

URN: 21-015

Subject: Review of VCSE Grants 2020/21 &
Proposed Great Yarmouth Community Investment Fund

Report to: Housing & Neighbourhoods Committee - 4 March 2021

Report by: Holly Notcutt, Community Development Manager & Paula Boyce, Strategic Director



SUBJECT MATTER/RECOMMENDATIONS

To provide Housing & Neighbourhoods Committee with feedback on the current community grants delivery commissioned to run until 30 August 2021, and to set out the proposal to transition to a Community Investment Fund model in partnership with the Norfolk Community Foundation.

Housing & Neighbourhoods Committee resolves to:

- (a) Note the achievements of the commissioned VCSE organisations in supporting local communities during the pandemic and provide advice regarding the one underspent grant allocation.
- (b) Cease the current community grant scheme on 30 August 2021.
- (c) Establish the Great Yarmouth Community Investment Fund through the formation of a strategic partnership with the Norfolk Community Foundation (NCF) from 1 April 2021.
- (d) Provide a funding contribution of £50,000 from 2021/22 for a new community grants scheme as part of the Great Yarmouth Community Investment Fund to be administered by the NCF in line with the priorities set within the Great Yarmouth Locality Strategy and detailed in the criteria of this report at para 3.5.
- (e) Delegates authority to the Strategic Director to sign a formal Funding Agreement with the Norfolk Community Foundation.
- (f) Receive future six-month updates and annual reports on the work of the Great Yarmouth Community Investment Fund as set out in the terms of the Agreement with the Norfolk Community Foundation.

1. BACKGROUND

- 1.1 Over the last 15 years the Council has provided grant funding to a range of local Voluntary, Community and Social Enterprise (VCSE) sector organisations to help them deliver their work in line with Council priorities. Typically, those beneficiary organisations have focused on supporting residents with housing, budgeting, debt management, & benefit advice as well as crisis & guidance support and employment and skills support.
- 1.2 In December 2019, the Council agreed to extend the existing community grants term for one further year (April 2020 - March 2021), to allow time to review and develop a new commissioning process, whilst maintaining stability to the organisations and the residents they support. Due to the onset of the COVID-

19 pandemic, it was not possible to instigate this commissioning review under the previously agreed timeframe. In July 2020, therefore, Members agreed to further extend the existing community grants for a further five months (April to August 2021), subject to satisfactory monitoring.

- 1.3 This extension has enabled the Council to continue to support some key VCSE organisations locally who are actively supporting residents through the provision of specific and targeted information, advice & advocacy (IAA) services and other interventions which build and maintain community resilience throughout the pandemic.

2. REVIEW OF COMMUNITY GRANTS

- 2.1 All 2019/20 grant recipients, excepting one, were able to adapt to accommodate COVID-19 operating requirements, allowing them to continue delivery of support services to residents. Adaptations included moving to online and telephone one-to-one support, video conferencing group sessions, and COVID-safe face-to-face support, using appropriate PPE and adhering to distancing guidance. The ICT support services delivered by Firstmove Furnishaid were unable to be adapted, resulting in the organisation furloughing the staff member funded by the Council's community grant. The service did re-open temporarily in September 2020 for one month but closed again due to a continued inability to deliver with necessary COVID-19 restrictions. The organisation re-furloughed the staff member from October 2020.
- 2.2 All grant recipients were contacted in January 2021 and asked to provide the monitoring update presented to Members through this report. The table below sets-out the current VCSE grant recipients, their awards to August 2021, and their delivery of said grants as at February 2021 (Note: The monitoring period ends August 2021).

Organisation	12-month Grant	2020/21 Delivery	Achievements
Citizens Advice	£19,750	To deliver generalist advice and information primarily covering welfare benefits, debt, finance, housing, energy, employment, immigration, health and social care, consumer and family matters via the Great Yarmouth office and outreach service.	Pre COVID, services were largely on a face-to-face basis. Currently delivering predominantly through digital channels (telephone, email and webchat) with limited face-to-face appointments available only to those who cannot access us digitally. Service planning to meet the full level of demand using this 'blended' approach. Target progress on track, with a reported financial benefit (additional income and writing off debts) to residents of £142,000. 264 residents supported to received generalist advice, 85 of whom are GYBC tenants, over approximately 754 interactions. 40 people supported to access community and partnership-based support/activity.
DIAL	£19,750	Provision of a part time money and debt advisor to support people who have financial issues by providing budgeting support, setting up manageable	Services adapted, with staff working from home and significant adaptations to create COVID safe offices. Clients received support either by phone, video conference, or face to face

