

Committee: Cabinet

Date: 19 September 2022

Wards: All

Subject: Merton Civic Pride Fund: Supporting the Voluntary and Community Sector 2023/26 - commissioning requirements

Lead officer: John Dimmer, Interim Head of Corporate Policy and Improvement, Corporate Services
Keith Burns, Interim Assistant Director, Commissioning, Community & Housing
Keith Shipman, Education Inclusion Manager, Children, Schools and Families

Lead member: Councillor Eleanor Stringer, Deputy Leader and Cabinet Member for Civic Pride
Councillor Peter McCabe, Cabinet Member for Health and Social Care
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Recommendations:

1. To approve the aligning of a range of information, advice and preventative support services into an expanded 'Supporting the Voluntary and Community Sector' programme which sits under the umbrella of the Civic Pride Fund (see section 1.2-1.5).
 2. To approve the Prospectus as the basis on which to fund these services (see section 3.11-3.15).
 3. To note the funding available for 2023-26 and to approve the proposed allocations against each of the programme themes (see section 7).
 4. To approve the scoring methodology and weighting to select providers (see section 3.19).
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1 PURPOSE OF REPORT AND EXECUTIVE SUMMARY

- 1.1 This report provides Members with details of work which has been undertaken to recommission the council's Strategic Partner Programme (SPP) and the process moving forward. This has involved extensive engagement with the voluntary and community sector (VCS); benchmarking and research into the national, regional and local context; and the aligning of related funding.

- 1.2 Civic Pride is one of the new administration's key priorities for Merton. It has been proposed that all core funding that goes to voluntary sector and the local area should come under the overarching umbrella of a Merton 'Civic Pride Fund' (CPF). This reflects our commitment to putting Civic Pride at the heart of our borough. We want Merton to be a place where people are proud to live, work and study: where everyone can thrive, and where we embrace the strength and diversity of our communities.
- 1.3 Under this umbrella fund, the current Strategic Partner Programme has been renamed the 'Supporting the Voluntary and Community Sector' fund to reflect our commitment to investing in the local VCS infrastructure to support our local communities.
- 1.4 Also included under this wider umbrella is a separate 'Investing in Neighbourhoods' fund (formally Neighbourhood Community Infrastructure Levy (CIL) fund). Proposals for this year's fund will also be submitted to Cabinet in September and we will look at opportunities for further alignment from next financial year.
- 1.5 We are proposing an expanded Civic Pride Fund: Supporting the Voluntary and Community Sector 2023-26 that has four pots of aligned funding, which are aligned with the council's 'Working Better With Communities' framework, as further outlined further at 2.8:
- Services that provide help
 - Services that grow strengths and capabilities
 - Active, supportive communities
 - An enabling system and place
- 1.6 The Supporting the Voluntary and Community Sector fund brings together multiple funding pots under one single grants process.
- 1.7 Despite the ongoing financial challenges facing councils, Merton Council have committed to invest in this refreshed programme, with an increase in overall funding for 2023-26.
- 1.8 We intend to invite bids for funding in October 2022 based on commissioning requirements set out in a funding prospectus which has been developed through a Collaborative Working Group. The draft funding prospectus is set out at Appendix 2. This report also sets out the process for awarding funding and the timetable.
- 1.9 The Working Better with Communities framework and the funding prospectus have both been co-designed with the sector.

2 BACKGROUND

- 2.1 Merton's current Strategic Partner Programme (SPP) 2019-23 aims to invest in and support Merton's local infrastructure. The programme has brought together information, advice and support services in the community which provide low level preventative interventions that strengthen Merton resident's physical, social, emotional, and economic resilience and contribute to reducing inequalities in Merton.
- 2.2 The current Strategic Partners and wider VCS have demonstrated their value in both their response to the pandemic and supporting residents most in need in challenging times. As part of the wider support offer, strategic partners have provided advice and support on the EU settlement scheme. The SPP plays a key role in the changing economic environment and supports the transition to living

safely and fairly with COVID-19 and would respond quickly to any surge response. As well as supporting VCS service delivery, the grants provide a partnership network that we can call on in times of need. For example, the current support to Ukrainian refugees and host families has been led within the VCS by the Polish Family Association and Commonsense Trust, working closely with the Merton Community Hub.

- 2.3 The pandemic has shone a light on existing inequalities, both in terms of the direct impact of infection but also the indirect economic and social impacts. The demand and level of complexity to information, advice and support services is rapidly increasing due to the rising cost of living. The VCS are currently working in partnership with the council to support Merton residents and are actively involved in the Food Poverty Action Plan and Fuel Poverty Sub Group. This report recommends that this support needs to be integral to the programme going forward and further investment of £600,000 from the council has been agreed over three years to help mitigate this. Further details of funding available are included in Section 7 of this report.
- 2.4 In Merton, there is significant correlation between socio-economic inequalities and geography, with the east of the borough being more deprived than the more affluent west. Tackling inequalities, especially health inequalities and ‘bridging the gap’ between the east and west of Merton, is at the heart of the prevention agenda and needs to be taken across the whole life course so that all Merton residents can start well, live well and age well.
- 2.5 The programme makes best use of Social Value by securing social, economic, and environmental benefits to the services provided. For example, using volunteers and community spaces. Strategic Partners are encouraged to seek additional external funding, although this is increasingly difficult to secure. In addition, the VCS organisations are struggling financially with inflationary pressures and the rising costs of energy. The increase will also acknowledge the inflationary pressures in the system alongside the demand pressures.
- 2.6 The proposed aims of the new 2023-26 Civic Pride Fund: Supporting the Voluntary and Community Sector are to:
- Invest in and support Merton’s local voluntary and community infrastructure.
 - Nurture a strong sense of community and reduce inequalities.
 - Bring together preventative services that provide information, advice and support in the community to strengthen Merton resident’s physical, social, emotional, and economic resilience.
- 2.7 In order to achieve these aims, the Fund is divided into four themes. These themes align with Merton Council’s new Working Better With Communities framework which was developed and agreed by the council’s Corporate Management Team as part of the cross-cutting corporate Transforming How We Work with Communities Project. The recommissioning of this funding provides a valuable opportunity to put this framework into practice. The themes are specifically focused around areas where people may find help and support in Merton. Organisations will be able to apply for funding against one or more theme:
1. **Services that provide help:** the services that provide emergency assistance to people in crisis and direct help to adults in need.
 2. **Services that grow strengths and capabilities:** the services that provide good quality information, support and non-accredited advice, accredited

