

Mid year report



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Appendix One: Compliance Statement

We ask you to fill in a Mid-year report at the mid-way point for each year of your grant. We must monitor and report externally on how your project is achieving its outcomes. This report helps us do this.

Please return this form by the date specified in the attached letter. Remember that we will not be able to release any future payments unless we have received and reviewed this form.

Please remember to sign the form before returning it to us, and also ensure that you keep a copy of this form for your records.

If you have any questions, please contact us.

Section one: Your contact details

1.1 Organisation name

Suffolk Association Of Voluntary Organisations

1.2 Unique Reference Number

BAS/3/010306108

1.3 Project name

Creating and Embedding a Learning Culture in Suffolk's Frontline Organisations

1.4 Project year

3

1.5 This report covers the period

1 July 2011 to 31 December 2011

Section two: Your project's achievements and progress

2.1 Tell us about your progress towards achieving your project outcomes. It is important that you let us know which of your milestones have been achieved. If there has been a delay, tell us the impact on achieving the outcome.

Project outcome 1:

Outcome: 1,000 frontline organisations to receive higher quality funding / management / development advice by April 2014 from INS members thereby improving their capacity building and sustainability. INS to collate data to produce major sustainable five year business plan 2014 onwards.

Milestone: 1a - Agree targets and plans for the project. Local LIPs provide plans on spending the funding work allocation. Submit Business Plan to the Lottery.

Timescale: End of month 2

Milestone: 1b - Courses attended, advice and development work given to 500 organisations. Trainers Network established and running with 25 members.

Timescale: End of month 36

Milestone: 1c - Major survey of VCS organisations across the county to measure funding progress, levels of learning and skills, skills development and organisation sustainability. Findings reviewed and report written.

Timescale: End of month 48

Milestone: 1d - Writing of five year skills and funding development county Business Plan 2014 - 2019.

Timescale: End of month 54

Milestone: 1e - Courses attended, advice and development work given to 1000 organisations across Suffolk. Trainers Network has at least 50 members.

Timescale: End of month 60

Milestone: 1f - Skills audit completed amongst project INS members to measure level of learning and skills to demonstrate how INS staff have developed their skills during the project.

Timescale: End of month 60

In the space provided below please tell us more about your progress towards achieving this outcome. Explain how you have achieved the milestones and how you have measured this. Show progress towards numbers where appropriate and towards planned timescales. If you did not achieve the milestones within the planned timescales, tell us how this will affect your project.

The significant reduction in funding for most voluntary organisations since April 2011 has resulted in many organisations having to downsize / reduce services, and in extreme cases organisations have had to close. Whilst this has somewhat reduced the take up of courses / events delivered by our partners, it has seen an increase in take up of our online toolkits / resources. Over 800 toolkits have been downloaded by the end of December.

Milestone 1a: We have already reached the 36 month target for engagement, having provided training and or Information, Advice and Guidance for at least 550 organisations, through local sessions run by Partners (measured by attendance records) and use of Practical Toolkits (measured by 'sign-ups' / website 'hits').

All members of the Suffolk Learning Consortium are automatically signed up to the Trainers Network; 115 Training Network members (target 25).

Supporting information for our data gathering and auditing methods was provided as an Appendix to our last report.

Project outcome 2:

Outcome: Increased professionalism in good funding development advice/mentoring across Suffolk by creating a funding network (100 members), including funding mentors, developing good practice funding bids (50) to raise standards and increase success rates / diversity of funding amongst frontline organisations.

Milestone: 2a - Develop an operational plan for the Funding Network - its remit, its plan of work. Develop forms for recruiting funding mentors.

Timescale: End of month 8

Milestone: 2b - Publicise Funding Network and attract 20 initial members including 10 funding mentors. Create/find 5 good practice funding bids.

Timescale: End of month 12

Milestone: 2c - 50 Funding Network members, including 20 funding mentors. 15 good practice funding bids available.

Timescale: End of month 30

Milestone: 2d - 75 Funding Network members, 30 funding mentors. 30 good practice funding bids available.

Timescale: End of month 36

Milestone: 2e - 100 Funding Network members, 45 funding mentors. 40 good practice funding bids available.

Timescale: End of month 48

Milestone: 2f - 100 Funding Network members, 50 funding mentors. 50 good practice funding bids available.

Timescale: End of month 60

In the space provided below please tell us more about your progress towards achieving this outcome. Explain how you have achieved the milestones and how you

have measured this. If you did not achieve the milestones within the planned timescales, tell us how this will affect your project.