		<p>repayment plans, and liaising with creditors.</p>	<p>where needed. Progress on targets on track, with a reported financial benefit to residents of £162,500 + £36k pending.</p> <p>334 clients supported, 137 of whom are GYBC housing tenants, over a minimum 668 interactions.</p> <p>Delivery of 6 community workshops and providing volunteering opportunities has not been possible due to COVID-19 restrictions.</p>
GYROS	£17,000	<p>Operation of a Job Club and embedding ESOL training within key employment related training i.e. food hygiene and health and safety courses. Support CV writing, applying for jobs and English language support for residents. 2-hour session each week.</p>	<p>Face to face sessions have been replaced by remote 1-2-1 support, via phone and email, with 280 people receiving specialist support. The job club has been undertaken through an online platform, with success. Targets for this have been exceeded with 310 people participating and 131 people regularly accessing direct support for applications. ESOL training take up has been less successful since COVID due to digital inclusion needs (access to IT and data/Wi-Fi), with 24 participants to date.</p>
Homestart Norfolk	£19,000	<p>Provision of intensive weekly or fortnightly support to families with young children. This includes getting children school ready, to enable families with young children to improve their health, improve their household and financial management, reduce inequality and improve children's life chances.</p>	<p>Tailored support to 17 families, totalling 67 individuals, via 211 interactions using COVID-19 safe channels, including outdoor visits, telephone, text, email, and video calls. Addressing emotional, housing, budgeting, benefits, medical, food, and educational support needs. On track or exceeding progress to meet all targets.</p>
Foodbank Plus	£5,000	<p>Provision of mentoring support for people regularly using the foodbank. Focus on people who are unemployed and experiencing crisis to gain confidence, professional skills, and team-working experience, plus access an addiction recovery course.</p>	<p>34 targeted clients (High intensity users of services) have collectively received 144 1to1 counselling sessions, focussing on drug & alcohol problems, homelessness, finance/debt, low self-esteem, anxiety worry stress, depression, mental health, loneliness and isolation. All 34 additionally attend twice monthly group supervision sessions, creating peer support. 20 clients have progressed to becoming active volunteers within the foodbank team, supporting in turn over 100 additional people, multiple times. All</p>

			targets met and achieved, apart from progressing KEYS addiction training-delayed due to COVID-19 but due to start February 2021.
Firstmove Furnishaid (FMFA)	£19,000	Provision of support to people to attend ICT support sessions to complete a basic level 1 course and access pre-employment support. Support targeted at individuals who are long term unemployed or trying to re-enter the workplace and need a basic level of ICT knowledge and/or help such as CV writing.	10 employability support interactions have been delivered with 5 clients, using one month's grant money, due to only one month of opening. <i>FMFA has proposed that they retain the remaining £17,416.00 until COVID-19 restrictions allow them to resume normal duties, fulfilling the original grant terms. See para 2.4 below.</i>
Total	£99,500		

- 2.3 Monitoring information has been received by six of the six grant funded organisations. Five of these have satisfactorily delivered their commitments which formed part of their grant application. Their achievements are summarised in the table. Firstmove Furnishaid has stated in its completed monitoring report to the Council that it was unable to deliver their grant funded commitments (ICT Training) due to COVID-19 restrictions. The organisation has informed the Council that it will only be able to resume its services once the impact of the pandemic has lessened to allow them to operate safely.
- 2.4 Members are asked to provide a view on whether Firstmove Furnishaid should keep its grant as allocated in order to deliver the outcomes originally intended as soon as possible, ideally before 30 August 2021. Or alternatively, under the terms of the grant agreement, return any unspent grant to the Council on 1 September 2021.