advice and casework and specialist and/or legal representation where necessary.

3. **Active, supportive communities:** the services that co-design support and solutions with people and communities to help grow their relationships and connections and increase their level of activity. This will include low level preventative activities and Healthwatch Merton.
 4. **An enabling system and place:** the services that help to support an enabling system and place. This will include voluntary and community sector infrastructure support and the provision of small grants.
- 2.8 Officers have been working with a Collaborative Working Group of voluntary sector representatives and service commissioners to develop a set of commissioning requirements that form the basis of the draft Funding Prospectus that will be used to invite bids for funding from the voluntary sector. In addition, service commissioners from across the Merton Partnership have been discussing what funding could be either pooled or aligned with the programme.

3 ANALYSIS

Co-design and the process thus far

- 3.1 The recommissioning process was launched with an engagement event on 27 April 2022 which was attended by approximately 50 voluntary and public sector representatives. The outputs from the workshop have informed the development of the funding prospectus.
- 3.2 A task and finish 'Collaborative Working Group' drawn from attendees at the April engagement event was set up, with membership from 17 organisations. This was attended by representatives from across the council, Integrated Care Board (ICB): the local health commissioner, and voluntary sector, including those that are funded by the current programme and some who are not. The meeting was initially chaired between Keith Burns, Interim Assistant Director of Commissioning, Community & Housing and then following agreement by the working group to find an independent chair, the chairing role was taken over by Simon Breeze, Chief Executive of Sutton Community Action.
- 3.3 This Collaborative Working Group met on five occasions over a period of three months, and meetings were themed in order to use the time to best effect.
- 3.4 Discussions in this group helped to shape the draft funding prospectus which has now been developed. The outcomes identified by the group formed the basis of much of the funding prospectus.
- 3.5 This process of co-production facilitated through the Collaborative Working Group is clearly evident in the draft prospectus and has had a positive impact on the council's relationship with the voluntary sector.

Commissioning process and additional funding streams

- 3.6 Conversations have taken place between the core grants team and commissioning managers throughout the council and wider, to consider the possibility of pooling or aligning funding pots. Various commissioners from across the council and ICB have also been represented on the Collaborative Working Group.
- 3.7 As outlined at 1.4, proposals for this year's 'Investing in Neighbourhoods' fund (formally Neighbourhood CIL fund) will also be submitted to Cabinet in September, and we will consider opportunities for further alignment from next financial year.

- 3.8 Further opportunities to link the Supporting Families Programme with this fund will be explored for years two and three.
- 3.9 A review of Carers Services is currently taking place to confirm options for this support going forward and will not specifically be part of this programme.
- 3.10 Preventative services commissioned by Public Health will work closely with the strategic partners and future opportunities for further alignment will be explored.

The prospectus, consultation, and engagement

- 3.11 The prospectus can be found at Appendix 2 and sets out the key ways of working of the services we hope to fund. These services include those which have prevention at the heart of their offer, providing early intervention to ease the burden on more intensive, longer term, and costly measures down the line which are often provided by the council, in particular social care and housing.
- 3.12 A large online engagement event facilitated by Collaborate CIC took place on 27 April 2022, which helped to inform the early thinking around the prospectus. The Collaborative Working Group that was set up following this event further ensured the voice of the voluntary sector was reflected in the prospectus.
- 3.13 A formal consultation on the draft prospectus was launched on 21 July 2022.
- 3.14 The consultation process ended on 16 August 2022 and the prospectus has been updated in line with the feedback received from the voluntary sector over the consultation period.
- 3.15 A research review is also being finalised which considers the national, regional and local picture, including benchmarking with other local and comparator boroughs. The review takes into account the Your Merton findings, plus local impact reports as well as the latest Merton Connected State of the Sector report.

The application form and scoring methodology

- 3.16 The application form for these four funding pots will be standardised across the themes to ensure there is a simple and consistent process for the voluntary sector.
- 3.17 The funding panel will be drawn from the council and ICB representatives and there will also be an independent observer on the panel, drawn from the VCS.
- 3.18 The scoring methodology for the updated Civic Pride Fund: Supporting the Voluntary and Community Sector is set out below. This scoring system ranges from 0 to 5, with 0 being for a response which has not been given or one which is wholly inadequate, whilst a 5 is reserved for responses which are robust, evidenced, and go above and beyond what is asked. Where an application scores a one in any category or has more than one score of two, they will automatically be rejected.
- 3.19 The scoring criteria, weightings and scoring system is set out in the two tables below.