As with Outcome 1, the current pressures on organisations is making it difficult to get support to progress our tasks (despite the fact that now is probably the most important time to progress collaboration in seeking funding).

Milestone 2c - All members of the Suffolk Learning Consortium are automatically signed up to the Funding Network; 115 Funding Network members (target 50). We are still short of the targets for Funding Mentors (16 out of 20) and Good Practice Funding Bids (12 out of 15), but these are improvements against 6 months ago, thanks to our collaboration in the learnEAST network (www.learneast.org.uk) who took over ownership of a number of Good Practice Funding Applications (and funding guides) which had been produced by Inspire East who had now dissolved.

The BASIS1 project team are currently preparing to launch a new website (www.fundingsuffolk.org) to which we will migrate all the information and services developed under the BASIS2 project. We have also had the use of Funding Mentors so we hope to use these as examples to engage more take-up of the project's funding mentoring service.

Project outcome 3:

Outcome: Production of sustainable resources for INS members (40 course outlines, tutor notes and resources, production of five new practical toolkits on governance, management, planning topics) to train and support frontline organisations to improve and develop sustainable services for their beneficiaries.

Milestone: 3a - Agreement as to what courses/subject matter will be written up as course outlines, resources and toolkits.

Timescale: End of month 2

Milestone: 3b - Eight course outlines/topics written and available with wide range of handouts and resources. Current toolkits revised. One new toolkit written and available in hard copy and electronic form.

Timescale: End of month 12

Milestone: 3c - Eight course outlines/topics written and available with wide range of handouts and resources. One new toolkit written and available in hard copy and electronic form.

Timescale: End of month 24

Milestone: 3d - Eight course outlines/topics written and available with wide range of handouts and resources. Revision of previously published resources and toolkits. One new toolkit written and available in hard copy and electronic form.

Timescale: End of month 36

Milestone: 3e - Eight course outlines/topics written and available with wide range of handouts and resources. One new toolkit written and available in hard copy and electronic form.

Timescale: End of month 48

Milestone: 3f - Eight course outlines/topics written and available with wide range of handouts and resources. Revision of previously published resources and toolkits. One new toolkit written and available in hard copy and electronic form. (Grand total: 40 course topics, five new toolkits).
Timescale: End of month 60

In the space provided below please tell us more about your progress towards achieving this outcome. Explain how you have achieved the milestones and how you have measured this. If you did not achieve the milestones within the planned timescales, tell us how this will affect your project.

We are currently well on target for the production of sustainable resources. Sustainability is always a key issue as there are two lines of thought: Resources developed under a funded project should be made available to all at no charge (as is supported by Open Educational Resources), against funders wanting organisations to become less dependant on funding by selling their services. We are supporting both arguments; we have provided the content of our TrusteElearning course to OpenLearn (the Open University have reported that since publishing free resources on OpenLearn the takeup of their paid for courses has increased). We are also in conversation with a number of CVSs about rebranding and localising our Practical Toolkits as a revenue stream. Later in January we are meeting with the Charity Commission who have expressed interest and appreciation of our Trustee e-learning programme. We are also engaged in an LSIS funded project to develop a Moodle which is shared between voluntary organisations and Suffolk County Council, with the view to providing a rationalised training portfolio across the county, delivered on-line to reduce delivery costs. Associated with this is an NLDC funded project to deliver a full range of ASDAN accredited courses for volunteers, which if successful we can rollout nationally as an income generator. Milestone 3d: We currently have 11 Practical Toolkits (including TrusteElearning) and 17 Course Outlines produced, with a wide range of handouts and resources. During the Autumn we launched the second edition of the Bigger Orange Book of Volunteering and are currently working on a practical online toolkit to work alongside the paper booklet. Four new course outlines are currently being written.

Project outcome 4:

Outcome: Developing workshops / mentoring on different quality standards, helping 50 organisations to achieve appropriate quality standards and to train up Learning Champions within frontline organisations to improve their standards and best practice in service delivery and develop a more skilled VCS workforce.

Milestone: 4a - Include initial work plan re. quality standards work in business plan.
Timescale: End of month 2

Milestone: 4b - Review current state of organisations and what quality standards they have/are interested in by mini-survey. Produce recommendations for taking quality standards work forward.
Timescale: End of month 12

Milestone: 4c - Create workshop programme on different quality standards and provide mentoring 12 organisations worked with.
 Timescale: End of month 24

Milestone: 4d - Workshop programme and mentoring organisations running total of 25 organisations worked with.
 Timescale: End of month 36

Milestone: 4e - Workshop programme and mentoring organisations running total of 40 organisations worked with.
 Timescale: End of month 48

Milestone: 4f - Workshop programme and mentoring organisations running total of 50 organisations worked with.
 Timescale: End of month 60

In the space provided below please tell us more about your progress towards achieving this outcome. Explain how you have achieved the milestones and how you have measured this. If you did not achieve the milestones within the planned timescales, tell us how this will affect your project.

