

Restricted - Commercial=

Title Growing Community Assets - Scotland

Customer The Fund Lottery Fund

Customer reference 1084

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File reference M:\Marketing & Sales\Sales\Live Proposals\ED06265

Reference number ED06265- Issue 1

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Date 1st June 2006

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1 Method Statement

1.1 SUMMARY

GCA links to wider policy initiatives

We are pleased to submit our proposal to provide services to assist Big Lottery Fund in management of the Growing Community Assets (GCA) Investment Area.

The £50 Million GCA Investment Area is part of THE FUND’s resources, specifically ring-fenced for Investing in Communities, which aims to stimulate a step change in regeneration, where communities become agents of change. Investing in Communities is a major initiative that is a key to turning sustainable development policies into practice and to deliver social change to people most in need throughout Scotland.

The FUND will lead marketing and public relations across all four Investment Areas and integrate this with THE FUND’s Investment in Ideas fund. This proposal is to deliver services to the GCA Investment Area to provide:

- support to THE FUND’s marketing and Help-line entry point
- assistance to potential community-led GCA projects
- pro-active expert support to proposal development
- expert advice to a selection panel
- proactive support to projects and monitoring of project progress and financial efficacy
- data capture and linking to THE FUND’s data management systems
- evaluation of the portfolio of GCA projects.

THE FUND’s requirements for GCA

In addition to delivering individual sustainable community projects, THE FUND has specific requirements for the GCA Investment Area. These include:

- a project portfolio that has an urban and rural reach
- a fast start to ensure a pipeline of good proposals that commits the budget by March 2009
- support for projects to ensure they deliver sustainable outcomes
- support for projects that promote equality and social inclusion
- capturing of learning, both to develop individual projects and project portfolios and to underpin THE FUND’s future policy directions
- evaluation that includes hard measures (e.g. jobs created) and soft measures (e.g. increases in community organisation skills).
- working in partnership to add value to THE FUND’s investment

Our proposal is based upon a thorough understanding of these requirements and we will provide immediate, readily available and expert support to enable participants to engage with and gain maximum benefit from GCA.

A strong team.....
....giving full urban and rural reach

We have assembled a strong team to provide support to participants, covering both rural and urban areas. The core team is in place, covers the whole of Scotland and contains the full range of skills required. Our locations are shown in the diagram overleaf.

The team has four elements:

- A network of advisers based throughout Scotland, skilled in sustainable development and highly experienced in working with community organisations. They will provide the main local support to participants.

- A range of specialist partners including BTCV Scotland, Drew Mackie Associates, Cllr Maureen Child, Paths for All, Cycling Scotland, Gaia Architects, EDAW and Future Energy Solutions. In addition to providing expert advice and support, they will provide access to their community networks, help to promote GCA amongst their contacts, identify strong candidates for support and provide specialist skills where required.
- Excellent links to organisations with wide networks providing access to community groups who would be keen to access the fund; these include Scottish Community Diet Project, Communities Scotland, the Federation of Scottish Housing Associations, Scottish Urban Regeneration Forum, The Scottish Centre for Regeneration, Community Voices Network, Sustainable Scotland Network, Sustainable Development Forum, Scotland’s Ecological Footprint Project, Greenspace Scotland, Community Recycling Network, Co-operative Development Agency and Friends of the Earth Scotland.
- Our experienced team in Glengarnock providing overall programme management. They will manage the supporting processes and lead our networking, promotion, enquiry handling, information and grant management activities.



A fast start....

We will be fully ready and open for business from June 2006. We have:

- a team of local advisers in place
- a network of organisations that provides wide reach amongst community groups and that can provide specialist knowledge
- a substantial list of potential projects

....the team is in place

- specialists in developing sustainable projects
- extensive experience in community engagement and development
- an experienced management team in place
- existing management systems that can be very quickly adapted to deliver THE FUND’s needs

Our successful track record of mobilising for other programmes and our PRINCE 2 based planning and programme management methodology provides confidence that we will handle the implementation of GCA effectively.

Innovation to add value and capture learning



We will bring an imaginative and innovative approach to proposal and project support. We will promote learning across different dimensions of the programme through:

- assigning a local adviser to each potential project who would remain with the project until it is completed. Their function is to identify learning needs and bring in specialist support when required
- bringing together local advisers to identify best practice and to enable them to proactively pass on learning from similar projects
- sharing ideas using the web to actively promote ideas and good practice
- using established games and simulations to promote understanding of sustainable regeneration
- providing legal and technical support

Developing trust to deliver GCA aims

We will provide independent and proactive support to potential applicants and projects. This will build trust between our team and individual community groups.

The benefits of this trust will include:

- full understanding of sustainability issues during project development, which will deliver good quality proposals
- greater uptake of support during projects, which will improve their sustainability and improve community skills
- high compliance levels of community groups in providing data, that will allow accurate analysis for impact assessments and future policy developments

We want GCA to succeed

Our culture is one of working in partnership with our customers and our staff are motivated by the sustainable outcomes they deliver. In addition, all our partner organisations’ core visions align with THE FUND’s aims for the GCA: a step change in community projects and organisations to deliver improvements to those most in need. We understand the huge challenges in delivering the desired outcomes of the GCA Investment Fund and look forward to delivering this exciting opportunity to ‘make a difference’.

1.2 OUR APPROACH

Our approach to managing the GCA contract is guided by the requirements of THE FUND and our commitment to deliver a programme that fulfils THE FUND’s ambitions. These ambitions are to a large part reflected in THE FUND’s proposal evaluation criteria, against which we present the following approach and evidence of our ability.

The numbers in red lozenges shown in the margin throughout this proposal indicate corresponding evaluation criteria. The lozenges are provided for assistance only; however some areas indicated are also relevant to other criteria and some areas have not been indicated, particularly where large sections are relevant to several criteria.

Working across Scotland in urban and rural communities

1

We understand the aim for GCA to be inclusive both geographically and across sectors.

To ensure that we will deliver across Scotland’s communities, we have built a team that has geographical spread and relevant urban and rural experience. The team comprises Momenta as Programme Manager with Drew Mackie Associates and BTCV Scotland as core partners. Other partners include Cycling Scotland, Paths for All, Gaia Architects, EDAW and Future Energy Solutions.

Ability to work in partnership to achieve joint objectives

7

A number of other key organisations have expressed their support in working with us, and we will actively engage their networks particularly for promotion of the four lottery schemes and Investing in Ideas. These include Greenspace Scotland, Community Voices Network, Communities Scotland Scottish Centre for Regeneration, Sustainable Scotland Network, Sustainable Development Forum, Community Recycling Network and Scottish Community Diet Project. We will further develop this network after award of contract.

Added Value: Working to Address National Priorities

10

Within our Partnership we have an excellent understanding of the national policy context within which THE FUND will operate. A Partnership for a Better Scotland sets out the principles guiding policy development in Scotland. At the heart of these principles is the delivery of long-term sustainable growth.