Criteria	Demonstrates	Weighting
Meets Requirements	Alignment with ways of working set out under each theme in the funding prospectus	40%
Value for Money	Evidence based methodology Outcomes, outputs and impact Prevents / delays public sector costs	20%

Track Record	Delivery / impact Fundraising / income generation Partnership and collaborative working/ constructive relationships	20%
Addressing Inequalities	Meets demonstrable needs Helps deliver LBM equalities duties Reaches priority customer group Involves customers in design	20%

Score	Meaning	Description
0	Inadequate	There was no response to the question / there is no supporting evidence demonstrated
1	Poor	There is a significant lack of evidence / it fails to meet the required standard / there are serious shortcomings
2	Weak	There is a lack of evidence / there are some shortcomings
3	Acceptable	The response is robust and there is an acceptable level of evidence / any concerns may be of a relatively minor nature
4	Excellent	A very well-evidenced response / very few if any shortcomings / demonstrates a full understanding of the required standard
5	Exceptional	Outstandingly well-evidenced / goes above and beyond what is required / very few if any shortcomings

- 3.20 Members are asked to review and approve the updated scoring methodology and weighting.
- 3.21 Learning from reports such as the State of the Sector Report and the BAME Impact Report, smaller organisations can struggle to compete with the larger local organisations when applying for funding. To support and develop Merton's small, volunteer and community led organisations, including diversity-led groups, the Civic Pride Fund: Supporting the Voluntary and Community Sector, will allocate funding for smaller groups to build in opportunities and address challenges around infrastructure and capacity.
- 3.22 It is recommended that a small grants programme is incorporated within the wider fund to ensure that a fair and equal system of support is available to Merton's communities, which can be aligned with the local needs of the voluntary and community sector.
- 3.23 Under the theme 'enabling system and place', this programme will provide funds to the Merton Giving Fund on an annual basis, totalling £150k. Merton Giving is a charitable initiative from Merton Connected in partnership with Merton's Chamber of Commerce and Merton Council. The Fund is targeted at voluntary or community organisations with an annual income of less than £1m.
- 3.24 We have also actively been looking at other ways to ensure that we create a level playing field for smaller organisations and that they do not lose out on bidding as part of the wider fund. We are considering ways to support help with bid writing. It should also be noted that under this fund we are encouraging

partnership/collaborative bids. Evidence of partnership and collaborative working/constructive relationships is also included as part of the scoring criteria, as is reach among priority customer groups.

4 ALTERNATIVE OPTIONS

- 4.1 End SPP in March 2023. The current funding climate for local authorities, with reducing budgets and activity also reinforces the continuing need to stimulate and nurture social action. Current services would cease, potentially with current providers being financially unviable and increasing demand for council services. It is likely that we would be in breach of statutory duties and subject to legal challenge (see legal implications below). **Not recommended.**
- 4.2 Keep the format of the Merton Civic Pride Fund: Supporting the Voluntary and Community Sector exactly the same as for the SPP. Due to the extenuating circumstances from the previous two years and the continuing challenges for residents, we need to rethink how we can work to support families and communities in the current landscape to improve residents' physical, social and economic resilience and develop a model, which can support this. **Not recommended.**
- 4.3 Reduce the level of funding in the Merton Civic Pride Fund: Supporting the Voluntary and Community Sector. Due to the significantly increased level of demand and the added value that these local services offer for our residents, this report recommends that this is not an option. **Not recommended.**
- 4.4 We could move away from grant funding and procure the requirements instead, however for the 2019 fund it was decided by Cabinet to retain the grants whilst taking a commissioning approach. CMT also initially agreed this approach in May 2022. Following a 2019 Internal Audit review of the Voluntary Sector, we have reviewed our standard grants processes and updated the council's standard funding documentation, based on the processes followed for the Strategic Partner Programme. Were the programme to be procured as a contract, this would need to go back to Cabinet, and would fundamentally change the nature of the programme. **Not recommended.**

5 CONSULTATION UNDERTAKEN OR PROPOSED

- 5.1 A number of engagement activities have informed the proposals for this fund:
- 5.2 Transforming How We Work with Communities project, and as part of this the listening and engagement work to shape the working better with communities framework.
- 5.3 Your Merton engagement and findings report.
- 5.4 VCS community response monthly steering group.
- 5.5 COVID-19 Impact reports for people with dementia and their carers, people with a learning disability and their carers, people from black and minority ethnic communities and young people.
- 5.6 Merton Connected 'State of the Sector' report.
- 5.7 The outcomes of the Big Conversation for people with a learning disability.
- 5.8 A large online engagement event facilitated by Collaborate CIC took place on the 27 April 2022 and has helped to determine the collaborative approach to shaping the programme. This was attended by over 50 people, with a good range of attendance from both smaller and larger VCS organisations. At the event, initial

ideas were sought on the principles underpinning the work, the process, the vision, and the proposed outcomes of the programme.

- 5.9 Delegates also were invited to put their names forward to join a future Collaborative Working Group. Consultation has taken place through this group, which has met a total of five times. Detailed feedback on the prospectus from this group has been captured in a feedback log.
- 5.10 The formal consultation on the prospectus was open from 21 July to 16 August. This was promoted by Merton Council and organisations across the voluntary sector. A total of five responses were received, with one further response received after the deadline.
- 5.11 Conversations with commissioners within the council and beyond have taken place throughout this process. The early proposals were taken to a commissioner's workshop on 24 May 2022.

6 TIMETABLE

- 6.1 The programme will be advertised to prospective bidders from 3rd October, subject to no 'call in' of the Cabinet decision.
- 6.2 The deadline for funding bids will be on 11th November 2022, after a six-week period.
- 6.3 The selection panel will meet after the closing date for applications and a report will be prepared for the Chief Executive with recommendations on organisations to be funded.
- 6.4 Applicants will be notified of a decision by 31 December 2022.
- 6.5 Funding agreements and monitoring arrangements will be finalised in March 2023 and funding will commence from April.