3. ESTABLISHMENT OF A GREAT YARMOUTH COMMUNITY INVESTMENT FUND

- 3.1 The Borough Council currently advertises, administers and monitors its own community grants; those grants being 100% funded from the Council's General Fund and the Housing Revenue Account. The last grant application process in 2019 was advertised and run by way of the Council's online procurement portal. This proved cumbersome to operate from a VCSE and community organisation point of view. In scoping alternate approaches to commissioning VCSE and community organisations, officers have been exploring the merits of entering a strategic partnership with the Norfolk Community Foundation (NCF) to align our community ambitions and to enable collaboration with other interested parties wishing to give-back to our local communities.
- 3.2 The NCF is an independent registered charity regulated by the Fundraising Regulator and affiliated to UK Community Foundations. It works with businesses and individual philanthropists to raise donations and re-distribute those funds via a local grants scheme to eligible community organisations against a criteria set by the funder(s). During the pandemic the Foundation has been forefront of fund-raising from both public, private sector and national donations which are then re-distributed on application across Norfolk's charity, VCSE and community organisations. The Foundation has a strong track record of ensuring transparency and accountability and administers a number of locally centric trust funds. Each Fund is set-up as a separate entity with contributing/founding donor(s) setting the criteria for the trust fund, groups able to respond to support services needed due to COVID-19.

- 3.3 As strategic partnership is therefore proposed with the Norfolk Community Foundation to fund-raise and administer a Great Yarmouth Community Investment Fund in line with the Great Yarmouth Locality Strategy priorities which Members are being asked to approve by way of a separate report to this Committee.
- 3.4 The proposal for a Community Investment Fund is part of the Borough Council's 'COVID-19 Pathway to Recovery'; specifically designed to provide a smoother grant funding route for local charitable and community organisations able to demonstrate they have services that meet the needs of our local communities and residents supporting people to recover and flourish in spite of the pandemic.
- 3.5 In its first year, the new Great Yarmouth Community Investment Fund will administer grants of up to £10,000 in the first instance, or a greater value subject to successful fundraising led by the NCF. Multi-agency partners and the Borough Council will be encouraged to direct funding and funders to the new Fund in order to support joint commissioning. Whilst initially grants may cover up to a one year period, the aim is to establish a sufficiently-sized funding pot to enable the award of longer term funding for VCSEs e.g. a 3-year grant funding award to provide a level of sustainability to agencies and the communities they serve.
- 3.6 All allocated community grants distributed by the Great Yarmouth Community Investment Fund will be aligned to the over-arching priorities contained in the Borough Council's Corporate Plan and specifically, the emerging Great Yarmouth Locality Strategy namely services to support:
1. **Health and Well-being** - to reduce health inequality by encouraging healthier lifestyles, providing support for mental and physical health and strengthening community support.
 2. **Low Educational Attainment, Skills and Aspirations** - to improve youth education and skills pathways, attainment and create career ambition.
 3. **Vulnerability and Exploitation** - to reduce exploitation and support those at risk of exploitation.
 4. **Loneliness, Isolation and Social Exclusion** – to reduce isolation and social exclusion by building community networks and cohesion.
- 3.7 Where there is a more appropriate NCF fund available to the applicant, NCF will ensure they are supported to access it accordingly, providing additionality to meeting the locality priorities and maximising the reach of the available Great Yarmouth Community Investment Fund. Importantly, the Fund will seek to fill service gaps that are not currently fully funded by other commissioners; thereby seeking to complement rather than duplicate any DWP, Police, N&WCCG and Norfolk County Council commissioned services.
- 3.8 In agreeing this new strategic partnership, the Council will enter into a formal Funding Agreement with the Norfolk Community Foundation which will govern the operation, monitoring and reporting of grant giving and donations. The services the Foundation will provide to the Council are set-out in the terms and conditions provided in Appendix 2 and include:
- Support and advice – working with the NCF, the Borough Council can decide which local issues it wishes to support.
 - Support to applicants- NCF grant officers will be able to guide interested parties in applying for the funds.

- Maximised opportunities for match funding, co-financing and alignment from statutory partners, other grant-giving bodies, corporate donations, and private philanthropists.
- Removal of the administrative burden – the NCF manages the administrative and re-distribution paperwork including regulation required of a charitable trust and will provide the council with the support of its experienced team.
- A quick and straightforward set-up process in return for a 10% administrative and management charge.
- A six-month update and an annual report will be provided by NCF on how the Great Yarmouth Community Investment Fund is making a difference.

