

T.E.D. STEP-UP INVESTMENT PROCESS AND GUIDANCE NOTES



How do we decide which services/equipment to pay for?

Our engagement with older people and partners during the Vision and Strategy stage of our application to the Big Lottery Fund (including a survey of over 7000 East Lindsey residents), has provided an evidence base about activities most likely to reach socially isolated older people in East Lindsey. This will be supplemented with evidence gathered via T.E.D. events, T.E.D. Network development (organisational health checks) and our T.E.D. Friend beneficiaries. This information will be considered by the Commissioning Panel and the Project Management Group and will form the basis of each annual commissioning plan.

All of our commissioned services will help us to achieve our overarching outcomes:

- More older people will be better connected with volunteering, social, leisure and health improving activities leading to an enhanced quality of life
- More older people in East Lindsey will report that they do not feel lonely or isolated
- More older people in East Lindsey will feel positive about the opportunities that getting older presents
- Older people in East Lindsey will have more opportunities to influence the design and delivery and evaluation of services and businesses available to them

How much will each contract be worth?

The Step-Up Investment is for small community or volunteer groups (turnover of less than £25,000 pa). The group must have a constitution and bank account to apply for a Step-Up Investment worth up to £2,500. The minimum value of goods or services is £500.

T.E.D. STEP-UP INVESTMENT PROCESS AND GUIDANCE NOTES



The T.E.D. “Step-Up Investment Pot”

Groups can apply for up to £2,500 for a **new** activity that is likely to reduce isolation and loneliness for older people, or for provision to allow new people to access an existing activity. Strong applications would show how the activity is supported by and likely to be of interest to local older people, and how it is likely to be sustainable. Activities should not duplicate those already happening locally.

T.E.D. will directly purchase the goods and/or services on behalf of the group. No monetary grants are available under this scheme

We can support payments for:

Goods such as equipment needed to kick-start a new sports or activity project

Services including training, facilitation and room hire for activities. Commencement of the activity must be within 3 months of the decision.

Please include a cost breakdown including up to 3 quotes for each item with your application for the goods and/or services required. All quotes should include VAT and any postal or delivery charges.

How Will We Evaluate Our Services?

All applications will be assessed by an independent Commissioning Panel of older people. The Panel will assess the applications received and make the investment decision before passing them to the Project Management Group to sign off. The Panel will also help us to develop each annual commissioning plan.

To support the commitment to reducing barriers to involvement we will hold information day. Groups and organisations will be encouraged to register for these events in advance and an attendee list with contact details will be circulated to encourage partnership working. At the information day there will be a chance to ask questions

T.E.D. STEP-UP INVESTMENT PROCESS AND GUIDANCE NOTES



As part of the T.E.D. risk management process, any organisation submitting an application will have to provide due diligence information relating to financial, governance and key policies and procedures. Details of these are included as part of the application form.

What Is Our Approach To Selecting Delivery Partners?

We are committed to a process that is:

- Fair and transparent
- Straightforward

And will;

- Provide us with a proportionate amount of information to inform our project plan (i.e. how many people each partner will work with and how much the goods and services cost.)
- Assure us that each partner can successfully deliver

Furthermore, our processes will:

- Support the Asset Based Community Development ethos of the T.E.D. project
- Support the 'test and learn' principles of the project
- Foster a creative and innovative approach to improving older people's lives

Timetable – Step-Up Investment

- Applications are now open
- There is currently no deadline for applications
- Commissioning Panel decides on investments at the next quarterly meeting

We estimate that panel assessments of applications made to the T.E.D. Step-Up Investment Pot will be undertaken in October, January, April and July annually.

This process will continue until further notice



T.E.D. Step up investment Step by Step Process

Step 1

Getting Started

- Read the information about the activity, service or outcomes that you want to deliver on the T.E.D. website (www.tedineastlindsey.co.uk).
- Look at the contract value. If you are a community/volunteer group with a turnover of less than £25,000 then you can apply for an investment of up to £2,500 from our "Step-Up Investment".
- Download and read the application form and guidance notes from the T.E.D. website.