7 FINANCIAL, RESOURCE AND PROPERTY IMPLICATIONS

- 7.1 Further details of current Strategic Partner Funding are set out at Appendix 1.
- 7.2 The table below details current funding to the Strategic Partner Programme and what current funding is included as part of the budget for the 2023-26 CPF programme:

Current SPP funding element	Current funding 2019-22	Notes for new CPF programme
Information and advice	£529,100 pa	All current funding included under Theme 2 of CPF programme
Infrastructure support	£185,000 pa	All current funding included under Theme 4 of CPF programme
Wellbeing services	£408,734 pa	This amount, plus additional Warm and Well and Fresh Start funding comes to £535,893, which is divided across Theme 2 and 3 of CPF programme
Carers services	£276,219 pa	Not part of CPF and business case will be presented to change carers services to a contract for discharge of statutory assessment duties

Healthwatch	£125,000 pa	All current funding included under Theme 3 of CPF programme This fund could increase slightly, although not confirmed as yet.
Total annual allocation	£1,524,053 pa	
Current total allocation for 3 years (2019-2022)	£4,572,159	

7.3 The following table details the confirmed funding available for four key themes in Civic Pride Fund (CPF): Supporting the Voluntary and Community Sector:

Civic Pride Fund: Supporting the Voluntary and Community Sector	Annual amount	3 years 2023-2026
Services that provide help		
Services that provide emergency assistance to people in crisis	£25,000	£75,000
Services that provide direct help to adults 18+ in need	£55,000	£165,000
Services that grow strengths and capabilities		
Telephone/digital/face to face information, advice, accredited advice, casework and specialist and legal representation	£964,993	£2,894,979 Of this funding, £1,232,679 is allocated specifically for adults in need and the remaining funding for all ages
Active, supportive communities		
Preventative activities for adults 18+ in need	£200,000	£600,000
Healthwatch	£125,000	£375,000
An enabling system and place		
Infrastructure support	£269,100	£807,300
Small grant supportprogramme	£50,000 (plus an additional 10% administration cost)	£150,000 (plus an additional 10% administration cost)
Total (New Allocation)	£1,689,093	£5,067,279

7.4 The budget for the Strategic Partner Programme for 2019-22 was £4,572,159. The grants were extended for an additional year (2022/23) at the same annual amount to allow time for the new Civic Pride Fund to be developed.

7.5 Some current grant money had been transferred from this grant programme for Carers Services, as detailed at 3.9 and there has also been investment in the new programme.

7.6 The tables above demonstrate that the total annual allocation has increased by £165,040 and over three years is £495,120. However, these figures exclude Carers Services to the value of £276,219 pa and £828,657 over three years. Therefore, there has actually been an overall increase in over £1.3m (£441,259 pa) for the three-year programme, which represents a 35 per cent increase on the 2019-22

budget. This includes a £600k additional investment, which has been equally distributed across each programme theme. In addition to the figures set out above, we will also provide funding of £5k pa to cover the 10 per cent administration costs for the small grant support programme via Merton Giving.

- 7.7 We are working to develop additional proposals to make every element of the fund for all ages. However, the adult social care contribution to the fund is specifically for preventative services for adults 18+, as outlined in the above table. It is currently proposed that this will be the subject of a separate bidding round for years two and three of the programme as further work is required to clearly define preventative services that would align with the fund.
- 7.8 We are also looking to align the 'Investing in Neighbourhoods' fund (formally Neighbourhood Community Infrastructure Levy (CIL) with this Fund from the next financial year. This funding will be open for applications very shortly (in the next 2 months). Proposals for this year's Investing in Neighbourhoods fund will also be submitted to Cabinet in September.

8 LEGAL AND STATUTORY IMPLICATIONS

- 8.1 The council has legal duties to provide information and advice, in particular under the Care Act 2014 (Part 1 Section 4) and the Homelessness Reduction Act 2017 (Section 2). Furthermore, the council has the power under the Localism Act 2011 (known as the general power of competence) to do anything an individual may do, unless specifically prohibited. This includes the power to make grants and thus the Localism Act 2011 enables the council to provide the funding to cover the strategic themes that have been identified in the report.
- 8.2 In adopting an outcomes-focused commissioned grants approach, care must be taken to ensure that the outcomes identified are not such that a funding agreement is in reality a contract for the provision of services, which would be subject to the Public Contracts Regulations 2015 and the council's Contract Standing Orders.
- 8.3 Care should also be taken that the giving of a grant does not amount to a subsidy falling under the subsidy control regime. As such the council should ensure that prior to award of grant a declaration is made by the organisation.

9 HUMAN RIGHTS, EQUALITIES AND COMMUNITY COHESION IMPLICATIONS

- 9.1 An initial equality analysis has being undertaken for the redesigned programme and was presented to the Collaborative Working Group on 22nd August and is included at Appendix 4. This analysis will be reviewed and updated at the point that funding is recommended and the updated analysis will be included in the final recommendation report.
- 9.2 To mitigate any potential negative impact, we have undertaken consultation with the sector on the detail contained within the draft prospectus and this consultation was widely publicised. The application period will be six weeks, as in previous rounds. We will promote opportunities for groups to attend individual and larger drop-in advice sessions with officers after the application process opens in early October. This will allow groups the chance to ask clarification questions about the prospectus and application process. We will capture responses to questions in a Q&A document which will be published and shared with the sector.
- 9.3 We have also actively been looking at other ways to support smaller groups. We have introduced a dedicated small grants support programme as part of the wider fund, to support and develop Merton's small, volunteer and community led

organisations, including diversity-led groups. We are also currently identifying opportunities for additional ways to ensure a level playing field for smaller organisations to apply for the wider fund, such as supporting additional help with individual and partnership bid writing.

