****

**Consultancy Brief (15/8/2017)**

|  |  |
| --- | --- |
| **Project Name:** | **Small Grants Programme Review:**  **Peter Minet Trust and United St Saviour’s Charity** |
| **Project Lead:** | Matthew Allgood (United St Saviour’s Charity) |
| **Project Group:** | Rachel Oglethorpe  Sarah Thurman  Matthew Allgood |
|  |  |
| **Context and rationale:** | Peter Minet Trust (PM) and United St Saviour’s Charity (UStSC) are independent, place-based funders, based in South London, operating ‘Small Grants’ programme\* offering one-off grants of £5k and under. PM and UStSC are undertaking this project together as, despite some differences, there is much common ground; we know one another and feel there is much to be gained from pooling our collective knowledge, experience and data.  Both organisations have operated small grants programmes for a number of years and are keen to understand more about the value they deliver. The review will help to inform the development of their respective grants programmes (what programmes they run) and the way that the organisations work with grantees and other funders (how they work). Ultimately the two trusts want to maximise the impact of their work by focusing limited funds more strategically.  Neither organisation has conducted a recent review of its small grants funds, and see this project also as an opportunity to produce a document that highlights and celebrates the impact the funds have made over the past 3 years.  The section below provides more detail each trust.  Peter Minet Trust:  PM is undertaking a major strategic review of its grant giving to develop a more confident and strategic approach to funding, based on a greater understanding of the value of its giving. PM wants to maximise the difference it makes with its limited funds and human resources.  PM currently distributes around £160k pa in one-off grants of £5k and under within Southwark and Lambeth, including very small programme of grants of £500 and under. PM operates a traditional, reactive grant-giving model, responding to applications from UK registered charities through an open, online application process. Monitoring is light touch. Grants are largely for time-limited projects, events or a contribution to the annual costs of a particular programme. Its criteria are currently very general (UK registered charities improving the quality of life for those in need).  Demand for grants has increased, as well as the level of the average grant (now £4.2k), leading towards success rates dropping from 44% to 22% over the last 5 years which is unsustainable for PM and for organisations applying and is not good practice. PM has suspended its programmes in July 2017 as it works towards a new approach later in 2018  Anecdotally, PM has received conflicting feedback from organisations. Many small grants seem to make a real difference, whether for one-off events or on-going programmes. However, we also hear that some charities find applying for multiple small grants a real challenge, and their urgent need is for slightly larger multi-year funding for core costs.  .  United St Saviour’s Charity  UStSC distributes around £850k pa across north Southwark to charities and local groups. £150k of this is allocated towards the small grants programme. Small grants tend to be focused on community cohesion-type, one off, activities, with an average grant of £2k. Last year 63% of small grants recipients were unincorporated (community) groups and TRAs (Tenants and Residents Associations).  In 2016 the charity undertook a strategic review of its overall grant-making and has now introduced specific funding themes and new processes. It has not made any changes to the split between small and large grants. A recent decision to introduce strategic grant-making alongside the open access grants programme will result in increased pressure on the organisation’s staff time as well as the small grants pot. As such, the charity needs to find ways of maximising the impact of a potentially reduced budget for it’s under £5k programme.    Anecdotally, the charity feels that the small grants programme makes a difference to a large number of organisations and communities but this has never been quantified. It is also important to note that running the small grants programme is relatively time consuming, in staff and administration terms.  \**For the purpose of this exercise we shall all use the generic term ‘Small Grants’ for this level of grant. Please note that UStSC uses the term ‘Community Engagement’ for this programme and Peter Minet Trust has used ‘Main Grants’ for £5k and under, as well as ‘Small Grants’ for £500 and under. Please also note that UStSC also has Community Investment Programme offering larger amounts but this is not the subject of this brief.* |
|  |  |
| **Aims:** | 1. To better understand the value and importance of the small grants to the recipient groups (and to the two trusts) 2. To explore how the two grants programmes could be developed to maximise their impact and value (particularly thinking about what makes sense in terms of staff time, resources available, and in terms of the local organisational/funding environment) 3. To capture and celebrate the difference (impact) the small grants programmes have made over the past 3 years. This is not intended to be an evaluation of the programmes but more of a light touch assessment. |
|  |  |
| **Research questions:** | 1. What value do our small grants have? (What is the value they bring/have delivered to our partners/different kinds of partners/different kinds of projects? What value do they deliver to each trust?) 2. What are the main challenges facing our partners in securing funding, and what can the two trusts do to help? 3. What have our small grants programmes achieved over the past 3 years (extent and impact)? 4. How should we (re) focus our grants programmes to maximise their value and longer term impact? (What kind of grants/what size of grants/to what kind of organisations (nature or size) /in what form…..?) |
|  |  |
| **Deliverables:** | * A report with findings and recommendations in relation to research questions 1,2 and 4 – for internal use only. To include joint recommendations and recommendations specific to each trust. * A document (format to be agreed) relating to research question 3 highlighting achievements and impact of the two programmes – external facing/communications document. |
|  |  |
| **Timeframes:** | Appointment of consultant(s) by 22nd September 2017  Completion of project by 24 November 2017 |
|  |  |
| **Methodology:** | Exact methodology to be agreed, but likely to include:   1. Meeting with clients and consultant to work up brief and approach 2. Desk based assessment of data and records (provided by PM and UStSC) 3. Review of existing research 4. Workshop to review what ‘value’ means – to PM, UStSC and partners 5. Interviews with grantees (names and contacts to be provided) 6. Mid-way reflection/review of findings with clients (staff and trustees) 7. Production of reports and recommendations |
|  |  |
| **Risks:** | * The review might raise concerns amongst our partners about changes in funding approaches on the part of each trust * The review raises expectations amongst partners |
|  |  |
| **Other information:** | United St Saviour’s Charity is registered no. 1103731 www.ustsc.org.uk  The Peter Minet Trust is registered charity no. 259963/ [www.peterminet.org.uk](http://www.peterminet.org.uk)  Information to be provided by the trusts will include:   * List of Grantees and projects funded through small grants programmes 2014-2016 * Summary of information on grant giving levels, average grant, Success/Turn Down rates, Sizes of organisations funded, borough of beneficiaries   Useful resources (not inclusive):  [*http://esmeefairbairn.org.uk/news-and-learning/news-and-events/listening-for-change-two-sides-of-the-same-coin*](http://esmeefairbairn.org.uk/news-and-learning/news-and-events/listening-for-change-two-sides-of-the-same-coin)  [*https://blogs.ncvo.org.uk/2017/05/04/core-funding-is-an-investment-not-a-safety-blanket/*](https://blogs.ncvo.org.uk/2017/05/04/core-funding-is-an-investment-not-a-safety-blanket/) |
|  |  |
| **Contact details:** | **Matthew Allgood: Matthew.Allgood@ustsc.org.uk**  Rachel Oglethorpe (Peter Minet Trust): [info@peterminet.org.uk](mailto:info@peterminet.org.uk)  Sarah Thurman (UStSC): Sthurman@ustsc.org.uk |

Version: Final (15/8/17)