
17 February	Grant award letters sent to applicants

Application Process & Criteria

9. The existing process was reviewed against the principles of the Surrey Compact, to which the Council is committed. The Compact encourages funders to make it easier for voluntary organisations to seek funding, to improve the process for funding and evaluation is appropriate and proportionate.
10. It is suggested that the eligibility criteria for organisations wishing to be considered for funding be retained.
11. In particular, Members are asked to note that :
 - Social/Welfare Organisations in Waverley will continue to be funded through the Waverley Voluntary Grants Partnership (WVGP) for 2010/11.
 - Organisations with general reserves/funds (excluding any designated funds for specific projects) should continue to be considered on a case-by-case basis. Those organisations with reserves will be required to submit a clear written reserves policy explaining the reason for the level of reserves and their proposed future uses. In considering organisations level of reserves, Waverley officers will consider the Charity Commission's current recommendations and advice.
 - Organisations will be assessed against the degree to which they contribute to Waverley's Corporate Plan, current priorities and their performance. To ensure that only organisations eligible to apply for revenue funding are considered, officers will continue to reject applications which clearly do not meet the eligibility criteria, thereby providing organisations with clarity at an early stage.

Assessment Process

12. It is appropriate for the evaluation criteria to be updated to measure the extent to which organisations will use funding to meet Corporate Plan objectives. How the partner organisations deliver their promises and provide services will also be assessed to ensure they continue to provide high standard, value for money services from the funds that the Council invests.
13. Officers are working in partnership with organisations that were funded in 2009/10 to report back on their performance and delivery of their partnership agreement. This information will be used to assess funding levels for 2010/11. The O&S Committees will receive an interim performance monitoring report in November updating them on the impact that Waverley's funding has had on partner organisations for the six months from April 2009 to September 2009. Organisations receiving a

grant of less than £1,000 will not be asked to report on their performance. Where a partner organisation has a nominated Member representative, Link Officers will also invite Members to comment on the organisation's performance since April 2009.

14. Applications will be assessed by link officers in the first instance, then subjected to a moderation process involving the Portfolio Holder for Partnerships, before grant recommendations are prepared and reported to Members in January.

Partnership Agreements

15. Once a revenue grant is approved and a grant offer made, a partnership agreement is prepared by each organisation and the relevant Waverley service officer, who forms the key link officer during the funding period. The partnership agreement details the key outputs and achievements for the year and is signed by both parties. The partnership agreement enables service officers to monitor each organisations performance against stated outcomes. In 2010/11, particular emphasis will be placed on the Council's requirement for publicity and visible evidence of Waverley's funding and on the need for the organisation to monitor and report on performance.

Waverley Voluntary Grants Partnership

16. The Waverley Voluntary Grants Partnership (WVGP) is a partnership fund with the Guildford and Waverley Primary Care Trust (PCT) and Surrey County Council Adults and Community Care and Children's Services which seeks to fund social welfare organisations. Waverley provides funding to the WVGP to aim to lever in a greater level of funding for Social/Welfare Organisations in the Borough. A separate report will be brought to the Executive later in the year following the WVGP funding decisions for 2010/11, informing Members of the grants approved to organisations.

The Future of the Waverley Community Partnership Scheme

- 17 During discussions to review the 2010/11 process officers identified that a review of the scheme could be undertaken in preparation for the 2011/12 funding round in a year's time. In particular to look at:
 - The priorities of the scheme and whether they should be updated;
 - Alternative ways of funding organisations that provide key services within the borough such as service level agreements or contracts.

It is proposed that the scheme be reviewed as part of the Community Overview & Scrutiny's special review of how the Council supports the voluntary sector which will start in October 2009.

Recommendation

The Executive is recommended to agree:

1. that for budget planning purposes, the total amount of the revenue grants pot and the contribution to the Waverley Voluntary Grants Partnership in 2010/11 be frozen at the 2009/10 level;
2. the existing partner organisation be advised:-
 - a. of the pressures facing Waverley's budget in the coming years;
 - b. that it may be difficult to maintain support at previous levels; and
 - c. that link officers will work with partner organisations in seeking additional funding support from elsewhere.
3. that the 2010/11 bidding round should be opened and that applications from new organisations be considered, and
4. that the future of the scheme be included in the Community Overview and Scrutiny's special review of how the Council supports the voluntary sector.

Background Papers (DoF)

There are no background papers (as defined by Section 100D(5) of the Local Government Act 1972) relating to this report.

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