- 9.4 There will also be an independent observer on the funding panel, drawn from the VCS. In addition, when we assess applications received, we will make judgements on the spread geographically and on the basis of needs, as well as the potential for addressing inequalities in terms of outcomes between the east and west of the borough and between different communities.

10 CRIME AND DISORDER IMPLICATIONS

- 10.1 The proposals in this report do not have a direct crime and disorder impact, however, they will contribute to an inclusive and cohesive society and improve the resilience of vulnerable residents. Overall, this should have a positive impact on the factors that contribute to crime and disorder and reduce the likelihood of vulnerable residents becoming victims of criminal behaviour.

11 RISK MANAGEMENT AND HEALTH AND SAFETY IMPLICATIONS

- 11.1 Two of the council's key risks relate to equalities and to partnership working. The proposals set out in this report will mitigate risks in relation to both of these.

12 APPENDICES – THE FOLLOWING DOCUMENTS ARE TO BE PUBLISHED WITH THIS REPORT AND FORM PART OF THE REPORT

1. Background information - services currently commissioned 2022/23
2. Civic Pride Fund: Supporting the Voluntary and Community Sector draft funding prospectus
3. Consultation response table
4. Equality Assessment

13 BACKGROUND PAPERS

- 13.1 CMT report - Merton Civic Pride Fund: Supporting the Voluntary and Community Sector 2023/26 - commissioning requirements
- 13.2 CMT report - Strategic Partner Programme 2023-2026 12/05/2022
- 13.3 Key Decision Report - Strategic Partner Programme 2019/22 25/02/2019
<https://democracy.merton.gov.uk/ieDecisionDetails.aspx?ID=714>
- 13.4 Key Decision Report - Strategic Partner Programme 2019/22 18/12/2018
<https://democracy.merton.gov.uk/ieDecisionDetails.aspx?ID=687>
- 13.5 Cabinet report – Strategic Partner Programme 2019/22 – commissioning requirements 17/09/2018 -
<https://democracy.merton.gov.uk/ieDecisionDetails.aspx?ID=629>
- 13.6 Cabinet report – Future Funding of the Strategic Partner Programme – 03/07/2017 -
<https://democracy.merton.gov.uk/ieDecisionDetails.aspx?ID=47>

Appendix 1 – Background Information – services currently commissioned 2022/23

Strategic Partner Programme

The Strategic Partner Grants programme currently funds the voluntary sector to provide information, advice and support services in the community which provide low level preventative interventions that strengthen Merton resident’s physical, social, emotional, and economic resilience. The annual cost of the current programme is £1,524,053. The current grants were extended for an additional year (2022/23) at the same annual amount to allow time for the new Civic Pride Fund to be developed.

The current breakdown of funding for Strategic Partners is:

Information and advice provision

Organisation	Summary of Service	Funding amount 2019-22
Citizens Advice Merton & Lambeth	Continue to provide a range of information, advice, casework and specialist support services to people across the borough relating to social welfare law. Additionally provide a Specialist Support Partnership Service and Merton Advice Forum.	£1,065,000
Association for Polish Family	Provide support for the Polish and EE communities in Merton mainly through the provision of information and signposting but also piloted skills development workshops.	£81,000
Commonside Trust	Outreach support provided by South West London Law Centres (SWLLC) to Commonside Trust service users. Provision will include qualified legal advice in the areas of debt and housing. Hosting of specialist adviser from SWLLC three times per month.	£24,300
deafPLUS	Provide a new Merton Deaf Advice Service. Delivery of a two or three day per week Social Welfare Advice Service to Deaf and Hard of Hearing residents of Merton.	£72,000
South West London Law Centres	Provide legal casework and representation services in social welfare law (debt, employment, immigration, asylum, community care, housing and welfare rights) and pro-bono clinics offering legal advice services	£168,000

Springfield Advice and Law Centre	Provide a legal advice service for mental health services users, offering advice and casework representation in debt and welfare benefit matters, including advice outreach sessions.	£177,000
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Voluntary sector infrastructure support

Organisation	Summary of Service	Funding amount 2019-22
Merton Connected (formally Merton Voluntary Service Council)	Continue to provide a one stop shop infrastructure, strategic representation and volunteering support service for the voluntary, community, faith and social enterprise sector and volunteers and potential volunteers in Merton.	£525,000
BAME Voice	Continue to provide support and voice for BAME organisations and communities in Merton. Introduction of a new peer mentoring and buddying scheme.	£30,000

Wellbeing Services

Organisation	Summary of Service	Funding amount 2019-22
Age UK Merton	Living Well service aims to provide support to older adults in Merton to enable them to continue to live independently. The service supports people to improve their independence, connection, health and wellbeing.	£265,350
Merton Mencap	My Life, My Community-provides the resources that people with a learning disability need to live full lives, connected and mainstream community life. Supported by a facilitator and 2 community hub sessions each week.	£145,707
Imagine Independence	Provide range of services and support in Peer Support, Inclusion and Health Living and Vocational support through 3 tiers: specialist, early intervention and universal.	£360,000
Wimbledon Guild	Develop 3 new activities: Ongoing emotional and practical support for people 60+ with complex needs, provision of a Sunday Lunch Service and	£291,000

Organisation	Summary of Service	Funding amount 2019-22
	expansion of emotional support groups for bereavement, older adults and continuity of concern for people with complex mental health needs.	
Merton Vision	Provide support and services to people who are newly visually impaired, to people who have lived with sight loss for some time. Outreach team promote independence to assist reduction in social care dependency.	£164,145