Within this context, the Executive has set out a range of policies and initiatives that are aimed at addressing social inclusion, supporting lifelong learning, improving health, supporting the economy, improving public transport and empowering communities. The key policy documents include:-

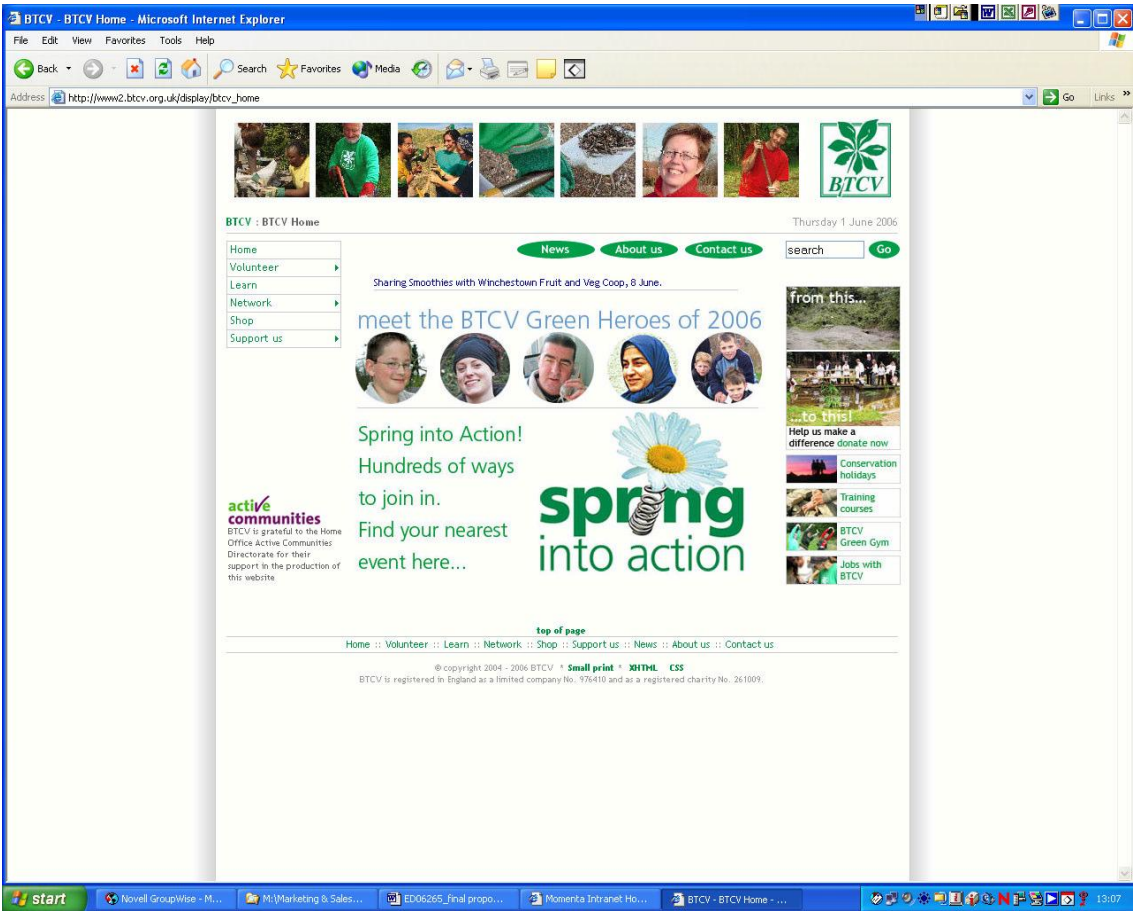
4

- Choosing our Future, Scotland’s Sustainable Development Strategy,
- A National Framework for Service Change in the NHS in Scotland (the Kerr Report)
- the Framework for Economic Development in Scotland,
- the Social Inclusion Strategy,
- the National Transport Strategy,
- the National Waste Plan

We recognise and welcome the increased delivery of public services through partnership activity, particularly the growth of community planning. The joining up of Government for better service delivery is key to achieving the ambitions of the Executive for a better Scotland.

Momenta along with our partner organisations have a strong track record in joined up sustainable project and programme delivery. We have, for many years, been delivering community based projects that deliver on the key Executive policy priorities.

1 BTCV, recognised as the UK’s leading practical conservation charity, are engaged in a wide range of initiatives which connects people with their local environment, building healthy, sustainable communities, while at the same time increasing people’s life skills. BTCV have set the precedent in this area and their publication “The Urban Handbook” is regarded as the ‘gold standard’ for practical community development work. They currently work with over 700 communities within Scotland and 4500 communities nationally. Their programmes include the Big Lottery Fund People’s Places Award Scheme and Breathing Places.



These programmes make a significant contribution to social justice and bridging the opportunity gap, and are delivered in a way that promotes the principles of sustainable development.

In addition, Drew Mackie Associates, are recognised across the UK as leaders in using innovative methods of community engagement to deliver projects that address the key policy areas of social inclusion and sustainable development. The innovation employed in the community engagement process demonstrates that we are committed to the Executive’s policies of renewing local democracy.

We have the skills and abilities to allow communities to address their challenges, to develop locally-based solutions grounded in community priorities and based on realistic delivery.



Delivering Financial Sustainability			<p>Our experience and motivation has given us a deep understanding not only of the environmental, community and social aspects, but also of the business practicalities without which a project is unlikely to survive.</p>
4	6	10	<p>Our Partnership is highly experienced in helping communities address the long-term viability and financial sustainability of projects. This starts with using innovative engagement techniques and games (e.g. the Engagment Game) to firmly establish the skills and goals of the community. These techniques have been developed over a number of years by Drew Mackie Associates and were used in the regeneration of Hunter Crescent (Fairfield), the Caistor Ltd and Huntly Ltd initiatives and various community sports projects. In addition, through our work on INCREASE we support communities to understand the financial implications of their project ideas through our expert advisory service.</p> <p>We know how to lever in additional funding, be it on a geographic or sectoral basis to enable projects to develop income streams to ensure their long-term viability.</p>
Key strengths of our team		6	<p>Our core team has been selected to provide a comprehensive set of expertise and sector coverage. These are briefly summarised below; further details and project experience are detailed in the next section.</p> <p>BTCV Scotland</p> <ul style="list-style-type: none">• full coverage throughout Scotland• experts in community engagement and support• projects already in development• access to urban and rural groups and networks <p>Momenta</p> <ul style="list-style-type: none">• specialists in programme management for the public sector• relevant experience from other programmes (e.g. INCREASE)• excellent connections to stakeholders and community networks• management team in place in Glengarnock <p>Drew Mackie Associates</p> <ul style="list-style-type: none">• innovation in community support• experience of community engagement• expert in sustainable development• urban and rural experience <p>Future Energy Solutions (FES)</p> <ul style="list-style-type: none">• sustainable energy expertise• experience of working with communities• knowledge of funding sources• due diligence expertise <p>Cycling Scotland</p> <ul style="list-style-type: none">• key organisation for cycling in Scotland• experts in sustainable transport• links with cycling groups• technical expertise <p>Paths for All</p> <ul style="list-style-type: none">• leaders in footpath network development• understanding of communities’ access needs• technical and legal expertise in access issues• links to community networks

Knowledge and Experience in the Specific Areas of Investment of GCA	1	3	4	<p>Gaia Architects</p> <ul style="list-style-type: none">• leaders in sustainable architecture and design• experience of community development and support• award winning community projects• understanding of community needs
				<p>EDAW</p> <ul style="list-style-type: none">• expert technical advice in planning and landscape architecture• knowledge of sustainable design issues• committed to addressing social inclusion issues• expertise in environmental management
				<p>BTCV UK specialises in working with people within their communities to bring about positive social and environmental change. Working with 130,000 volunteers a year BTCV provides a powerful mechanism for change and improvement in society as a whole. They actively encourage people to make a positive contribution to the society and community in which they live, which brings considerable personal benefit and plays a part in helping to tackle social exclusion.</p>
				<p>The scale at which BTCV operates is significant in terms of the practical impact they make on delivering policy into action. Across the UK, BTCV is delivering on its goals to enrich the lives of 1 million people, to improve the biodiversity of the local environment of 20,000 places and support 5000 community based groups.</p>
				<p>Through BTCV we already have a good relationship with the Big Lottery. In 2001 BTCV was selected by the Big Lottery to run the People’s Places Award Scheme – a scheme targeted at deprived and disadvantaged community groups. The Big Lottery Fund was delighted with the performance of BTCV in delivering this initiative. The Chief Executive of the Big Lottery Fund, Stephen Dunmore regarded BTCV as a key partner in delivery of the Award Scheme, which was one of the key delivery methods for making sustainable communities. Other initiatives where BTCV have worked with the Lottery include, Environments for All and Natural Talent.</p>
4	7			<p>BTCV Scotland operates a number of community and volunteering programmes from offices based in Stirling (HQ), Edinburgh, Broxburn, Falkirk, Coatbridge, Glasgow, Ayr, Dumfries, East Ayrshire, Fife, Aberdeen, and Inverness. These programmes include community development initiatives, local conservation volunteer teams, Green Gym groups, healthy walking groups, conservation volunteer action breaks, youth development initiatives, recycling programmes, environmental education, training and personal development courses. There are also specific projects based around involving marginalised communities, groups and individuals. Overall, BTCV Scotland supports around 26,000 volunteers a year across around 600+ projects, improving local environments and opportunities.</p>
				<p>BTCV’s Community Development and Support Unit proactively seeks to enhance a community’s ability to influence how land is developed in their area and facilitates the process of decision making between Community and Local Authority. Their support for the community also enhances their ability to secure funding packages available to the Voluntary Sector for regeneration projects and also assists in determining how Capital budgets within Local Authorities are spent.</p>

