



AGENDA ITEM NO. 5

Dundry View Neighbourhood Partnership 10th February 2014

Report of: Keith Houghton, Area Coordinator, Neighbourhoods

Title: Wellbeing Fund Review Report

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RECOMMENDATIONS

1. That the Neighbourhood Committee approves the recommended changes to the Wellbeing Fund Panel Terms of Reference, Wellbeing application form; Wellbeing Fund criteria and Wellbeing Panel assessment process set out in Sections **2.1; 2.2; 2.3; 2.4**
2. Notes the legal information which guides all decisions about Wellbeing grant funding (**Paragraph 10**)

1 Background

- 1.1 Dundry View Neighbourhood Partnership has £30,000 of Wellbeing funding as a devolved budget for the 2013/2014 financial year to spend on projects that promote the wellbeing of people in Bishopsworth, Hartcliffe and Whitchurch Park.
- 1.2 The current Wellbeing Terms of Reference, Funding applications form and Assessment Panel process has run for a number of years in Dundry View. The number of applications to the Fund has increased pressure on the money available – the 2013/14 Fund was fully committed in December 2013. The Wellbeing Panel decided to review how the Wellbeing fund functions in July 2013. It examined the suitability of Terms of Reference; the Application form; how applications are assessed and decisions recorded; criteria in guidance; running of Wellbeing Panel meetings and relationship between Wellbeing and Community First fund

2 Outcome of the Review and Proposed Amendments

2.1 Terms of Reference

The following amendments to the Wellbeing Panel ToR are recommended:

ADD to Introduction

‘The funding is for projects that promote the wellbeing of local residents, **deliver against the Dundry View Neighbourhood Partnership’s Action Plan Priorities** and are delivering sustainable improvements to the neighbourhood. Local groups and service providers are invited to bid for up to **£X,XXX (insert agreed limit)** of Wellbeing funding using an application process agreed by the Neighbourhood Partnership.’

2.2 Wellbeing Application Form

The following amendments to the Wellbeing Application Form are recommended:

Current Form	Proposed Form	Reason
Q1. Which area of Dundry View do you plan to work in?	Q1. Which area of Dundry View do you plan to work in?	No change proposed
2. Your details:	2. Your details:	No change proposed
3. Please tell us briefly about your group or organisation: What do you do?	3. Please tell us briefly about your group or organisation: What do you do?	No change proposed
4. Please tell us about the piece of work you are asking us to fund and who the project is aimed at.	4. Please tell us about the piece of work you are asking us to fund and who the project is aimed at.	No change proposed
5. When will the piece of work take place?	5. When will the piece of work take place?	No change proposed
6. Why is your project needed? – Please also state how you have	6. Why is your project needed? – Please also state how you have	No change proposed

Current Form	Proposed Form	Reason
consulted with your client group.	consulted with your client group.	
7. How are you going to involve the wider community with your project?	7. How are you going to involve the wider community with your project?	No change proposed
8. How are you going to advertise your project? Can you help to advertise the Neighbourhood Partnership and the Wellbeing funding?	8. How are you going to advertise your project? Can you help to advertise the Neighbourhood Partnership and the Wellbeing funding?	No change proposed
9. Impact of your piece of work a) How many people in total will your project benefit? b) Please state how your project fits the Dundry View Neighbourhood Partnership Priorities.	9. Impact of your piece of work a) How many people in total will your project benefit? b) Please state how your project fits the Dundry View Neighbourhood Partnership Priorities.	No change proposed
10. a) How much money are you asking for? b) Who else are you asking for funding, and how much funding have you already got? c) How many volunteers will be involved in this project and how many hours will each volunteer	10. a) How much money are you asking for? b) Who else are you asking for funding, and how much funding have you already got? c) How many volunteers will be involved in this project and how many hours will each volunteer	Change to Community First question: it's no longer possible to enable organisations to apply for Wellbeing and Community First using the same application form because Community First have changed their application questions. They are now more specific to that funding process. Applicants now have to complete a separate Community

Current Form	Proposed Form	Reason
<p>work?</p> <p>d) Please indicate if you are happy to be put forward for Community First funding from the Community Development Foundation?: Yes/No</p>	<p>work?</p> <p>d) Please indicate if you are happy to be put forward for Bishopsworth or Whitchurch Park Community First funding from the Community Development Foundation: Yes/No IF YES AND YOU WANT TO BE CONSIDERED FOR THIS YOU WILL NEED TO COMPLETE A SEPARATE COMMUNITY FIRST APPLICATION.</p>	<p>First application.</p>
<p>11. Please set out a breakdown of the total costs of your piece of work showing us which items you are asking us to fund and which are being funded from another source.</p>	<p>11. Making sure your project benefits all relevant people in the Neighbourhood</p> <p>Please tell us how you will make sure your piece of work or project benefits/welcomes all relevant groups in the Neighbourhood, particularly those groups who are sometimes left out, discriminated against or disadvantaged (often called ‘equalities groups’). You don’t have to say something for every group – just the ones you can show your project will benefit</p>	<p>New section: current form doesn’t supply any information on benefits to equalities communities. This makes it impossible for the Assessment Panel to assess and advise the Councillors on the Partnership on how their decisions address the Public Sector Equalities Duty. This information will now be included in the Wellbeing reports to future NP meetings</p>