Carers Service

Organisation	Summary of Service	Funding amount 2019-22
Carers Support Merton and Merton Mencap	To continue to provide a one stop shop for unpaid Carers in Merton via the Carers Hub. The Hub will use a model of comprehensive, holistic carers support developed by the Carers Trust.	£828,657

Healthwatch Merton Service

Organisation	Summary of Service	Funding amount 2019-22
Merton Connected (formally Merton Voluntary Service Council)	To continue to provide a Healthwatch Merton, providing an effective voice for local people in Merton, influencing and shaping Health and Social Care services to meet the needs of children, young people and adults.	£375,000

Appendix 2 (on following page) – Draft Funding Prospectus

Appendix 3 – Consultation Response Table

Identity	Theme/Section	Feedback Suggested	Response or action taken
1	Services that provide help	'Provide help' is too vague, could the title for this section be updated to something along the lines of 'Services that provide Emergency Assistance and Direct Help'	This title currently reflects one of the four themes of the Working Better With Communities framework. We have instead included sub-headings which further explains what is included in this theme.
2		There is less information and detail provided for the first theme. It would also be useful to understand how this aligns with the £2m investment	Further detail and explanation for 'services that provide help' has been added to this theme since the original draft was sent out. The £2m investment is separate to this fund and will be discussed with partners once approved.
3		Without leading the applicants - some more specific examples of 'Services that provide help' could be helpful. Plus budget clarity.	Further detail and examples have been included in the 'services that provide help' section. Budgets for each theme will be included in the final prospectus.
4		The draft prospectus speaks of 'consortium' proposals. During the working group we spoke around changing this language to 'Partnership working' or 'Collaboration'.	The draft prospectus has been updated to include 'Collaborative bids', partnership working and all references to consortium proposals have been removed.
5		It was also discussed during the CWG that flexibility being built in from the start and adapting to delivery from new facilities as they arise. Understand the need for flexibility but there is also a need to define provision	The prospectus has been updated to include the need for flexibility and further detail has been provided on types of provision.

6		Central landing page' is discussed in the draft prospectus. It would be good to understand the idea behind this concept a little further.	All references to a 'central landing page' have been removed from the draft prospectus.
7		There is a point in the draft prospectus which talks about an organisation's focus not being to operate from its own premises - this might need to have further thought, many organisations operate services as part of a wider range of funded provisions. There is a balance related to capacity for outreach to be mindful of	The text has now been updated and refers to an organisation's focus not being <i>solely</i> to operate from own premises
8	Services that grow strengths and capabilities	A further point was also raised about organisations which have teams and services that sit across tiers and how to manage this through the application process in terms of bidding	The application process will be open for organisations to bid for more than one theme and will have specific questions related to client group and tiers.
9		It might be helpful to seek examples of where new ways of working/delivering services were developed to respond to the pandemic which show how future models of supporting residents could be further established	This is included in the prospectus
10		It may be clearer to use 'service user' rather than 'client'	We refer to the term customer in the prospectus, as this is Care Act 2014 compliant. However, we acknowledge that some services use the term service user or client.
11		Could the term "Video chat" be used rather than "Skype".	All references have been updated to refer to 'video chat e.g. Zoom/Skype'

Appendix 4

Draft Equality Analysis



What are the proposals being assessed?	The launch of the council’s redesigned Civic Pride Fund: Supporting the Voluntary and Community Sector 2023-26, in October 2022.
Which Department/ Division has the responsibility for this?	Delivery leads: Corporate Services, Customers, Policy and Improvement Division and Community and Housing, Adult Social Care Division

Stage 1: Overview

Name and job title of lead officer	John Dimmer, Interim Head of Corporate Policy and Improvement
1. What are the aims, objectives and desired outcomes of your proposal? (Also explain proposals e.g. reduction/removal of service, deletion of posts, changing criteria etc)	<p>The council will be launching the redesigned Civic Pride Fund: Supporting the Voluntary and Community Sector 2023-26 (formerly Strategic Partner Programme) in October 2022, with new voluntary and community sector strategic partners funded from April 2023. We are aligning a range of information, advice and preventative support services into an expanded ‘Supporting the Voluntary and Community Sector’ programme which sits under the umbrella of the Civic Pride Fund, with the aim of ensuring the most targeted use of the council’s limited resources and to make it easier for organisations to seek and apply for funding. The Programme now comprises four separate elements: Services that provide help; Services that grow strengths and capabilities; Active, supportive communities; An enabling system and place. These themes align with Merton Council’s new ‘Working Better With Communities’ framework.</p> <p>The proposed aims of the new 2023-26 Civic Pride Fund: Supporting the Voluntary and Community Sector are to: Invest in and support Merton’s local voluntary and community infrastructure; Nurture a strong sense of community and reduce inequalities; Bring together preventative services that provide information, advice and support in the community to strengthen Merton resident’s physical, social, emotional, and economic resilience.</p>
2. How does this contribute to the council’s corporate priorities?	Civic Pride is one of the new administration’s key priorities for Merton. It has been proposed that all core funding that goes to voluntary sector and the local area should come under the overarching umbrella of a Merton ‘Civic Pride Fund’ (CPF). This reflects our commitment to putting Civic Pride at the heart of our borough.