BTCV are delighted to have been selected by the BBC to implement their Breathing Places campaign, which aims to inspire a million people across the UK to take action to transform their local neighbourhoods by creating new green places for people and wildlife. The media coverage associated with this joint venture will be invaluable to BTCV’s national profile and will raise awareness of the importance of community-based regeneration.

Examples of BTCV-supported projects:

- Greengairs and Wattston Regeneration – North Lanarkshire

In full consultation with the local community management group and partnered with EB Scotland, who manage the landfill tax for the adjacent Greengairs Landfill site, the following has been delivered;

- A children’s play park in each village at a total investment of £30k
- An extension to the local Bowling Club which represents the main social focus of the community at a cost of £80k
- Project Management of the Stanrigg Memorial Park which represents the buffer zone between the landfill site and the villages at a total investment of £450k
- Construction of a Multi-Play facility costing £60k
- Design and Construction of a CyberCafe and IT Training facility £40k

- Torrybay – Fife

In partnership with the local community, Fife Environment Trust and Fife Council BTCV reconstructed a 200m portion of sea-defences to protect the communities only safe access to the beach via a European funded park and parking area. Cost of this work £80k part funded through ERDF.

- Dundee – City of Dundee

In partnership with the local authority we reported upon and constructed a significant portion of the community Paths for All delivery at an investment of approx £150k

- PEOPLE’S PLACES



BTCV was selected by the Big Lottery Fund to run the People's Places Award Scheme under their Green Spaces and Sustainable Communities initiative. The People’s Places award Scheme has enabled 722 communities across England, mainly in deprived areas, to bring about much needed improvements to their neighbourhood by creating or improving a “people’s place”.

- Highland Youth

Following a 2 year pilot project funded through the Scottish Community Fund costing £50k we assist the development of young people disadvantaged through rural exclusion who work with our volunteer teams to build confidence and a sense of worth. Highland Council Education Department contribute financially in recognition of the success in helping resolve many of the issues that prevent young people continuing in formal education. The project is now funded through Heritage Lottery in recognition of the contribution of young people to enhancing the natural heritage of the Inverness area. The current investment is £45k.

See more BTCV projects in Appendix 1.

Knowledge and Experience in the Specific Areas of Investment of GCA



Through the programmes Momenta operates in Scotland including INCREASE, Envirowise, SAFED and Knowledge Transfer Partnerships we have developed a strong understanding of the delivery of policy into practice.

- 2 We have excellence in grant management through the delivery of the School’s Sport’s Partnership, Maritime Training Programme and Knowledge Transfer Partnerships.

Through our experience of delivering the INCREASE Programme (£10m sustainable waste fund) we have developed a broad knowledge of the community sector in Scotland.

Working closely with these groups and supporting them throughout the pre- and post-application process, we have developed an understanding of their needs and requirements in order to develop projects. We have also gained an understanding of requirements to sustain projects after funding and how the projects can be supportive of community groups’ wider community development aspirations.

Applicants for INCREASE Programme funding come from all over Scotland and include groups from both urban and rural areas.

Examples of INCREASE Programme Awards;

- Capital Funding for Furniture Recycling Centre: Community Opportunities for Participation in Enterprise (COPE), Lerwick

COPE Ltd based in Shetland, is a Community Enterprise that was established to relieve the poverty and distress of adults with learning difficulties by offering training, support and employment opportunities. COPE has set up a number of sustainable social enterprise companies including The Furniture Recycling Centre. The capital costs of erecting the Centre were met by INCREASE. This key asset will not only increase their recycling capacity but also generate substantially more income enabling the Centre to become one stop closer to financial independence. INCREASE Award: £40,000

- Establishment of an Earthship Visitor Centre: Greenhead Moss Community Trust, Wishaw

Greenhead Moss Community Trust was established seven years ago to lead on the development and continued management of Greenhead Moss Community Nature Park, situated on the east edge of Wishaw (North Lanarkshire). The INCREASE Programme awarded part-funding for the development of an Earthship Visitor Centre within the Nature Park. The Centre was to provide a high profile community facility within an area of high economic deprivation. The Earthship would not only enhance the wider delivery of social, economic and environmental benefits of the Nature Park, but would also demonstrate and promote concepts of recycling and sustainable living through education and life-long learning services. INCREASE Award: £39000

- Glasgow Recycle: The Wise Group, Glasgow

Tackling disadvantage and social exclusion through focusing on employability is at the core of The Wise Group’s ethos. Glasgow Recycle supplies free collections of paper, cans and plastic bottles to schools, and teachers are also provided with education packs and fun recycling workshops, to encourage young people to reduce, reuse and recycle their waste. INCREASE Programme funding allowed Glasgow Recycle to target all Glasgow schools and nurseries, by securing three key posts. The Glasgow Recycle project has had a positive impact on the wider community and provides an innovative mix of social, economic and environmental benefits. INCREASE Award: £105000.

Knowledge and Experience in the Specific Areas of Investment of GCA

Drew Mackie Associates (DMA) have long experience of working with communities to identify, promote, develop and run asset-based community projects. Examples are:

1 3 4

- Community sports projects (swimming pools, sports halls, combined community and sports halls); DMA have written the guidance for sportScotland on the use of trusts in community and local authority sports projects and in the creation of combined sports and community centres.
- Community managed workspace
- Community radio
- Community based tourism
- Landscape and clean up projects
- Housing cooperatives

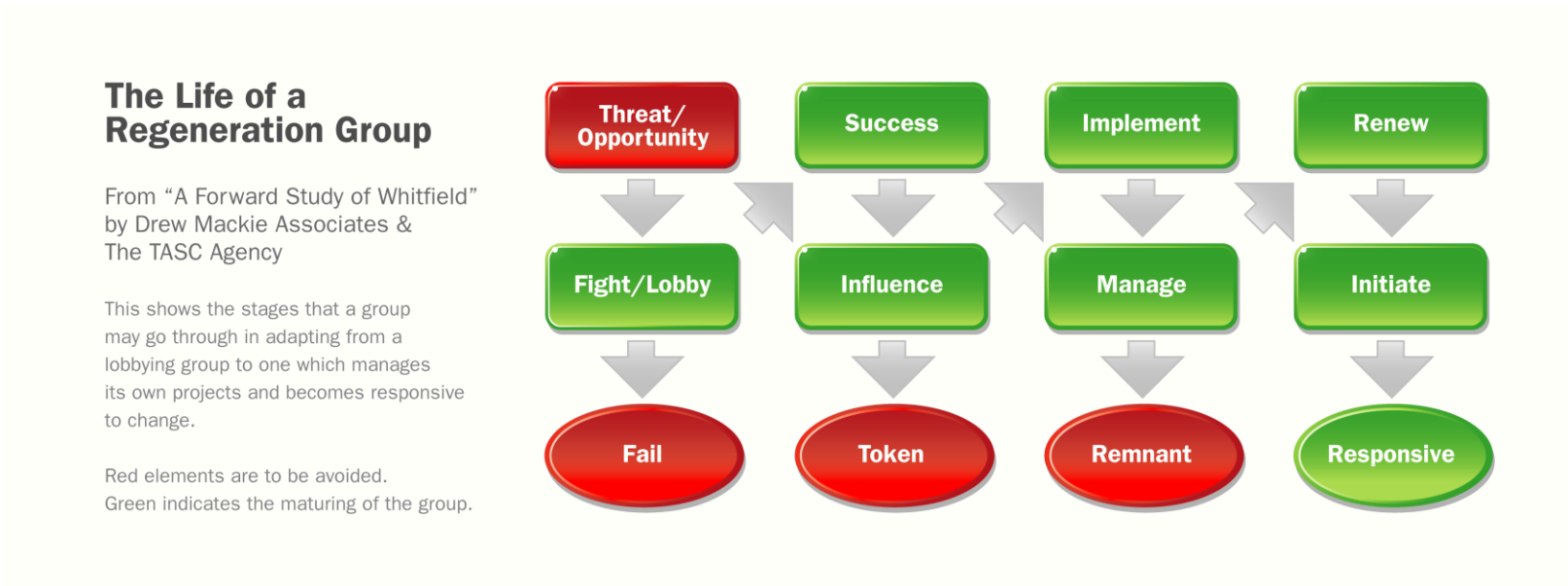
DMA have also acted as the technical and training support for community groups involved in this work in Scotland, Northern Ireland and England. They have set up community organisations (trust, community company, cooperative, etc) and have written the advice sheets for the Civic Trust.

DMA have developed models that allow communities to:

- Assess the diverse economic effects of a project on the overall income, circulation and outgoings of a community
- Assess the general performance of a locality in terms of sustainability and the likely effects of specific projects
- Build their own project business plans that take into account the wider effects of the project on the community

DMA therefore understand the way that communities work and the appropriate methods that allow groups to initiate, develop and manage projects and this knowledge has been developed over many years of developing practical projects in the field.

DMA have undertaken work on community group development issues and the following diagram illustrates our understanding of the stages that a group may go through in developing their ideas.



Examples of DMA-supported projects:

- The Wales Spatial Plan – Consultation

DMA have designed and delivered projects to help communities engage in this process, whilst ensuring their understanding of sustainable development principles.

- The Regeneration of Hunter Crescent, Fairfield, Perth

The regeneration of this estate, which suffered the highest level of multiple deprivation in Scotland based on the key sustainability principles of community involvement and sustainable design. The outcome of this was the complete transformation of a blighted area into one that has a waiting list for new resident. This project has been recognised by the Sustainable Development Commission in its publication, Mainstreaming Sustainable Regeneration as an exemplar project and it has been short-listed for the World Habitat Award, as a best practice example of supporting the growth and development of organisations within a sustainable development context. Both Drew Mackie Associates and Gaia Architects were key in delivering this successful initiative.

Knowledge and Experience in the Specific Areas of Investment of GCA

1 3

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Future Energy Solutions (FES) is a sister company of Momena and provides consultancy in the areas of energy and environmental policy advice and practical support for sustainable energy projects and ideas.

FES currently has approximately 20 staff in Scotland who are at the forefront of market and technology development and have advised the Scottish Executive, communities, the devolved administrations and regional development agencies on the prospects for sustainable energy technology.

FES is experienced in community consultation both at a strategic level [on regional and local renewable energy targets] and on specific projects.

The following projects are examples of due diligence and Community projects undertaken by FES.

Work on community involvement in renewable energy for the DTI's Renewables Advisory Board (RAB)

RAB's planning working group has had a programme of work on community involvement in renewable energy over the last two years. FES has provided project management and technical support. This has included consulting regional bodies in England, Wales, Northern Ireland and Scotland on the current status of renewable energy and the scope of work that is appropriate. The projects have focused on wind and have covered community benefits, community engagement and developing finance models that enable community ownership.



Facilitating the Establishment of Rural Energy Service Companies (RESCO’s)

FES were commissioned by the Department for International Development to develop a ‘step by step’ electronic and paper ‘tool’ to help and encourage local entrepreneurs and community organisations in developing countries start local energy service companies where grid connection is unlikely, or certainly not imminent. FES produced a business planning guide including identification of markets, equipment selection, financing (including cash flow management) and contractual considerations all geared towards the development of a long term sustainable business. Additional guidelines also cover regulatory matters and customer and employee management.

Knowledge and Experience in the Specific Areas of Investment of GCA

1 3 4

Cycling Scotland have undertaken a wide range of community focused initiatives throughout Scotland from Inverness to Dumfries which include:

- a commission from North Lanarkshire Council for a series of four feasibility studies and design-build projects within the council area. The first feasibility study covering the Kilsyth and Croy area has been completed with a second study looking at linking Cumbernauld and Airdrie at a preliminary stage
- within South Ayrshire Council, Cycling Scotland was appointed to design and develop Local Cycle Networks in five towns and in rural areas connecting the towns. A preliminary study determined the latent cyclist demand and consequently the utilitarian routes preferred by cyclists. Two cycle route feasibility studies have been completed, one in Ayr and one for the rural area between Girvan and Maybole, and work is progressing on the other areas. The final product is a detailed description of the schemes, estimated costs, and identification of salient pinch points. The proposal includes piloting centreline removal schemes as a means of accident prevention and increasing cycle usage.

Knowledge and Experience in the Specific Areas of Investment of GCA

1 3 4

Gaia Architects have considerable experience in working with communities throughout Scotland developing sustainable projects which have community participation at their heart. They specialise in community architecture and ecological design. Examples of their work include, housing projects such as the award winning the Fairfield Co-operative - still ongoing after 15 years – through to more recent work on regeneration in Renfrew. This work has helped to develop a methodology which has proved to be transferable to other types of development - such as urban design strategies for Forlì in Italy, and industrial park policies for Newcastle.



Knowledge and Experience in the Specific Areas of Investment of GCA

1 3 4

The Paths for All Partnership was set up in 1996 as a Company Limited by Guarantee with Charitable Status.

Its long-term vision is a Scotland of active communities where each community has a network of paths which people want, and are able, to use for recreation and everyday journeys. This will deliver health, community, sustainable transport and economic benefits for Scotland. Its short-term Mission is to facilitate the creation of well designed, managed and promoted networks of paths for everyone.

There are three main themes to the work of the organisation: Partnership & Leadership, Outdoor Access and Paths to Health.

The Partnership currently has 19 Partner organisations representing relevant public sector and national representative bodies, and a staff complement of 16 full time equivalents.

Knowledge and Experience in the Specific Areas of Investment of GCA

1 3 4

EDAW is a world renowned environmental consultancy specialising in

- urban design
- planning
- landscape architecture
- economic development.

They develop sustainable solutions that bring long term benefit to all stakeholders and community interests. Careful consideration of community groups needs informs their work and integrating the built environment within a robust social and economic infrastructure is key to their way of working.

Supporting the growth and development of organisations within a sustainable development context

In the earlier section, “Added Value: Working to Address National Priorities”, we have demonstrated our understanding of the sustainable development policy context and fully subscribe to supporting organisations to deliver GCA projects that will fulfil these aims.

We have also provided a large range of project examples which illustrate our ability to deliver sustainable development at a local level.

At all times we will consider whether our activities are delivering projects that fulfil GCA aims for projects that result in:

- significant regeneration of the local area and the creation of sustainable livelihoods
- improving the appearance, safety, accessibility, and biodiversity value of community environments and green spaces
- providing essential community services, and increasing access to these
- community-based approaches to the production, consumption and celebration of healthy, sustainable food
- community-based approaches to renewable energy, sustainable buildings and sustainable resource use
- enabling better access to local services and environments through cycling, walking and sustainable motorised transport

As a delivery partnership, our understanding and experience in sustainable development is second to none.

		<p>We are actively involved in the Sustainable Scotland Network, the Sustainable Development Forum and are actively implementing a range of sustainable development networks.</p>
	7	<p>Within this context of sustainable development we are highly experienced in supporting the growth and development of organisations and have a available pool of expertise in both general and topic specific community development support.</p> <p>To help ensure that GCA delivers on all aspects of sustainable development, we will use a simple sustainable development checklist for community groups to demonstrate their contribution to sustainability. It will help groups develop more holistic thinking, raise their aspirations and develop learning. In addition to this we will use, where appropriate, the Sustainability Model and the Sustain Game, which have been developed by Drew Mackie to engage with communities and develop better understanding of the concepts of sustainability.</p>
	3	<p>In order to ensure excellence in community group support we would employ a mix of techniques, some innovative and others tried and tested. These would include a range of participatory methods to assist communities in determining an appropriate picture of the future and developing that as part of their project application. The methods used to do this would include the “Simplex” method of participation game design and the “Regeneration Game” which was developed for NIACE and funded through ODPM and which allows communities to explore good regeneration practice.</p>
Setting up service provision to a tight timescale	5	<p>We understand THE FUND’s desire to get GCA up and running promptly. There is a large amount of work to be done to get funds committed on good projects and a strong start will establish the momentum for a successful initiative.</p> <p>Our approach to the lead-in phase is described in detail later, in Section 2. In outline, we can give confidence that we will be fully ready and open for business from June 2006. We have examined the requirements carefully, planned how we will meet the lead-in timescales and considered potential risks and their mitigation. Key elements of delivery in terms of people and systems have already been sourced:</p> <ul style="list-style-type: none">• we have identified a complete team from our own staff and from partners with whom we have signed agreements• we have modern IT systems in place for providing database and web services and our experienced staff will be able to configure these systems for GCA support within as little as one week, if required, of agreeing a specification.• we have direct access to a wide range of networks who will help us to identify further project opportunities. These networks include Community Voices Network, Sustainable Scotland Network and Scottish Community Diet Project, Cooperative Development Agency and others. <p>More immediately our team has already identified a number of projects that have the potential to apply to the fund. We will immediately work with these and others already in the pipeline to ensure that quick wins will be generated where appropriate. The following are examples of such “ready to go” projects:</p> <p>Pulteneytown People’s Project – Wick, Caithness</p> <p>A community regeneration project that in the first instance would result in improvements to the Community Centre, Sports Fields and general open spaces. Approx cost £200k. Potential partners are UKAEA.</p>
Projects ready to go.....		

Kinlochewe Community Project
The proposed development of 4 acres of community owned land on the edge of Kinlochewe. The proposal intends to build up to four low cost community houses, a fire station, a recreation field a garden and small play park. Approx cost ± £750k

Ballachulish Boat Sheds – Highlands
The full regeneration of the remainder of the sheds in partnership with Highland Council and Historic Scotland. The sheds hold potential for developing premises for new small businesses in the area. Approx cost £100k

Newtyle Path Network Extension
BTCV Scotland previously assisted the Community of Newtyle to establish a comprehensive Community Footpath in and around the village of Newtyle (circa £52K). This project also created extensive links with the cultural and environmental heritage of the site, and surrounding communities, through the production of local information leaflets. Building on this success, the Community have approached BTCV Scotland to assist them in their wish to undertake a further and significant expansion of this community recreational resource. Approx cost £22K

5

Westmuir Community Woodland Park
This project aims to emphasise and formalise many existing local walking routes and create new paths to enable both locals and visitors to the village a chance to explore and enjoy an area of considerable habitat and cultural value. In total approx. 1000 m of new path will be created including a further 188 lin m of boardwalk, using recycled materials, through the wetland areas. This will be further enhanced through the provision of a small carparking area, site interpretation panels, seating areas, disabled access provision and waymarking. Estimated project value £100K. The Community anticipates building on this early work by creating the momentum to deliver further improvements to their village infrastructure amounting to approx £500k

Water of Fail Environmental and Access Enhancement Initiative – South Ayrshire
Linking the historic villages of Tarbolton and Failford, this project aims to formalise the pedestrian access routes along the Water of Fail as it links into the nationally renowned River Ayr Walkway whilst also undertaking a challenging and comprehensive biodiversity improvement programme aimed at improving water quality, riparian habitats and helping to change the land management practices of the riparian landowners to assist in the long term viability of this watercourse. Estimated value £250K

Strathblane School Sports and Community Play Facility Project
This project aims to undertake drainage improvement works to grounds adjacent to Strathblane Primary School and the installation of a new children’s play facility within the adjacent public space. These works will compliment and already growing list of community led environmental improvement works which have largely come about through the sourcing of external funds by the community themselves. Estimated project value £150K

Voluntary Park – Ayr
Following from the successful Gardening and Numeracy and Literacy initiative, BTCV Scotland is assisting the community to adopt the management of a large greenspace in North Ayr. South Ayrshire Council are in the process of transferring responsibility. The park will be developed in accordance with the community’s wishes into a recreational facility that encourages activity and supports biodiverse habitats. Approx cost £250k

Auchinleck – East Ayrshire

Early development work in delivering a community gardening scheme similar to Ayr is creating the potential for further community based initiatives. Organic Food growing and access to the countryside are possible priorities. Acquiring sites and creating the infrastructure would cost approx £150k

Inverclyde

Early development work in partnership with the Regeneration Unit and Greenspace Scotland has revealed 20 ex-Housing sites that can be returned to the communities as part of an open-space programme. The communities will play a central role in their development and would result in an on-going range of regeneration work. Bio-habitats and recreation facility provision could result in early development work of approx £750k

Knightswood – Glasgow

The Lincoln Avenue area has been designated a priority by the City of Glasgow in regenerating recreational facilities in Knightswood Park along the Garscadden Burn. Early work will include a Multi-Play area assisted by BTCV Scotland, Groundwork and Barclays. However the full regeneration work highlighted by the community as a need would result in new football pitches, pavilions and access work. Approx value £1.5m

Black and Minority Ethnic Equality and Integration – Scotland Wide

Based upon our groundbreaking work we would encourage indigenous communities and the communities growing from New Arrivals to contribute to improving their local and host environments. This could result in a range of physical of open-space development opportunities based upon bring communities together with a common purpose that benefits all. This would form the cornerstone of our Equality and Integration work in partnership with the Scottish Executive, Scottish Refugee Council and numerous representative Organisations around Scotland. Approx delivery cost £600k

Allotments

Food Growing within communities is an excellent vehicle for establishing not only a better awareness of healthy living but for creating improved community cohesion. There are several Allotment Societies and they would be encouraged to create development plans for their sites with a view to creating true community resources. Indicative cost for Glasgow £1mIt should also be noted that BTCV Scotland undertakes around 500-700 community-based urban and rural projects each year and at any time there are 20 to 30 projects “in the pipeline” that are likely to be suitable and that could readily be worked up into applications for GCA funding. We will encourage such suitable projects to enable them to move quickly from potential to reality.

Our successful track record of mobilising for other programmes, in each case supported by a rigorous planning methodology, provides confidence that we will handle the implementation of GCA effectively.

Prospects for achieving best results for GCA projects will be strengthened by using an experienced manager and advisers who can bring their knowledge and skills to bear from the moment they start working with THE FUND.