The Learning Champions programme continues with 25 champions registered and most of them active. Despite the current financial situation it is generally recognised that it is important for organisations to hold a recognised Quality Standard, particularly when applying for funding
 Milestone 4d: Local Infrastructure Partners have continued to provide support to organisations through workshops across the county, and this has been backed up by mentoring provided by Young Suffolk (on their Quality Standard for youth organisations) and SAVO (on PQASSO).
 As such we are on target having provided mentoring to 25 organisations.

Section three: Staff Information

3.1 Please provide in the space below the name(s) of any new posts funded by us in the last year, their salary and their start and, if appropriate, end dates. You should keep details of the recruitment process as we might ask for them later.

Post	Post holder's name	Full time or part-time	Salary £	Big Lottery Fund cost £	Dates of employment	Length of contract

Financial Information

In this section we ask you about expenditure and income related to your project. We ask you to tell us what costs were incurred during the last six months and how these costs were met. We also ask you to confirm your proposed expenditure and income for the next six months. Please note that you may need to explain how you reached your budget figures. Please therefore, keep all your calculations readily available.

3.2 Please tell us how you have spent your grant in the last six months.

This review covers the period from:

This review covers the period to:

July 1st 2011

December 31st 2011

How much have you received from the Big Lottery Fund to the end of this review period? *

£44,786

How much of the Big lottery Fund's revenue funding have you spent to the end of this statement period?

£50,895

How much of the Big lottery Fund's capital funding have you spent to the end of this statement period (if applicable)?

£N/A

Balance left, (if any)?

£- 6,109

Tell us the total income, including from other funding sources and your Big Lottery Fund grant that you have received for the project during this review period?

£50,954
(This includes £6,168 underspend from the previous year)

Tell us the total expenditure on the project during the statement period?

£50,895

* For the first six months of the project, these are the costs agreed with you as part of the Starting your grant form. (The first Mid-year form should also show any eligible lead-in costs relating to the development of the business plan).

3.3 If there is a significant difference between the funding received and the grant actually spent, for this mid-year point. Tell us the reasons for this and about any potential impact this might have on the project.

Expenditure overall is on budget, given that some costs are weighted towards the beginning of the year and others towards the end of the year. We have virtually caught up on the underspend from the previous year.

Section four: Signatures

4.1 This form must be signed and dated by an authorised signatory. The mid-year form is considered incomplete unless it is attached to the declaration.

- I declare that to the best of my knowledge, the information given in our Mid-year form is correct and complete.
- I understand that the information provided in our Mid-year form may be circulated and discussed with any person or organisations helping the Big Lottery Fund evaluate our project.
- I have read the Compliance statement (attached as Appendix one) and confirm that my organisation has complied with every item.
- I confirm that the management committee or governing body knows about this Mid-year report and that all sections have been completed and that as far as I am aware all the information given in this report is accurate.

Title

Mr

Forenames (in full)

Robin

Surname

Hodgkinson

Position in organisation

Training Manager

Signature

Robin Hodgkinson

Date

Appendix one: Compliance statement

Tick boxes to certify that:

- | | |
|---|-------------------------------------|
| 1. We have the necessary insurance cover in place for the project supported by the Big Lottery Fund grant. | <input checked="" type="checkbox"/> |
| 2. We have taken steps to meet our statutory obligations as they apply to our project. | <input checked="" type="checkbox"/> |
| 3. We have paid reasonable prices for the services and resources bought to carry out this project. | <input checked="" type="checkbox"/> |
| 4. We are using this grant to carry out the project as described in our application. | <input checked="" type="checkbox"/> |
| 5. We will seek the Big Lottery Fund's approval before making any significant changes to our project. We understand that if we do not do this, the Big lottery Fund may require us to repay all, or part, of the grant. | <input checked="" type="checkbox"/> |
| 6. We retain all supporting documentation relating to grant expenditure and these documents can be provided for examination if required. | <input checked="" type="checkbox"/> |
| 7. There have been no major changes to this project during the last 12 months other than what we have told the Big Lottery Fund about which have received written approval. | <input checked="" type="checkbox"/> |