	<p>The proposed programme themes align with Merton Council's new 'Working Better With Communities' framework which was developed and agreed by the council's Corporate Management Team as part of the cross-cutting corporate Transforming How We Work with Communities Project. The themes are specifically focused around areas where people may find help and support in Merton.</p>
<p>3. Who will be affected by this proposal? For example who are the external/internal customers, communities, partners, stakeholders, the workforce etc.</p>	<p>Key identified customers: existing and potential voluntary and community sector service providers; existing and potential service users; other internal/external commissioners.</p> <p>Who will the proposal benefit: by aligning funding programmes it is intended that we will simplify the application process for the voluntary sector, prevent duplication, and that funding will ultimately have a greater impact. It has been identified that the goal of provision under this strand of the Civic Pride Fund should be to develop clients' resilience and enable them to see an improvement in their circumstances.</p> <p>How the proposal will benefit the council: The redesigned programme aims to ensure more targeted use of the council's limited resources. In the current financial climate, we will be looking to support services that prevent, reduce or delay the need for more expensive interventions.</p>
<p>4. Is the responsibility shared with another department, authority or organisation? If so, who are the partners and who has overall responsibility?</p>	<p>Current responsibility for co-ordinating the engagement work, development of the funding prospectus and administration of the front end of the funding process sits within Corporate Services and Communities and Housing. Responsibility for the different themes of the programme also currently fall across Corporate Services and Communities and Housing. However, it should be noted that we are working to develop additional proposals relating to supporting children and families with the ambition to make every element of the fund all ages. Following discussion with CSF senior managers, it is envisaged that this expansion will be the subject of a separate bidding round for years two and three of the programme as further work is required to clearly define preventative services that would align with the fund.</p>

Stage 2: Collecting evidence/ data

5. What evidence have you considered as part of this assessment?

Provide details of the information you have reviewed to determine the impact your proposal would have on the protected characteristics (equality groups).

Evidence gathered:

Listening and engagement work was undertaken as part of the Transforming How We Work With Communities project to help shape the working better with communities framework, which in turn has helped to shape the redesigned funding programme.

The recommissioning process was launched with large online engagement event facilitated by Collaborate CIC on 27 April 2022, which helped to inform the early thinking around the prospectus. This was attended by approximately 50 voluntary and public sector representatives.

A task and finish 'Collaborative Working Group' drawn from attendees at the April engagement event was set up, including representatives from across the council, ICB, and voluntary sector. The working group met five times and the meeting was initially chaired between Keith Burns, Interim Assistant Director of Commissioning, Community & Housing and then following agreement by the working group to find an independent chair, the chairing role was taken over by Simon Breeze, Chief Executive of Sutton Community Action. Outputs from the initial workshop helped to inform discussions in this group. Meetings were themed around different elements and feedback from this group helped to shape the draft funding prospectus.

Engagement has also happened via other forums, such as the Community Response Steering Group.

To support this work, the council also undertook a research review, which looked at the national, regional and local picture. Locally, this included the Your Merton engagement and findings report; Covid-19 Impact reports for people with dementia and their carers, people with a learning disability and their carers, people from black and minority ethnic communities and young people; Merton Connected 'State of the Sector' report 2021; outcomes of the Big Conversation for people with a learning disability. Benchmarking with other neighbouring and comparator boroughs was also undertaken as part of this review.

The formal consultation on the draft funding prospectus opened on 21 July and ended on 16 August. A total of five responses were received.

Conversations with commissioners within the council and beyond have taken place throughout the process. The early proposals were taken to a commissioner's workshop on 24 May 2022.

Impact of evidence on proposals:

Drawing on the findings from the consultation and research to date, the draft prospectus has been designed to ensure that the services which are commissioned will be equally accessible to all members of the community and can be targeted at those people and areas with the highest levels of need.

The Working Better with Communities Framework, which was informed by a range of listening and engagement, has provided a structure for this funding programme, which is specifically focused around areas where people may find help and support in Merton. Addressing inequalities was prioritised as an essential part of the approach developed and has been included as part of the 'ways of working' identified under the four funding themes.

The Covid impact reports produced have highlighted existing inequalities, both in terms of the direct impact of infection but also the indirect economic and social impacts. In Merton, there is significant correlation between socio-economic inequalities and geography, with the east of the

borough being more deprived than the more affluent west. Tackling inequalities, especially health inequalities and 'bridging the gap' between the east and west of Merton, is at the heart of the prevention agenda and needs to be taken across the whole life course so that all Merton residents can start well, live well and age well. The proposed level of investment in the programme aims to extend it across all residents no matter what someone's age. We are working to develop additional proposals relating to supporting children and families with the ambition to make every element of the fund all ages.

We are also aware the VCS are working in partnership to tackle the increasing pressures of the cost of living on Merton residents. In response to this, we have ensured that support for the community infrastructure that provides direct help and emergency assistance has been built into the three-year programme.

The detail of the prospectus has reflected discussions in the Collaborative Working Group. Feedback from working group members has also been captured in a feedback log and the draft prospectus has been updated on this basis, where appropriate.

Learning from reports including the State of the Sector Report and the BAME Impact Report has indicated that smaller organisations can struggle to compete with the larger local organisations when applying for funding. To support and develop Merton's small, volunteer and community led organisations, including diversity-led groups, the reconfigured fund includes a dedicated programme for smaller groups to build in opportunities and address challenges around infrastructure and capacity. It has been recommended that a small grant support programme is incorporated within the wider fund to ensure that a fair and equal system of support is available to Merton's communities, which can be aligned with the local needs of the voluntary and community sector.

The prospectus will also be updated in line with the feedback received from the voluntary sector over the consultation period.

No gaps in data have been identified, but it is acknowledged that there is potentially a negative impact for voluntary and community sector organisations who may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be. These services may tend to be smaller and are likely to support individuals with a range of protected characteristics.

Stage 3: Assessing impact and analysis

6. From the evidence you have considered, what areas of concern have you identified regarding the potential negative and positive impact on one or more protected characteristics (equality groups)?