Step 2

- Think about the activity you would like to deliver. Talk to older people and use their feedback to help structure your ideas. **Think especially about how your activity will reach the most socially isolated older people in the area and meet the specific outcomes listed on page 1.**

Step 3

Information

- Speak to your T.E.D. Area Co-ordinator about your plans and make sure that they are relevant to the requirements
- Complete the application form. For the Step-Up Investment Pot complete the additional T.E.D. Healthcheck and Network Membership Form. Make sure that you highlight how older people who will be part of the project will be involved in the planning and delivery. **Ensure that you answer all the questions and include requested documentation.**

Step 4

Selection

- Your application will be scored by our independent Commissioning Panel against agreed criteria. Area Co-ordinators are not part of the panel.

T.E.D. STEP-UP INVESTMENT PROCESS AND GUIDANCE NOTES



- If your application is successful you will be asked to sign a contract and to talk about how soon your activity can start.
- If you are unsuccessful this time you can still apply again in the future . Speak to the Project Manager for feedback.
- If you are unhappy about the decision we have set up an appeal process. See our leaflet, Managing Complaints.

FAQs

Can I apply for a Step-up Investment for more than one activity?

You can only submit one application per round.

Is there a minimum amount?

Yes, £500.

What goods and services is T.E.D. unable to support payments for?

The Step-Up Investment cannot be used to fund:

- Salaries of any staff in the organisation applying to the fund
- Payments for work done by the person named on the application form
- Volunteer expenses paid in arrears. We can fund transport (e.g. minibus hire), training and refreshments for volunteers if the cost is included in the application.
- Currently funded services e.g. Room hire currently funded. For example, if a group currently meets at a community centre on Wednesday mornings and would like to apply for goods and services to increase the provision for that group or start new activities, T.E.D. cannot cover the cost for the Wednesday morning room hire. If the activity is scheduled for a time when the group does not regularly meet, T.E.D. can pay for the room hire.
- Any expenditure incurred or committed before the funding is agreed
- Political or religious activities (We can support activities run by faith-based groups or in religious buildings, as long as the activity is open to people of all faiths or none.)

My activity can only take place at a particular venue and/or with a particular facilitator/tutor. Do I have to include quotes for alternatives?

Yes but if you are requesting a specific venue or tutor please do give us full details as to why in your application and provide other quotes as well. In all cases the panel must be satisfied that the application represents best value.

T.E.D. STEP-UP INVESTMENT PROCESS AND GUIDANCE NOTES



Must my activity be restricted to people aged over 50?

Successful applications will show that the activity's main focus is helping to reduce isolation and loneliness of older people, and that the idea is supported by older people.

What criteria are used to assess the applications?

Our panel will score bids against the below criteria, giving equal weighting to each:

- **Supported by older people:** how well does the application demonstrate that the idea is supported by older people?
- **New projects:** does the application clearly demonstrate that this is a new activity/idea not duplicated elsewhere, or an existing activity that will be accessed by new people?
- **How the activity will make a difference:** how strong a chance does the activity have of reducing isolation and loneliness?
- **Beneficiaries:** how proportionate is the cost to the outcomes for the number of beneficiaries? Does the activity contribute to the outcomes of the T.E.D. project detailed on page 1.
- **Community impact:** is the activity likely to generate long-term community impact and be sustainable?

Any further questions?

If you need any more information about the Step-up Investment, or would like to ask anything before applying, please contact:

Jennie Tomlinson – T.E.D Project Manager
Community Lincs
The Old Mart
Church Lane
Sleaford
Lincolnshire
NG34 7DF

Tel: 01529 301969

Email: jennie.tomlinson@communitylincs.com

All tender guidance and documents are available at: <http://tedineastlindsey.co.uk>