Current Form	Proposed Form	Reason
<p>12. Does your group have a bank/building society account and do cheques need to be signed by two or more signatories? If yes, please provide details of the account so we can pay your grant into it if you are successful. If no, please go to question 13.</p>	<p>12. Please set out a breakdown of the total costs of your piece of work showing us which items you are asking us to fund and which are being funded from another source.</p>	<p>No change to content proposed</p>
<p>13. If you answered No to question 12 above, we will need the details of an account where there are two signatories required. Please tell us below which group will receive a grant on your behalf for this piece of work.</p>	<p>13. If you are awarded less money than you are asking for will your project/piece of work be able to go ahead? If it will explain briefly how:</p>	<p>New section: Assessment Panel now regularly assesses funding requests in excess of funding available. This section helps the Panel make awards for less than the full sum requested</p>
	<p>14. Does your group have a bank/building society account and do cheques need to be signed by two or more signatories? If yes, please provide details of the account so we can pay your grant into it if you are successful. If no, please go to question 15:</p>	<p>No change to content proposed</p>
	<p>15. If you answered No to question 14 above, we will need the details of an account where there are two signatories</p>	<p>No change to content proposed</p>

Current Form	Proposed Form	Reason
	<p>required. Please tell us below which group will receive a grant on your behalf for this piece of work</p>	
	<p>16. Good Practice Does your group have the following policies?</p>	<p>New section: this enables the NP team to assess if a group is delivering a proposed project safely. It also help identify where a group could develop its governance to improve its ability to draw in more funding if it wants to.</p>
	<p>a. Does your group have a formal constitution?</p>	
	<p>b. A Safeguarding Policy (this is required if you are working with Children and Young People or Vulnerable People)</p>	
	<p>c. Public Liability Insurance - this may also be required if you are working with the general public.</p>	
	<p>d. An Equal Opportunities Policy</p>	
	<p>e. A Health and Safety Policy</p>	
	<p>If the answer to the above is 'no' it might be helpful to your group for future fundraising to have these policies in place. Please tick the box if you would like some support to put these policies in place.</p>	

2.3 Panel Assessment process and recording of decisions

The Panel agreed to trial a new assessment system in August 2013.

The new assessment system applies a score from 0-3 against a range of criteria for each application. These scores are made during the assessment panel meeting. Every member of the panel contributes their individual score and the total is averaged. Each application can score a maximum of 18 points; 9 is the minimum score for an application to be eligible to be recommended to the Neighbourhood Committee for funding. Once all projects are scored a funding recommendation is then discussed and voted on by the Panel for each eligible application

The Panel recommends that this assessment is adopted as the formal assessment process for Wellbeing Grant assessment.

2.4 Proposed changes to Wellbeing criteria

The Panel considered a number of recurring requests for funding which can produce inconsistent decisions by the Panel. **The Panel recommends the following new criteria be adopted as part of the guidance to Wellbeing applicants from April 2014:**

Topic	Proposed Criteria	Reason
Building improvements outside Dundry View area	No funding to be given to improve physical buildings outside of the boundary.	Dundry View Wellbeing funding should only improve resources in the area
Local benefit	The project has to benefit residents who live within DVNP area	Projects should demonstrate very clear local benefit
Group trips	Limit of £250 for a trip	This is a popular request and the Panel wants to be equitable in level of awards to all
	No funding for food on trips	This is considered as something trip participants should supply themselves

Topic	Proposed Criteria	Reason
	Maximum of one per group in a financial year	This is a popular request and the Panel wants to be equitable in level of awards to all
Celebratory meals	No funding for Christmas or celebratory meals	This is a popular request which could overstretch the Fund
	The maximum amount that groups can apply for is up to 15% of the total grant for volunteer costs.	Panel recognised that Volunteers are often key to projects happening and enable residents to gain skills for work but want to set a maximum proportion of total costs.
Maximum upper limit per bid	£3,000	This is a reduction from £5,000. £5,000 was set when DV had considerable underspend in Wellbeing to distribute. This is no longer the case and requests exceed available funding at every Panel. A new upper limit on bids enables more groups to be supported.

2.5 Changes to the relationship between Wellbeing and Community First

The original working relationship between Wellbeing and Community First was set up so that a. groups could use one application form to access both funds and b. the Wellbeing Panel could work with the Community First Panels to support project flexibly using whichever Fund was most appropriate.

The changes made by Community First to their application process makes a single application form no longer feasible. All applicants now need to complete separate applications to access each Fund. The Wellbeing

Panel is aware of bids to Community First and vice versa, however, so decisions are made with full information available to each Panel of how they can ensure their decisions make best use of both funding sources.

3. Legal Information

When councillors decide how the wellbeing fund is spent they should have due regard to the public sector equality duty that applies to all public bodies. This duty is contained in the Equality Act 2010 and came in to force on 6 April 2011. It replaces previous equality duties under the Sex Discrimination, Race Relations and Disability Discrimination Acts.

The duty means that councillors are required to have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited under the Act
- Promote equality of opportunity between different groups
- Foster good relations between people from different groups

The duty covers the following protected characteristics:

- Disability, Sexual orientation, Age, Gender reassignment, Religion and belief; Sex, Race, Pregnancy and maternity.

It also applies to marriage and civil partnership, but only in respect of the requirement to eliminate discrimination and harassment.