

## **APPENDIX 3**

### **Case Studies from the Development Team at Oxfordshire Community & Voluntary Action (OCVA)**

#### **Case Study 1**

An Oxford-based charity asked OCVA to conduct an Organisational Health Check with their Administrator and the Chair of Trustees. We spent two hours with them, talking about their legal structure, policies and procedures. A short report was written for the Board of Trustees highlighting the issues which I felt were of most concern. The most important of these was they were not incorporated, despite employing several people and leasing their premises.

The concerns about trustee liabilities were increased by the overly elaborate governance structure which led to confusion about who was or was not a Trustee.

I was subsequently invited to a meeting of the Executive Committee (which includes all Trustees). At that meeting the Executive Committee agreed to become a charitable company.

Further meetings have been arranged to go through the procedure and OCVA will continue to support them, either through meetings or by email.

#### **Case Study 2**

A voluntary group of parents with children who have Downs Syndrome, wanted to hold a conference to inform teachers, teaching assistants and others interested in education about the latest methods of teaching mathematics to children with this specific learning disability.

The group approached OCVA for assistance with identifying sources of funding and how to write applications. After establishing that they were eligible to apply for funding we helped them access 'Funder Finder' \*

They applied to 'Awards For All' and were successful. The group were awarded £4,500.

We have kept in touch by email, identifying further possible sources of funding and ways of approaching different funders.

#### **Case Study 3**

OCVA has been working over a number of months with a user-led mental health group. They are delivering a vital service, but due to the nature of the group, they tend to be a little chaotic with very little written down.

OCVA has acted as an advocate for the group with Oxfordshire County Council and Oxfordshire Primary Care Trust (PCT) over Joint Commissioning this work. The PCT has agreed to fund the group until the Autumn.

OCVA is working with and supporting the group to ensure that:-

- Accounts are kept in an appropriate format, &
- Policies and procedures are written down.

OCVA will also be guiding the group through the new commissioning structures and help them to secure longer-term funding. They will also be in a better position to look for other sources of funding.

\* Funder Finder is a company limited by guarantee and a registered charity. The software is a method of matching grant-makers' interests with grant-seekers' needs.

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