



SOMERSET VOLUNTARY YOUTH SECTOR Funding Review 2004

Final Report

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FINAL REPORT

Introduction

The Regional Youth Work Adviser was invited by Somerset County Youth Service to provide an external evaluation of the new grant application and monitoring process for voluntary youth organisations, introduced from April 2004. The evaluation was carried out during August and September 2004, and has included a review of background documents and interviews with key players in the process.

Aims

- To evaluate the effectiveness of the current funding process in enabling young people in Somerset to benefit from good quality youth work provided through the voluntary sector.
- To assess the extent to which the priorities of the key partners (Connexions, Somerset Youth Partnership and Somerset County Youth Service) are met through the current funding process.
- To make recommendations for continuous improvement of the process for funding voluntary sector youth work in Somerset.

Background

The current process for allocating funding to voluntary youth organisations replaces a long standing process by which SCYS gave grant aid to several youth organisations providing services across the county, and a more recent process of contracting between Connexions Somerset and voluntary organisations. The pooling of these two budgets has produced a combined pot of around £140,000. In addition to this, SCYS retains a separate arrangement with Somerset Rural Youth Project and Somerset Federation of Young Farmers Clubs.

The revised funding process is an outcome of positive partnership work between SCYS, Connexions and SYP. Without this background of mutual understanding and respect the decision to pool budgets and devolve decision making responsibility to a panel convened by SYP would not have been possible. Somerset is the first area in the South West region to pool the voluntary sector budgets from the Youth Service and Connexions. Somerset County Council supports the initiative, and sees it as an element of the implementation of an effective Compact with the voluntary sector. The arrangement forms part of the Partnership Agreement between SCYS and SYP for 2004/5.

The Process

Connexions and SCYS each defined their priorities for provision through the voluntary sector. These were combined and explained to applicant organisations through the Application Pack. The priorities for 2004/5 were:

- To provide young people with a wider/innovative youth work experience, which is responsive to the aspirations of those young people. Priority should be given to areas where there is little existing provision.

- To show clear evidence of increased participation, particularly from minority groups.
- To increase the short and long term personal development and accredited learning opportunities for young people, particularly but not exclusively in rural areas. Opportunities should promote progression into ongoing learning/training and you may register to put young people forward for the Somerset Youth Award.
- To support the partnership's shared opportunities for training.
- To support volunteers/staff in voluntary youth groups particularly in rural areas.
- To increase the range of volunteering opportunities available to young people, especially where they can be accredited.
- To enhance the provision of Advice and Information Services for young people particularly where these are not being provided by other agencies. Evidence of uptake and quality of service will be required during monitoring.

The Co-ordinator & Network Development Officer at SYP has had overall responsibility for the day-to-day management of the process. Application packs and guidelines were designed and circulated to all SYP members in December 2003, and returned to SYP in January 2004. A Funding Advisory Panel met in February 2004, to make decisions about grant allocations. Applicants were informed of the outcome in February, and funding agreements between the partnership and the organisation were issued in March, with funding available from April 2004. A mid-way monitoring visit by members of the Funding Advisory Panel and young people to each successful organisation is planned for September 2004 (In practice it is likely that several of these will take place in October). Reports from the monitoring visits will inform decision making for 2005/6.

Funding Advisory Panel role

The Funding Advisory Panel consisted of representatives from key stakeholders, including young people. In the event, not all those nominated were able to attend either the induction/training meeting or the Panel meeting itself, due to other commitments. Active members of the Panel included:

- David Smith (Somerset Rural Community Council: Independent Chair)
- Elisabeth Piecha (County Youth Service Manager: non-voting member)
- Heather Strawbridge (Connexions Partnership)
- Rhiannon Prys-Owen (Chair of SYP)
- Representatives of SYP members
- Three young people, drawn from youth groups in Somerset.

Elected members from Somerset County Council were invited to be part of the Panel but were unable to attend because of other commitments: however, Councillor Alan Paul has expressed his interest in getting involved in the monitoring visits.

Preparation for the assessment of applications was very thorough. Young people representatives attended the main induction day, as well as a separate meeting with the Chair of SYP in which they could air any concerns about the applications and ask questions they might find difficult in the larger group. The induction/training half day explained the process, including the use of the scoring sheet for each application. All members of the Panel read and scored each application. The Scrutiny meeting enabled members to ask further questions about the applicant organisations, and seek clarification on particular issues, from the County Youth Service Manager and the Chair of Somerset Connexions Partnership, prior to making decisions. This year, the Co-ordinator & Network Development Officer from SYP was not at the Scrutiny meeting, as her role involved supporting and encouraging organisations to submit applications. However, in future, it may be useful for her to attend in a non-voting capacity, as her more detailed knowledge of some of the organisations may help the deliberations.

In all, 14 applications were received, of which 11 were successful. Applicants were informed of the decision by the Chair of the Funding Advisory Panel, and advised of their right to appeal.

Appeals Process

All those interviewed acknowledged that the practicalities of dealing with an appeal had not been fully addressed. When an organisation appealed, there was unnecessary and inappropriate delay due to the difficulty of calling an appeals panel meeting. The issue was ultimately resolved, but in future it is recognised that a clear timescale for appeals should be set at the start of the process, and any necessary meetings should be entered into diaries before decisions are announced.

Funding agreements

Each successful applicant organisation is required to complete a funding agreement form with SYP. This year the SYP Co-ordinator & Network Development Officer has visited each organisation and met with key individuals to ensure that there is mutual understanding of the requirements of the funding. The funding agreement identifies the priorities that the organisation intends to work on, and nominates a young person to be involved in the monitoring visits to other organisations. SYP was able to release funding to organisations on 1 April. The speed and efficiency of this process was much appreciated by the recipients.

Monitoring Visits

Monitoring visits by members of the Funding Advisory panel or their nominees and young people from successful organisations were planned for September 2004. The purpose of the visits is to report on how the organisation demonstrates that it meets the priorities it identified in their funding agreement. Following the visit a short report will be submitted to SYP, and these will be taken into account in dealing with future applications. SYP regards the involvement of recipient organisations in this peer assessment process as an essential aspect of developing peer support and challenge to help drive up the quality of youth work provided through the voluntary sector in Somerset.

The monitoring visit observed during the evaluation period certainly provided evidence of positive challenge to the organisation concerned. The team of three, two of whom were young people, one of whom had been a member of the Funding Advisory Panel visited the project, observed work in progress, spoke to young people attending and interviewed the Project Manager. Appropriate and searching questions were asked and answered, particularly around aspects of the project which had been identified as priorities during the funding period. On this occasion the monitoring team wrote their report on the project immediately after the visit, while their impressions of the project were still fresh. The process was most impressive, for its focus on issues identified in the Funding Agreement, and for the very positive and active involvement of young people.

Understandably there has been some slippage in the timescale for monitoring visits. The process of getting Funding Advisory Panel members together with young people from the organisations, with whom they have not previously had contact, and then arranging a convenient time to visit the organisation has had its problems, and the organisation of the process by the SYP Co-ordinator and Network Development Officer has been more time consuming than anticipated. However, this is an important and valuable part of the process that needs to be supported and encouraged.

Tensions in the process

There are inevitable tensions in the transition from an established historic tradition to a more open and accessible process. In fact, there seem to have been relatively few tensions experienced by applicants on this occasion, possibly because the 'pot' was bigger as a result of the combination of SCC and Connexions funding, so the process could accommodate most of the organisations that had received funding from SCC in previous years, and some new recipients.

In at least one organisation, however, tensions have emerged around the requirement to focus on priorities. During the scrutiny process, the value and quality of their application was questioned, and this needed to be set against the importance of retaining capacity to deliver youth work in a priority geographical area. In this instance, a compromise has been reached, and the monitoring process will be crucial in determining future decisions about funding. SYP has a key role to play in ensuring that its members understand that funding comes with its own requirements, and will not automatically be repeated year on year.

Impact on voluntary sector capacity building

Three of the organisations that received funding this year had not accessed this funding stream before, either through the Youth Service or Connexions. This has brought new capacity to the sector, and has encouraged a number of projects focussing on particular curriculum areas and specific groups of disadvantaged young people. The role played by SYP in co-ordinating and managing the whole funding process has strengthened SYP's role in the voluntary sector, as a representative of the youth sector, and as a source of support and advice to help organisations to develop and improve the quality of the work they undertake with young people. The use of peer assessment as the mechanism for decision making gives voluntary organisations considerably more control of their sector, and is likely to improve quality across the sector as expertise is shared through monitoring visits and future assessment processes.

There is, however, an underlying concern about the long term capacity of SYP to co-ordinate this process and fulfil its representational role on behalf of the sector. All those interviewed recognised that this has been an enormously time-consuming process for the SYP Co-ordinator & Network Development Officer and others, many of whom are undertaking their share on a voluntary basis, on top of other voluntary commitments. The co-ordination of the grant allocation process is incorporated into the Partnership Agreement between SYP and the County Youth Service, as part of a wider brief to support and develop voluntary youth work in the county.

SYP currently has only one paid part-time Co-ordinator, and is lucky to have a very active and able Chair who is able to do some work on behalf of SYP through her current job. SYP has been financially supported through Transforming Youth Work Development Fund, but this is likely to end in March 2005. The funding for the Co-ordinator post is not secure, and a change of Chair could mean a considerable loss of 'person-power' to the organisation. If the current, very positive developments are to be sustained, partners and stakeholders in SYP need to look seriously at increasing the staffing, ideally by the addition of a senior post to complement the Co-ordinator & Network Development Officer's role.

Involvement of Young People

Considerable effort has been put into involving young people in each stage of this process, and it has been a useful and successful venture so far. Young people were able to be active participants in the scrutiny process, and a wider range of young people will be involved in the monitoring process. This helps to build up expertise and experience within the organisations, and could then be linked into other participation initiatives in the County (eg Youth Bank). Considerable time has been invested in making this work, however, which adds to the overall cost of the process, and this should be taken into account in planning for sustainability.

SWOT ANALYSIS OF FUNDING PROCESS

Strengths	Weaknesses
<ul style="list-style-type: none"> • Making the process more transparent and accessible • Voluntary sector feel ownership of the process • Thorough peer assessment, scrutiny and evaluation • Building trust within the voluntary sector • Young people's involvement in decision making • Strong support from all partners • Makes support available to smaller voluntary organisations • Improvement in SYP's financial management capacity • Speedy process of getting money to organisations • Maximises resources and stops double funding • Helps prepare organisations for future commissioning processes • Reflects the principles of the VCS Compact • Sensitive handling of organisations concerns and interest 	<ul style="list-style-type: none"> • Lack of a schedule for appeals process • Need for more clarity about the role of the Independent Chair once the Scrutiny is over • Limited involvement from elected members • Very time consuming for SYP: need for additional staff time to sustain and develop the process • Follow-up work with organisations where problems emerged needs to be improved • Timescale for monitoring visits appears to have slipped, and has required additional co-ordination from SYP
Opportunities	Threats
<ul style="list-style-type: none"> • Bring in other funding to increase the pot • Link the process with moves to commissioning services for Children and Young People • Encourage more 'cluster bids' from groups of organisations • Strengthen SYP's role in helping member organisations to deliver/improve • Establish 2-3 year funding 	<ul style="list-style-type: none"> • Long term capacity of SYP to sustain the process • Sustainability of the monitoring process • Reduction in funding from SCC and/or Connexions

Strengths	Weaknesses
programme <ul style="list-style-type: none"> • Give greater clarity about minimum and maximum amounts available • Introduce categories for direct delivery and umbrella organisations 	

How does the process enable young people in Somerset to benefit from good quality youth work provided through the voluntary sector?

The pooling of the SCC and Connexions 'pots' has made more money available to a wider selection of organisations in the County. The identification of a broad and inclusive set of shared priorities has enabled organisations to consider their existing work in the light of the priorities, and make applications that will enhance and improve the quality of existing work. The monitoring process will play a key role in determining the quality of the work provided, and will need to be sufficiently rigorous in setting quality standards. It may be appropriate to develop a more structured form of feedback for monitoring visits, and consider a briefing session for young people and Panel Members prior to undertaking monitoring visits. (This had taken place for the visit observed during the evaluation, and could be extended to all those involved in the monitoring process).

To what extent are the priorities of the key partners met through the funding process?

The priorities are clearly laid out and sent to applicants with their application pack. Applicants identify the ways in which they meet the priorities in their application, and identify which of the priorities they will focus on in their funding agreement. An analysis of the funding agreements with successful organisations shows that all the priority areas are covered to some extent, as shown below:

- To provide young people with a wider/innovative youth work experience, which is responsive to the aspirations of those young people. Priority should be given to areas where there is little existing provision. **9 responses**
- To show clear evidence of increased participation particularly from minority groups. **4 responses**
- To increase the short and long term personal development and accredited learning opportunities for young people, particularly but not exclusively in rural areas. Opportunities should promote progression into ongoing learning/training and you may register to put young people forward for the Somerset Youth Award. **8 responses**
- To support the partnership's shared opportunities for training. **3 responses**
- To support volunteers/staff in voluntary youth groups particularly in rural areas. **7 responses**
- To increase the range of volunteering opportunities available to young people, especially where they can be accredited. **6 responses**
- To enhance the provision of Advice and Information Services for young people particularly where these are not being provided by other agencies. Evidence of uptake and quality of service will be required during monitoring. **5 responses**

This suggests good coverage of the priorities at present, and the monitoring process will provide evidence of the extent to which they are being met in practice. The Partnership may wish to consider giving more emphasis to work with minority groups in future years, as apart from training opportunities for staff, this appears to be the priority least well supported.

Recommendations for continuous improvement

The process is viewed very positively by all those concerned. It has clearly helped to raise the profile of SYP, both with partners and within the voluntary youth sector. It has increased voluntary sector understanding of the issues involved in funding applications alongside their involvement in the decision making process. The extent of involvement of young people in the process is to be commended, as is the commitment to the process by both Somerset County Youth Service and Connexions. The report has identified some issues that would merit attention, and the recommendations below relate to these issues.

- 1. Long term capacity of SYP to sustain and develop the process.** SYP has made an excellent start on undertaking this project, and has proved it can gain the trust of those involved, and play an active role in developing and improving quality amongst its member organisations. However, the process is very time consuming, and requires considerable investment. ***There is a need for investment in additional staff in SYP, ideally at a senior level to complement the role of the Co-ordinator & Network Development Officer and enable SYP to gain and sustain the strategic height needed to undertake its representational role on behalf of the voluntary youth sector.***
- 2. Slippage in the monitoring process.** The monitoring visit is a very important element of the process, and recipient organisations are required to participate in the process. Difficulties in organising monitoring visits have been acknowledged by SYP, and additional time has been devoted to ensure that visits take place. ***It is recommended that a briefing meeting for all those involved in the monitoring process is held in early September to allow members of groups to meet each other, clarify expectations, and ensure understanding of the process and the timescale.***
- 3. Appeals process.** Following problems this year, it is recommended that ***an Appeals Meeting is scheduled in shortly after the allocations are announced, and applicants are informed in advance of the timing.***
- 4. Benefits of longer term funding to voluntary organisations.** The partners are aware that the annual funding cycle makes long term planning difficult, and have expressed a desire to move towards 2-3 year funding programmes. This would also cut down on the work required from SYP to manage the process. ***Opportunities to move towards longer term funding should be explored.***
- 5. Role of the independent Chair.** As noted earlier, the Independent Chair provided credibility for the Funding Advisory Panel, and assured applicants that the process was objective. There seems to have been some lack of clarity as to the extent of his duties in the follow-up period, in terms of informing applicants, dealing with appeals and participating in the monitoring process: a considerable workload for a voluntary contribution. It may be that in future years, credibility will be established, and it may not be necessary to appoint an Independent Chair. If the appointment continues, however, it is recommended that ***the Chair's duties are clarified beforehand, and are limited to chairing the Funding Advisory panel and the Appeals Panel.***

6. **Involvement of elected members.** It was unfortunate that due to diary conflicts, elected members of SCC were not able to take part in the Funding Advisory Panel this year. ***It would help to connect the process to SCC's decision making systems if an elected member is involved as a member of the Funding Advisory Panel in future.***
7. **Costs of the funding process.** This year the costs of managing and co-ordinating the process have been largely hidden, as they have been picked up as part of SYP's Partnership Agreement with SCYS. ***It would be useful to identify the actual costs in staff time of managing the process, including facilitating young people's involvement within it, and ensure that these costs are taken into account in future funding for SYP itself.***

Conclusion

The revised process for allocating funding to voluntary youth organisations from Connexions and SCC are widely welcomed in the field, and have done much to improve the relationships between statutory and voluntary youth organisations. The identification of clear and achievable priorities by Connexions and SCYS provides a helpful basis for determining funding allocations, and the involvement of young people and voluntary organisations themselves in the process does much to improve understanding of the priorities and assists the development of good quality youth work. The process could benefit from minor amendments as noted in the recommendations section above, and is in general terms extremely beneficial to young people in Somerset.

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