

Three Year Discretionary Grant Aid 2010–13 Initial Appraisal Sheet for Outline Bids

Name of Organisation

Nature of Organisation

Criteria Number

Area of benefit

Service Specialism

Finance & Legal

Account Name

Number of signatories

Legal Status

Funding Relationships

Size of Organisation Any possible changes to size
Please describe possible changes to size:

| | | |
|--------------------------|---|---|
| Audited Income 2007-08 | £ | |
| Estimated Income 2008-09 | | £ |

| | | |
|--------------------------|--|---|
| Current Grant 2007-10 pa | | £ |
| Annual Grant 2008-09 pa | | £ |

Any other identified council income

| | | |
|------------------------------|--|---|
| Funding Requested pa 2010-13 | | £ |
|------------------------------|--|---|

| | | |
|-----------------------------------|---|---|
| Absolute increase pa 2010-13 | £ | |
| Increase as % of current grant pa | | % |

Requested grant as % of forecast income 2010-11%

Notes

(including outstanding documentation, reserves position, eligibility issues & criteria fit etc):

Appraisal Template

Three Year Discretionary Grant Aid

Medium and Larger Organisations 2010-13

| Organisation Name | Project Name (if applicable) | |
|---|-------------------------------------|----------------------|
| Priority | Rating | Notes/Reasons |
| i) The organisation provides added value to City Council corporate priorities and directorate development plans. | | |
| ii) The grant fits with/balances other sources of funding available through council supported initiatives e.g. Community Development Commissioning, CYPT, Sussex Learning and Skills Council etc | | |
| iii) The organisation provides a city-wide service where no local delivery exists. (iii) and (iv) are linked to establish whether there are competing services working at either city-wide or local level and to try and establish which you feel is most appropriate or a priority. | | |

| | | | |
|------|---|---------------|------------------------------------|
| iv) | The organisation provides local delivery where this is more appropriate. | | |
| v) | This activity would be more appropriately funded by either a contract from elsewhere within the council or from another statutory provider eg. Primary Care Trust (PCT) | | |
| | Priority | Rating | Notes/Reasons for decisions |
| vi) | The organisation supports equalities issues. | | |
| vii) | The organisation evidences it is meeting needs and/or has evidenced unmet need for its service. | | |
| | The organisation has evidenced its capacity to deliver ie. staffing/funding/structures | | |

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|-------------------------|--|
| Ranking position | |
| Reasons | |

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|---|--|
| Name & Title of Appraisal Officers | |
| Signature of Appraisal Officers | |
| Date | |

**Three Year Strategic Grants 2010-13
Full Bid Technical Appraisal & Supporting Narrative**

Name of Organisation:

Project:

A) Delivery

| Supporting Document: Risk Management Strategy <i>(highlight as applicable)</i> | | | | |
|---|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| Comments: eg. is risk identified and addressed through maintenance of robust monitoring / evaluation procedures and quality control framework? | | | | |
| | | | | |

B) Human Resources

| Supporting Document: Staffing Structure <i>(highlight as applicable)</i> | | | | |
|--|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| Comments: eg. how are paid staff are managed & volunteers developed, are specific skills / experience brought to the organisation by trustees / management committee? | | | | |
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C) Financial Management

| Supporting Document: Written Financial Controls (<i>highlight as applicable</i>) | | | | |
|---|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| <i>Comments: eg. do controls underpin daily operations in terms of monitoring cash flow, payment of expenses, VAT registration, account signatory status etc?</i> | | | | |
| | | | | |

D) Accounts

| Supporting Document: Income & Expenditure Forecast 2009-10 (<i>highlight as applicable</i>) | | | | |
|---|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| <i>Comments : eg. how does this relate to accounts information submitted at Outline Bid, are there any significant changes to that information?</i> | | | | |
| | | | | |

E) Equal Opportunities

| Supporting Document: Equal Opportunities Policy (<i>highlight as applicable</i>) | | | | |
|---|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| <i>Comments: eg. is service planning and delivery informed, specifically in relation to the city's Reducing Inequalities Review and BHCC Equalities & Inclusion Policy 2008-2011?</i> | | | | |

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F) Business Planning

| Supporting Document: Business Plan / Fundraising Strategy 2010-13 (<i>highlight as applicable</i>) | | | | |
|--|------------|-----|-----------|-------|
| Fully Met | Met (high) | Met | Met (low) | Unmet |
| Comments: eg. does work with statutory, private & third sector partners shape the strategic nature of services? | | | | |
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| Appraisal Officers: |
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