3.9 Should members agree to support this proposal, it is proposed to provide the Great Yarmouth Community Investment Fund with an annual £50,000 contribution for 2021/22 onwards to enable the Norfolk Community Foundation to set-up and launch the Fund from 1st April 2021 whilst also seeking additional contributing partner/investor funding. The proposed way forward presents a saving to the Council and an acknowledgement that the role the Norfolk Community Foundation will undertake includes identifying and securing additional match funds from other sources. This will provide additionality to the borough via a co-financed resource in the form of the Community Investment Fund.

3.10 The NCF has already demonstrated its ability to source match funding through securing two significant Great Yarmouth specific offers of donations since engaging in the Community Investment Fund dialogue with officers. Establishing the fund would also allow other local operators, such as statutory partners with shared ambitions, to contribute to the Fund. This approach to collective investment is central to our integrated system and 'Place' leadership ambitions, outlined in the emerging 2021-2026 Great Yarmouth Locality Strategy.

3.11 Longer term, it is hoped the strategic partnership with the Norfolk Community Foundation will enable the Foundation to convene a strategic dialogue with national trusts and foundations. With Great Yarmouth being a place that many grant giving bodies and corporate organisations are seeking to invest in, the NCF will be well placed to explore how multiple funders might collectively invest in the locality through a place-based investment lens, aligned to the resources and priorities of the emerging Locality Strategy.

3.12 The April 2021, timeframe for establishing the Great Yarmouth Community Investment Fund is concurrent with the existing community grants which run to 30 August 2021. This will ensure that the new Fund is ready to receive applications by currently funded VCSE organisations and/or new organisations ahead of the end of the existing scheme.

3.13 Should members choose not to adopt this strategic partnership model, then there remains an option to continue with the existing community grants scheme albeit, the value of the future funding ambition will be curtailed by the affordability of Council's medium-term financial strategy. In opting for continuation of a standalone grants scheme, officers would still recommend aligning the criteria for the scheme to the emerging Great Yarmouth Locality Strategy over-arching and shared community priorities.

4. CONCLUSION

4.1 In order to underpin and support delivery of our locality's community needs and priorities, Members are asked to consider the strategic partnering with the Norfolk Community Foundation to transition and launch a Great Yarmouth Community Investment Fund from 2021/22 onwards. The scheme will open-up

exciting new opportunities for co-financing with external funding agencies, offering an opportunity for public and private sector collaboration and support to serve the best needs of the locality.

5. FINANCIAL IMPLICATIONS

- 5.1 It is proposed to allocate £50,000 for community grants in 2021/22. Should the Norfolk Community Foundation strategic partnership be agreed this funding would be provided to the Foundation by way of a Funding Agreement. The cost of the Foundation administering a Great Yarmouth Community Investment Fund forms part of the Agreement and would be levied as a 10% charge to the Council (£5,000) in respect of its grant contribution.

6. LEGAL IMPLICATIONS

- 6.1 The unique opportunity to establish a strategic partnership with the Norfolk Community Foundation to provide the opportunity and ambition to realise a greater level of collaborative investment in our communities will be undertaken by way of a legal Funding Agreement between the Council and the Norfolk Community Foundation.

7. RECOMMENDATION

Housing & Neighbourhoods Committee resolves to:

- a) Note the achievements of the commissioned VCSE organisations in supporting local communities during the pandemic and provide advice regarding the one underspent grant allocation.
- b) Cease the current community grant scheme on 30 August 2021.
- c) Establish the Great Yarmouth Community Investment Fund through the formation of a strategic partnership with the Norfolk Community Foundation (NCF) from 1 April 2021.
- d) Provide a funding contribution of £50,000 from 2021/22 for a new community grants scheme as part of the Great Yarmouth Community Investment Fund to be administered by the NCF in line with the priorities set within the Great Yarmouth Locality Strategy and detailed in the criteria of this report at para 3.5.
- e) Delegates authority to the Strategic Director to sign a formal Funding Agreement with the Norfolk Community Foundation.
- f) Receive six-month update and an annual report by NCF on the work of the Great Yarmouth Community Investment Fund as set out in the terms of the Agreement with the Norfolk Community Foundation.

Area for consideration	Comment
Monitoring Officer Consultation:	Yes

Section 151 Officer Consultation:	Yes
Existing Council Policies:	Corporate Plan, Annual Action Plan, Great Yarmouth Locality Strategy
Financial Implications:	Yes – as set out in section 5
Legal Implications (including human rights):	Yes – as set out in section 6
Risk Implications:	Minimal – covered by Funding Agreement
Equality Issues/EQIA assessment:	Yes – completed and on file
Crime & Disorder:	N/a
Every Child Matters:	N/a

Norfolk Community Foundation – Terms & Conditions Agreement



Together, Norfolk shines brighter

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Agreement between Norfolk Community Foundation

Registered charity no. 1110817

and Great Yarmouth Borough Council)

This agreement sets out the terms and conditions under which Norfolk Community Foundation (NCF) will manage the following Fund.

*Terms used in **bold** throughout this agreement are defined in the Glossary appended.*

1. Introduction

The Fund shall be known as the Great Yarmouth Community Investment Fund

The Fund will be created as a **Revenue** Fund

The Fund will be established on receipt of the initial donation and the return of this signed agreement. Additional donations, including pecuniary legacies, can be added at any time. NCF can receive gifts in various forms, as outlined in our Gift Acceptance Policy. All donations received are irrevocable gifts, which become the property of NCF *unless specific provision is made within this agreement*.

Term of agreement – To be reviewed on an annual basis.

2. Fund purpose

The Fund can only be used for charitable purposes.

The purpose of the Fund is **restricted** to the charitable purposes as set out by the Fundholder/s in this agreement, which align with the Borough Council's Locality Strategy and/or its Corporate Plan:

- To reduce health inequality by encouraging healthier lifestyles, providing support for mental and physical health and strengthening community support.
- To improve youth education and skills pathways, attainment and create career ambition.
- To reduce vulnerability and support those at risk of exploitation.
- To reduce isolation and social exclusion by building community networks and cohesion.

Additional donations and investments should align to the above priorities, and NCF will ensure a balance of awards across these delivery agendas. Changes may be made to the purpose of the Fund subject to the agreement of NCF Trustees, receipt of a signed amendment form, and written confirmation from NCF.

3. Financial management

NCF will hold and manage the Fund exclusively for charitable purposes in accordance with the policies adopted by the Board of Trustees of NCF.

The Fund will be listed in NCF's audited accounts.

NCF will provide an annual financial report detailing the income and expenditure of the Fund. Half yearly or quarterly reports will be available on request.

4. Contribution towards the costs of NCF's charitable activities

NCF will take a contribution towards the costs of its charitable activities of 10% of the amount donated.

The contribution may be amended at NCF's discretion or if the Fundholder's requirements extend beyond NCF's standard administration processes. Any amendment to the structure or value of contributions will be notified to the donor at least three months prior to the change taking effect.

5. Area of benefit

The fund will offer support to charitable organisations based and/or clearly operating within the borough of Great Yarmouth.

6. Size of grants

The fund will administer grants of up to £10,000 in the first instance, or greater value subject to additional funds being made available in the Great Yarmouth Community Investment Fund. Term of grants to initially cover a one-year period, with a view to establish multi-year grant funding going forward e.g. an agreed sum per year, for 3 years.

7. Eligible organisations

Applicant organisations will be assessed for eligibility and suitability in line with the Foundation's established policy. Where there is a more appropriate NCF fund for the applicant, NCF will ensure they are steered accordingly, to maximise the reach of the Great Yarmouth Community Investment Fund.

The fund holder is welcome to bring to the attention of the Foundation any organisation that is eligible for funding and operating in line with Norfolk Community Foundation's charitable objects.

8. Grant decision making

The fund will be initially open for applications for a defined period, following which decisions will be made by the NCF executive team in accordance with the fund objectives. Should further funds be secured/aligned, the fund will be re-opened and advertised to encourage new applications.

NCF Trustees have ultimate responsibility to ensure that all monies are distributed for charitable purposes, in accordance with NCF's charitable objects. All grant awards are subject to ratification by the Foundation's Trustees.

9. Grant making procedures

NCF will seek applications from eligible organisations that meet the stated Fund purpose and priorities. To minimise the opportunity for this funding to duplicate alternative funded activity, in seeking applications, NCF will identify which of the fund's priority areas has either had less recourse for wider funding or is a heightened need.

As appropriate, opportunities through the Fund may be listed on NCF's website, promoted via NCF's, grants newsletters and at relevant funding events.

NCF will administer grant awards from the Fund in accordance with its Grant-Making Policy – a copy is available on request. Awardees will be informed that the grant is being made from the Great Yarmouth Community Investment Fund. NCF will distribute payments and monitor the progress of funded projects including taking any appropriate action to ensure that the grant is managed in accordance with the terms and conditions of the award.

Grant recipients will be expected to name-check the Great Yarmouth Community Investment Fund appropriately on communication & marketing assets.

A six-month update and an annual report will be provided to the Borough Council and all regular donors to the fund, showing the impact and outcomes of funded projects together with value of the Fund, donors and beneficiaries.

10. Fundraising

NCF will seek to significantly increase the size of the annual fund capacity by encouraging philanthropic donations to the fund and through strategic alliances with wider trusts and foundations. This will include targeted fundraising and awareness raising to both existing and potential NCF donors interested in supporting community-focused initiatives in the borough of Great Yarmouth.

The Fundholder/s can promote the Great Yarmouth Community Investment Fund and undertake fundraising on their own behalf only if they adhere to NCF's strict guidelines regarding the use of its charity registration number, logo and name. All promotional/ fundraising material that is publicly available in print or online must be approved by NCF in advance of its use. A copy of NCF's Fundraising Guidelines is available on request.

11. Variations

Changes may be made to this Fund agreement subject to the agreement of NCF Trustees, receipt of a signed amendment form, and written confirmation from NCF.

Signed:

_____ Donor	_____ Norfolk Community Foundation
_____ Name	_____ Name
_____ Date	_____ Date

NCF will record the information provided in this agreement on our database. It will be used to create your Fund, accurately record and process your donation/s and keep you informed about the Fund's activities. From time to time, as a Fundholder and supporter of NCF we would like to contact you with news about our general activities and to invite you to our events to hear more about our work. This will typically be via email. You can opt out of these communications at any time.

NCF takes your privacy very seriously – information about how we manage your data can be viewed in our privacy policy www.norfolkfoundation.com/privacy-policy/

☐

Please tick this box to confirm that you consent to be contacted by NCF

Appendix 1

Glossary – definition of terms

Advisor	A person with privileges in relation to a Fund which may include setting and reviewing criteria, making recommendations on grants and agreeing succession arrangements. The role has no formal part in either the governance or management of the Foundation as a whole or of its funds.
Advisory Panel	An Advisory Panel is more than one Advisor with privileges in relation to a Fund which may include setting and reviewing criteria, making recommendations on grants and agreeing succession arrangements. The Panel has no formal part in either the governance or management of the Foundation as a whole or of its funds.

Anonymous	A Fund where the identity of the Fundholder/s will not be revealed in any publicity or communications. The Donor would only be identified if NCF was legally obliged to divulge the information.
Contribution to the costs of NCF's charitable activities	The contributions taken by the Foundation from funds to support its operating costs e.g. staffing and overheads.
Discretionary	A Fund where the grant-making decisions are made exclusively by NCF Trustees for the furtherance of the Foundations charitable objectives.
Donation	A gift to charity that is irrevocable and cannot be returned to the donor.
Endowment Fund	Funds which are invested by the Foundation in its endowment, in line with its investment policy, a copy of which is available upon request. The endowment is professionally managed over the long term in order to provide financial returns to support stable and growing grant distribution across Norfolk.
Expendable Endowment	NCF's Endowed funds are managed as expendable endowment. This gives discretion to NCF Trustees to draw down capital from the investment if and when required. The Trustees will always consider the long term aim of NCF's investment strategy before making any decisions.
Fundholder	The individual/s or organisation that has created the Fund. The Fundholder/s will be named on the fund agreement.
Grant	A financial award made by the Foundation from its funds to support charitable activities, usually to registered charities or voluntary organisations, but sometimes to other bodies or individuals.
Named Fund	A fund established and held in the name of the Fundholder/s or a name of their choosing. The name of the Fund does not need to contain the name of the donor.
Restricted	Where the Fundholder has specified that the Fund's purpose is restricted to a particular charitable theme e.g. mental health or for a specific area e.g. North Norfolk.
Unrestricted	A Fund that is used for general charitable purpose in Norfolk.