Protected characteristic (equality group)	Tick which applies		Tick which applies		Reason Briefly explain what positive or negative impact has been identified
	Positive impact		Potential negative impact		
	Yes	No	Yes	No	
Age	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Disability	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Gender Reassignment	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Marriage and Civil Partnership	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Pregnancy and Maternity	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Race	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.

Religion/ belief	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Sex (Gender)	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Sexual orientation	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.
Socio-economic status	✓		✓		Generally a positive impact identified; however, there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.

7. If you have identified a negative impact, how do you plan to mitigate it?

The key benefit of the commissioning approach used is that our requirements have been co-produced with the voluntary sector and detailed thought has gone in to designing the key outcomes we want to achieve for Merton residents.

A potential negative impact is therefore that some voluntary and community sector organisations may not be able to meet the more detailed and specific criteria we will use to decide who our Strategic Partners will be. To mitigate this, we have undertaken consultation with the sector on the detail contained within the draft prospectus and have ensured that this consultation was widely publicised.

We also intend to offer individual and group advice sessions for the VCS to attend in October shortly after application process is launched in October. The application period will be six weeks, as in previous rounds.

We have also actively been looking at other ways to support smaller groups. We have introduced a dedicated small grants support programme as part of the wider fund, to support and develop Merton's small, volunteer and community led organisations, including diversity-led groups. We are also currently identifying opportunities for additional ways to ensure a level playing field for smaller organisations to apply for the wider fund, such as supporting additional help with individual and partnership bid writing. It should also be noted that under this fund we are also

encouraging partnership/collaborative bids. Evidence of partnership and collaborative working/ constructive relationships is also included as part of the scoring criteria, as is reach among priority client groups.

There will also be an independent observer on the funding panel, drawn from the VCS. In addition, as stated in the draft prospectus, when we assess applications received, we will make judgements on the spread geographically and on the basis of needs, as well as the potential for addressing inequalities in terms of outcomes between the east and west of the borough.

Stage 4: Conclusion of the Equality Analysis

8. Which of the following statements best describe the outcome of the EA (Tick one box only)

Please refer to the guidance for carrying out Equality Impact Assessments is available on the intranet for further information about these outcomes and what they mean for your proposal

- Outcome 1** – The EA has not identified any potential for discrimination or negative impact and all opportunities to promote equality are being addressed.
- Outcome 2** – The EA has identified adjustments to remove negative impact or to better promote equality.
- Outcome 3** – The EA has identified some potential for negative impact or some missed opportunities to promote equality and it may not be possible to mitigate this fully.
- Outcome 4** – The EA shows actual or potential unlawful discrimination. Stop and rethink your proposals.

Stage 5: Improvement Action Pan

9. Equality Analysis Improvement Action Plan template – Making adjustments for negative impact

This action plan should be completed after the analysis and should outline action(s) to be taken to mitigate the potential negative impact identified (expanding on information provided in Section 7 above).

Negative impact/ gap in information identified in the Equality Analysis	Action required to mitigate	How will you know this is achieved? e.g. performance measure/ target)	By when	Existing or additional resources?	Lead Officer	Action added to divisional/ team plan?
Potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.	Undertake consultation with the sector on the detail contained in the draft prospectus. Ensure that this consultation is widely publicised.	A range of organisations submit applications for funding	Nov 2022	Existing	John Dimmer	Not required
Potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.	One to one and group advice sessions to answer queries from voluntary and community sector organisations on the draft funding prospectus	A range of organisations submit applications for funding	Oct 2022	Existing	John Dimmer	Not required
Potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be.	Specific funding available for smaller VCS organisations as part of the wider funding. Further consider ways to ensure a level playing field for smaller organisations, such as supporting help with bid writing.	In addition to bidding to the small grant support programme, a range of smaller organisations submit single or partnership applications for funding to the wider areas of the programme.	Nov 2022	Existing	John Dimmer	Not required

Note that the full impact of the decision may only be known after the proposals have been implemented; therefore it is important the effective monitoring is in place to assess the impact.

Stage 6: Reporting outcomes

10. Summary of the equality analysis

This section can also be used in your decision making reports (CMT/Cabinet/etc) but you must also attach the assessment to the report, or provide a hyperlink

This Equality Analysis has resulted in an Outcome 2 Assessment

1) Key impacts:

2) Positive: drawing on the findings from the consultation and research to date, the draft prospectus has been designed to ensure that the services which are commissioned will be equally accessible to all members of the community, and can be targeted at those people and areas with the highest levels of need.

Negative: there is potentially a negative impact for voluntary and community sector organisations that may not be able to meet the more detailed criteria we will use to decide who our Strategic Partners will be. These services are likely to be smaller organisations that support individuals with a range of protected characteristics. No particular equality groups have been identified that would be affected more than others.

To mitigate the negative impact, we are undertaking consultation with the sector on the detail contained within the draft prospectus and have ensured that this consultation is widely publicised. We will run a funding advice session for the VCS to attend in September.

In addition to introducing a dedicated small grants support programme, we have also actively been looking at other ways to ensure that we create a level playing field for smaller organisations and that they do not lose out on bidding as part of the wider fund. We are considering ways to support help with bid writing and will also be encouraging partnership/collaborative bids.

The application period will be six weeks, as in previous rounds. In addition, when we assess applications received, we will make judgements on the spread geographically and on the basis of needs, as well as the potential for addressing inequalities in terms of outcomes between the east and west of the borough.

Stage 7: Sign off by Director/ Head of Service

Assessment completed by	Amanda Roberts, Policy Strategy and Partnerships Officer.	Signature: Amanda Roberts	Date: 17/08/2022
Improvement action plan signed off by Director/ Head of Service	John Dimmer, Interim Head of Corporate Policy and Improvement	Signature:	Date: