

Meeting Trustee Board meeting

Date 13 October 2022

Title Young Carer Grants Adjudication

Agenda item 7

1.0 Purpose of paper

To outline the process for selecting which organisations will be awarded a Young Carer grant.

2.0 Budget

The budget for the current round of Young Carer Grants is £500,000.

3.0 Director Visits

Half of the funding requests were assessed via a Zoom call and the other half face to face. This was due to a variety of factors including travel issues, an unexpected bank holiday and availability. Assessments took place between July and October following the process detailed in the policy for Grant Adjudication. A report was written following each visit including an assessment of:

- Risk - based on whether there are any risks identified that might impact their ability to successfully deliver their project and affect the grant award.
- Difference the grant will make to the organisation and young carers.
- Priority – taking account of the above assessments as well as the type of activities planned and how well the anticipated outcomes meet the Young Carer grant criteria and strategy aims.

4.0 Documentation

The assessment visit report incorporates the supplementary information provided by the applicant organisation once they have been shortlisted for a visit. This information includes financial information (including the organisation budget), strategic/organisational plans, relevant policies, organisation charts and a completed reporting form that identifies key activities to be undertaken in the first year of the grant.

These documents and other documents submitted for each shortlisted application can all be viewed on Salesforce in conjunction with the assessment visit report. Viewing the strategic plans can also provide a more detailed insight into the organisations and their future plans. However, the level of detail in the report is

such as to enable adjudication to take place without the need to review these documents.

The purpose of the report template is to cut down on the amount of information that is sent to Trustees, whilst still providing a robust level of detail, to help focus attention on the key issues to consider linked to the application.

5.0 Salesforce Instructions

Go to <https://login.salesforce.com/> and login. Your username is your email address and the password you will have set yourself. If you have forgotten your password, please just let the office know and we can reset it for you.

When logged on:

- a) Click on the Triangle Trust logo on the top right and select 'switch to Salesforce Classic'. If there is no logo there, you will already have loaded Salesforce Classic.
- b) Select "Requests" in the menu across the top of the page
- c) Just below the menu on the left hand side you see the word "View" with a dropdown list next to it. Select "In Assessment" in the list and then click on the "Go" button next to it.
- d) You should now have a list of the shortlisted applications. To view the application click on the "Opportunity Name" and you should be able to see all the detail.
- e) To access the additional documents for each application you will need to scroll to the very bottom of the submission and look in the "Notes & Attachments" section.
- f) You will also see that within the application there is a direct link to the charity commission listing for the applicant (if it is a charity).
- g) You can click to the website either from within the application or from the list at the start.

6.0 Adjudication

Trustees are asked to read the visit report for each application prior to the meeting, to enable a joint decision to be made at the meeting regarding which applications should be funded. Should you wish for further detail from the documents that were submitted as part of the application process then please look at the documents on Salesforce. Hopefully the visit report provides all of the key information linked to you being able to make an informed decision about which proposals to support. All of the documentation submitted by applicants has been considered by the Director as part of the assessment process and discussed at the assessment visit.

7.0 Young carers grants Adjudication Overview

- Out of the **10** projects that were shortlisted all met the criteria and were considered suitable for funding. However, based on the budget available **8** have been identified as being the strongest applications in terms of **risk, difference to the organisation and priority**.
- Supporting these 8 applications would take spending to **£462,928** against a budget of **£500,000**.
- 2 applications are classed as not priorities and warrant further discussion.
- Should Trustees approve the funding recommendation of the **8** being proposed this will leave **£37,072** in the budget. I would additionally like to propose we also award each of the **8** a further **£5,000** to address cost of living increases. This can either be used by the organisation for the proposed project or to meet wider organisational costs. Should this funding also be awarded the spend would increase to **£502,928**.

Name	Requested amount	Recommended amount	Risk	Difference	Priority	Recommended
Brent Carers Centre	£58,899	£63,899				Yes
Bridges Project	£58,382	£63,382				Yes
Carers Trust Tyne and Wear	£58,610	£63,610				Yes
Powys Carers Service	£59,895	£64,895				Yes
Junction Foundation	£52,376	£57,376				Yes
Sefton Carers Centre	£55,192	£60,192				Yes
Solihull Carers Centre	£60,000	£65,000				Yes
St Helen's Carers Centre	£59,574	£64,574				Yes
TOTAL	£462,928	£502,928				

Name	Requested amount	Recommended amount	Risk	Difference	Priority	Recommended
Carers in Bedfordshire	£58,622	£0				No
Carers Plus Yorkshire	£57,770	£0				No
TOTAL	£116,392	£0				