We understand that THE FUND is seeking an experienced programme manager and skilled staff so that excellent delivery of GCA will be achieved.

Momenta’s business by-line is “policy into practice” and this expresses the focus of our business. We are expert at constructing teams and organising processes that deliver customer requirements. Whilst we normally have all the required processes and systems in house, we frequently supplement our delivery skills

Providing skilled and experienced people capable of delivery

6

with partners and sub-contractors. We find that in this way we can assemble teams that properly match the requirements of a programme (rather than force-fitting those internal staff who are available into inappropriate roles). One of our skills is in managing such groups of people and we find it a very effective way of working. It has the additional benefit of forging new ideas and creativity through bringing different organisations together.

For support to GCA we have assembled a team that provides the people with the skills and experience required. The key strengths of our team members are summarised earlier in this section and the people are described in detail in Section 3.

In outline, Momenta will provide the overall management processes and systems (i.e. programme management, IT systems, stakeholder management, promotion support) and jointly with our team partners we will provide project support through the different phases from enquiry through to application, project implementation, post-project plans and evaluation.

From within our team we will provide expertise in:

- community engagement and development
- walking and cycling
- legal within the area of land access
- sustainable architecture, design and landscaping
- sustainable energy, transport and design
- environmental management
- planning.

We will source particular other expertise externally as required, for example in quantity surveying, legal, valuation and accounting.

Working with THE FUND and other organisations to achieve joint objectives

7

In helping to deliver GCA, we will work in partnership with THE FUND. This will start with agreement of targets/KPIs and mobilisation plans, and continue through open reporting, discussion of issues that arise and agreement of actions that ensure progress. We have a strong joint objective with THE FUND to deliver sustainability and will also work with THE FUND to ensure

- a project portfolio that has an urban and rural reach
- a fast start to ensure a pipeline of good proposals that commits the budget by March 2009
- support for projects to ensure they deliver sustainable outcomes
- support for projects that promote equality and inclusion
- capturing of learning, both to develop individual projects and project portfolios and to underpin THE FUND’s future policy directions
- evaluation that includes hard measures (e.g. jobs created) and soft measures (e.g. increases in community organisation skills).
- working in partnership to add value to THE FUND’s investment

The success of GCA will depend on engaging and working with a wide range of organisations; such support will underpin all phases of the successful delivery of GCA, from promotion and the identification of new project proposals, institutional and popular energy and support during a project through to on-going community support long after GCA funding has ceased.

Through BTCV we already have a good relationship with the Big Lottery. In 2001 BTCV was selected by the Big Lottery to run the People’s Places Award Scheme. BTCV also worked with the Lottery on the Environments for All and Natural Talent initiatives.



7 Momena has an excellent track record of working closely with public sector customers to deliver a range of programmes. Different customers and different programmes require us to contribute different mixes of skills and delivery mechanisms and we are adept at working with our customers to match their requirements. Our approach remains flexible as the requirements of a programme often change as we learn from implementation or as customer priorities adjust.

Through the connections of our team we will engage with the full diverse range of organisations that are able to support the GCA programme. There are many networks that have expressed their willingness to work with us and through them we will be able to reach all community groups throughout Scotland.

We will engage with these organisations highlighting where the GCA Fund can help them deliver both their strategic and localised priorities.

Realistic pricing
Setting up service
provision to a tight
timescale

Our pricing information is presented in Section 6. We have examined the requirements in detail and our price is based on a realistic assessment of the effort required to provide THE FUND with a service that:

- 8
- understands THE FUND’s requirements
 - has a flexible approach
 - is delivered creatively and with enthusiasm
 - provides expertise in relevant areas
 - is underpinned by effective systems and processes

Creating
impact

7 9 In becoming a partner of THE FUND, we will help to realise the full potential of GCA. Our track record of working with the Scottish Executive and other public sector bodies in Scotland and the rest of the UK provides evidence of our focus on delivery and commitment to achieving impact.

We fully subscribe to THE FUND’s ambitions to move forward the agendas for sustainable development, social inclusion and equalities. GCA is a wonderful opportunity to engage the energies of groups that traditionally may not apply for public funds and the support we will give to reaching and helping these groups will help bring them into the mainstream. Projects will demonstrate practical ways in which sustainability must form the new mainstream and GCA will help change and public and organisational opinion so that existing non-sustainable activities are increasingly seen to be unacceptable.

An important legacy of GCA-supported projects, alongside enhanced awareness, will be enhanced capacity to carry out further sustainable community projects. We will promote community-learning activities to ensure that experience is widely shared and adopted, including into other communities.

9 Our culture is one where we work in partnership with our customers to deliver programme aims. In working with THE FUND, we will aim to develop an open relationship, where our staff are readily accessible, where any issues are raised promptly and where we can readily contribute ideas and discuss options for improvement of the programme. We will always keep the aims of the programme paramount and be flexible in our delivery to ensure that the aims are realised. We will be responsive to THE FUND’s needs and will discuss and adjust priorities to respond to real world pressures.

We are committed to continuous improvement and will use evidence gathered through project evaluation to ensure the GCA programme learns from its successes and failures. We will discuss with SQW the opportunities for bringing lessons from the Scottish Land Fund programme into GCA, and we have described earlier in this section how initial findings from SQW’s evaluation will be built into the training of our regional advisers. We will also seek improvements in our internal services – indeed the strength of the services we bring to GCA is built on innumerable process improvements made in existing programmes and we are never complacent about further improvement.

As described elsewhere, we have constructed a core delivery team with contacts and networks across Scotland and into a wide range of community sectors. We will work with many other community networks to ensure the fullest reach of GCA. This strong networking and people-focussed side of our offering is supported by effective modern delivery tools and processes. Amongst these our IT systems for database and web have been developed to manage similar programmes (such as Envirowise and KTP) and will be readily configured to support GCA.

9 We believe that the management of our delivery team by Momenta will ensure the necessary impartiality, where projects are selected and supported on merit alone. Impartiality is vital if GCA is going to reach all areas and earn and keep the wholehearted support of the public on whom the programme ultimately depends.

Our suggested KPIs presented in Section 4.2 relate to several areas where we will create and measure impact. Thus we will achieve a geographical and technical spread of projects, a high success rate of applicants, and commitment of funds to an agreed profile and a portfolio of successful projects confirmed by independent evaluation.

Flexibility

As a partnership we have a strong track record of operating in a flexible manner. By the very nature of the work we do we need to be able to respond to changing local needs and this regularly happens within the context of BTCV Community projects, where communities may wish to amend their projects as they grow in confidence and opportunities arise. The work that Drew Mackie Associates undertakes is overwhelmingly about community engagement and again the needs and aspirations of communities alter over time as groups mature or new opportunities arise, perhaps through a new funding stream or new legislation.

9 In addition to the above, Momenta have proven to be flexible, responding professionally and innovatively to Government Departments. In our work promoting the use of LPG for transport the DTI (a UK-wide project, that included a specific focus on the fuel poverty areas including the Highlands and Islands), we introduced innovative stakeholder marketing techniques that unified the supply industry, created a step change in their marketing skills and brought in additional funding into the programme. We also had to respond overnight to a Treasury announcement of a review on LPG taxation, which effectively caused a total hiatus in the market. We totally reviewed implementation of our marketing strategy and engaged a very angry industry base (particularly the very small

		<p>mechanic firms). Our flexibility and stakeholder engagement work was rewarded by total support when the programme launched six months later and we achieved a doubling of the previous market highs.</p>
Impartiality		<p>We work only for the public sector, undertaking project and programme management services to turn policies into practice. We are thus independent of any product or group and have no conflicts of interest in the Growing Community Assets programme.</p>
Equalities mainstreaming		<p>As a partnership we are committed to Equal Opportunities. We have a strong track record, of working with ethnic minorities groups throughout the UK and working with hard to access groups. Momenta is at the forefront of the development of social marketing techniques, working with the National Consumer Council to assess ethical concerns associated with health-related social marketing and developing guidelines for Government Departments considering a social marketing approach. We have also worked with the Food Standards Agency on now to reach and influence small businesses within ethnic minority groups. We work in partnership with the Equality Foundation in our assessment of suppliers to Job Centre Plus for the Department of Work and Pensions. Our own equal opportunities policy is show in Appendix 3 and is implemented by our Human Resources Partner Kate Forster, who previously worked at the Slough Race Equality Council, working to the Commission for Racial Equality.</p>
Sustainable development mainstreaming	9	<p>We are very strong in the area of mainstreaming sustainable development from the strategic policy level down to very practical implementation. Through our close involvement with the Sustainable Scotland Network and the Sustainable Development Commission we have been engaged at a very high level in helping shape Choosing Our Future, the new Scottish Sustainable Development Strategy. In addition to this, BTCV and the Executive Sustainable Development Team are in advanced discussions concerning BTCV taking a lead role in implementing the community engagement elements of the Strategy.</p> <p>The projects and initiatives we undertake fully demonstrate our ability to mainstream sustainable development, for example the award winning regeneration of Hunter Crescent in Fairfield, Perth, the Twecher Regeneration initiative, the new Visitor Centre at Glencoe, Healthy Walks initiatives, Breathing Places, Increase. All these projects demonstrate our commitment to community engagement, sustainable design, biodiversity enhancement, health improvement, training, employment, resource efficiency and renewable energy, all key elements of sustainability.</p> <p>Our understanding and integration with the key sustainable development organisations within Scotland and the UK is second to none. As a partnership we are fully committed to the principles of sustainability and at all times bring these to bear in project design and implementation. Gaia Architects are regarded as the exemplars in sustainable design and architecture and we will bring these technical skills, along with the sustainable transport ones of Cycling Scotland to bear in project design and implementation.</p>
Responsive Culture	9	<p>Undertaking the work we do means we have to have a responsive culture. We cannot work so successfully with communities, the private sector and government without being able to be responsive to both individual participant needs and changing market environments. Being responsive means basing our actions on the needs of programme participants: our role is to facilitate their actions. This means:</p>

- Answering queries quickly and accurately, so they gain added value from participation in a programme
- Developing a flexible range of tools that meet participants’ needs and that effectively support their practical actions
- Ensuring tools evolve with developing experience and that new best practices are found and disseminated

We are also responsive to customer needs. We only work for the public sector and so fully understand the demands of budgets, publicity and delivery. We have ensured the INCREASE programme meets budgetary commitments of SEERAD through responsive management of community groups. We also successfully responded to an urgent end-of-year request from the Executive to train significant numbers of extra drivers under the Safe and Fuel Efficient Driving (SAFED) programme aimed at the difficult road haulage market.

IT Systems

2

All of our corporate network and IT resources are subject to security protection by procedure and automated systems control. We adopt working practice consistent with BS7799 ‘Code of Practice for Information Security Management’. Our network services are provided by Steria, a specialist IT service provider certified to TickIT quality standard.

We have the in-house capability to offer a fully on-line, integrated data management system and Internet service covering all aspects from database design, graphic design and site development through to implementation, hosting and maintenance. We have experience of maintaining and managing existing IT systems and websites inherited from previous contractors, along with designing new IT systems. As we work solely for Public Sector customers, e-GIF (e-Government Interoperability Framework) is used as a core mechanism for all IT development. Our web-enabled database tool ‘Inform’ has been developed to these standards.

9

We have a dedicated hosting provider who provides a secure, robust, monitored hosting solution located in a managed environment with dual power supply and dual Internet connections. To ensure 99.9% availability of the system, the hosting solution includes full 24*7 monitoring 365 days a year as well as:

- Intruder detection
- Bandwidth/ disk space monitoring
- Firewalls
- Virus protection
- Load balancing
- Security/ operating system patching.

We also operate and manage several Internet hubs where shared data repositories are available to both customers and staff. These data repositories are hosted on web servers in a demilitarised zone or moat between an inner and outer firewall with appropriate levels of password access and control.

Contacts and Networks

9

Within our partnership we are particularly proud of our relationship with key contacts and networks. We have very good relationships with key individuals within the key Executive Departments and Agencies concerned with Sustainable Development, Health and Regeneration. We are well known to Joanna Young (Head of Sustainable Development at the Scottish Executive), Craig McLaren (Head of the Centre for Regeneration at Communities Scotland), Stephen Gallagher (Head of the Innovation and Change Unit at the Health Department of the Executive), Jo Colwell (Sustainable Development Commission Manager in Scotland), Simon Pepper (Member of the First Minister’s Sustainable Development Cabinet Sub Committee), Colin Mair (Head of the Improvement Service) and many others.

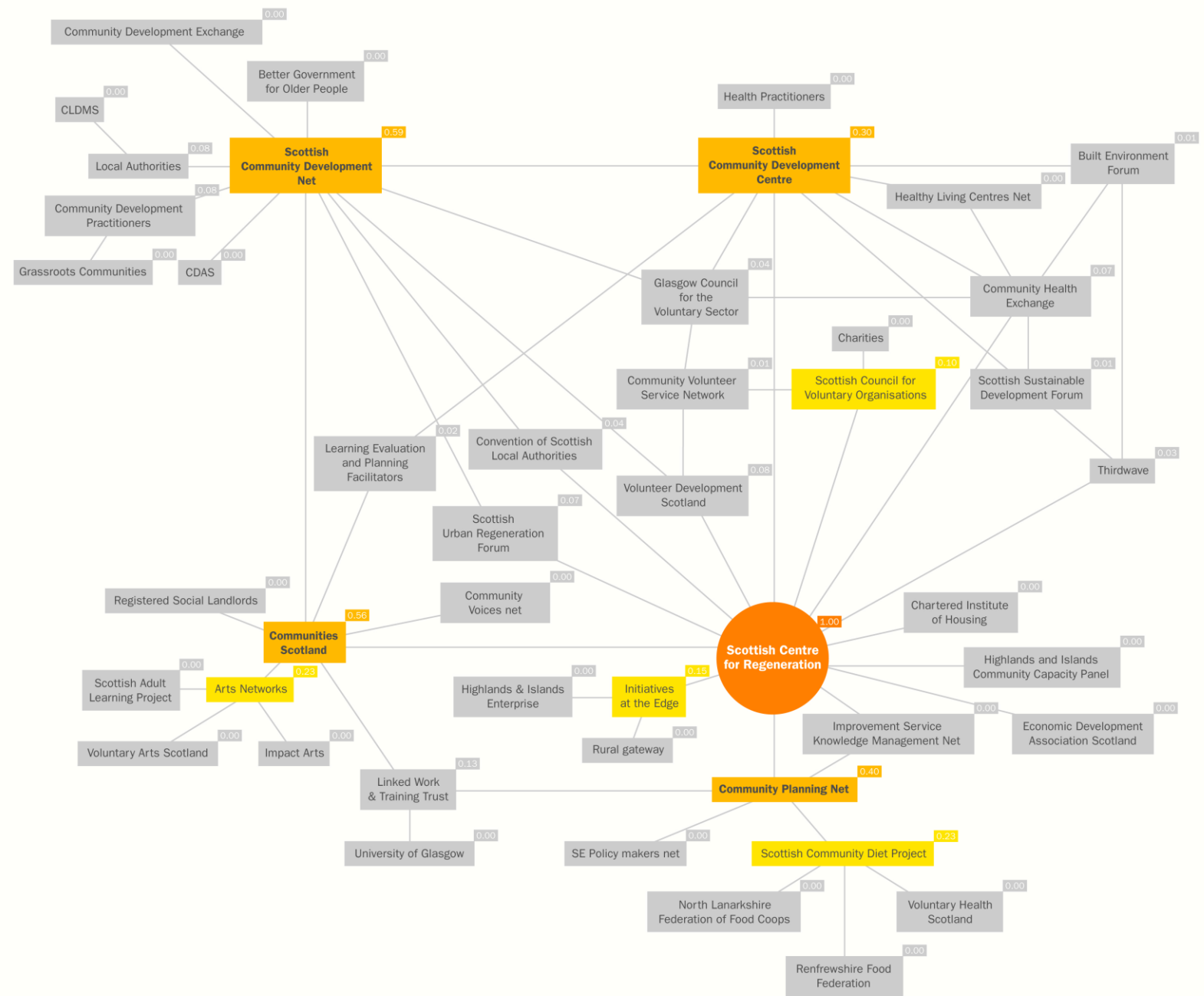
		<p>We are also well connected with the range of networks who would be helpful in promoting the Fund and generating new ideas, these include Community Planning Partnerships, Local Development Company Networks, the Community Voices Network, CLAN, the Sustainable Development Forum, the Sustainable Scotland Network, the Central Scotland Forest Trust, the Scottish Community Diet Project, the Community Recycling Network and many others.</p>
Commitment to Continuous Improvement		<p>Our systems and processes are accredited to ISO 9001 (Quality Management) and ISO 14001 (Environmental Management) and our systems follow PRINE2 methodologies. Core to these systems is continuous improvement methodology. Our annual inspection by LRQA includes a focus on both gathering evidence of performance levels and our processes to further improve our service. Improvements underway include staff training to formal PRINCE2 levels and introducing intranet-based processes to ensure we are both uniformly applying our processes and improving efficiency.</p>
Organisational accessibility	9	<p>Our project management system details the key roles of project director and project manager. Part of their role is to ensure there are clear lines of communication with a customer and that we are accessible at all times during the working day: this is important for many reasons, but will include a capacity to provide quick responses, for instance, to enable parliamentary questions to be answered. Our web-based database tool ‘Inform’ also allows customer access to real time data on projects.</p> <p>We use Teleware technology, which allows individuals to log onto our telephony system from any landline or mobile. Staff are expected to leave a daily message indicating their availability and to respond to messages as soon as practicable (ie their meeting is over). Our Helpline will be based upon the Teleware technology and will allow any member of the project team to respond to a call, ensuring staff who answer are full knowledgeable of specific GCA requirements and can quickly source the best expertise within our team to respond to detailed queries.</p>
Adding value	10	<p>Our approach to GCA will be to seek opportunities to add value wherever possible. We have already constructed a powerful delivery team, with staff in place, that brings strong networks on which we will build promotion and support activities. We have practical experience of working with community groups in urban and rural settings, an understanding of policy matters as well as an appreciation of the governance framework for UK lottery distributors.</p>
Learning		<p>We believe that learning is a key concept to underpin GCA and ensure it adds full value now and into the future. We have ideas for developing learning across different dimensions of the programme:</p> <ul style="list-style-type: none">• by collating lessons learned from evaluation and ensuring through facilitated discussion that these lessons can be incorporated for future activities• across related programmes by bringing participants together to share ideas and by using the web to actively promote ideas and good practice• with our partner Drew Mackie Associates, using workshops with games and simulations that he has devised to develop ideas and promote learning between different projects• by providing continuity of regional adviser mentoring of applications and projects, and providing periodic training/learning for the advisers.• through developing project models (best practice cases) that can be taken up by other communities across Scotland

Mapping the Regeneration Network		<p>Drew Mackie Associates are currently working with Communities Scotland to map the Scottish Regeneration Network (see following diagram). This initial draft shows the extent, scale, geographic and sectoral spread, as well as the interrelationship of organisations engaged in Community support and development. DMA have also been working with the Community Voices Network and therefore have ready access to groups who would make use of the Fund.</p>
Additional Funding	10	<p>The mapping exercise also captures the variety of funds available to support communities. These include SCARF, INCREASE, Emsee Fairburn Trust, FutureBuilders and others. We will ensure through training that our regional advisers understand the range of funding sources available for particular types of project. We will use the strength of our networks to build on our strong connections with other funders.</p> <p>Our unique knowledge in this area will significantly enhance our ability to draw extra funding and appropriate support into projects supported and initiated through the Fund.</p> <p>Furthermore, through our Partnership we have had direct experience in developing and now populating the Community WebNet site http://www.communitywebnet.org.uk with sustainable community based projects and we would use this resource to both promote the fund and match it with established community groups.</p>
A Broader Perspective		<p>As all our key partners work across the UK we are able to draw on a wider pool of initiatives and practical examples of projects that deliver sustainable communities. We all undertake work for Government Departments, agencies and other funders who have as a priority the same goals as the Fund. We would use this experience to enhance the delivery of the Fund in Scotland.</p>
Relationships with Local Authorities and Community Planning Partnerships	10	<p>Our partnership is unique in that it is the only one who has direct representation on the Sustainable Scotland Network, the leading Local Government Network for Sustainable Development. http://www.sustainable-scotland.net Through our close relationship with this Network we are able to access appropriate and relevant staff and elected members in all 32 Scottish Councils. This will allow us to quickly develop and assess local government support for Fund initiatives.</p> <p>We also have very good links to SOLACE http://www.solacescotland.org.uk and with Colin Mair the Chief Executive of the Improvement Service http://www.improvementservice.org.uk and would use these relationships to promote the FUND across the Community Planning Partnerships in Scotland.</p>

Map of Partners in Regeneration Network

Map (still under construction)
prepared from survey of working links
between organisations both within
and linked to PiR.

By Drew Mackie Associates for
Communities Scotland's Scottish
Centre for Regeneration.



1.3 HOW WE WILL ENGAGE

Stakeholder Engagement	10	<p>The success of Growing Community Assets depends on accessing the community groups who will generate the ideas to use the fund, ensuring they are supported in developing their projects both from an organisational and technical viewpoint and that project ideas are made as sustainable as possible.</p> <p>There will be a number of suitable projects already in the pipeline and given the relatively short timescale of the fund it is important that these come to the fore to establish some quick wins for the fund, and thereby providing leadership and stimulus to other community groups.</p> <p>We are exceptionally well placed to undertake these tasks – accessing groups, providing technical and community development support and highlighting early wins.</p>
Our model for support	6	<p>Our model for delivery of services to support the Growing Community Assets programme brings together those organisations and people with the knowledge, experience and contacts to provide the full range of services required. There will be a core team, a network of regional advisers and involvement of a wide range of support organisations and their networks.</p>
Momenta		<p>Momenta will provide overall programme management and will:</p> <ul style="list-style-type: none">• coordinate networks to gain access to potential partners• provide support to THE FUND promotion• handle participant enquiries• provide information to participants and reports to THE FUND• operate grant management processes• set up and manage an IT/web infrastructure and effective operating processes• ensure adviser learning and development of best practice at periodic training events.
Managing grants, using systems to facilitate service provision	2	<p>The grant management service needs to be efficient to ensure that participants get a first class service and accurate so that THE FUND can be confident that data is being recorded correctly, allowing proper accountability for funds.</p> <p>We understand that THE FUND will want to see early action and to get the funds allocated to GCA committed. This will be achieved through the interaction of several parts of our delivery model. Key to our approach is use of:</p> <ul style="list-style-type: none">• A wide network of community-based organisations to promote the scheme• A team with wide experience of advising community-based organisations to ensure advices is relevant, tailored and adds value• Our existing networks to bring forward a number of early high quality projects• Modern telephony to ensure potential and existing participants get quick responses to queries• Our proven web-based grant management tool ‘Inform’. This will allow participants to enter data on their applications and projects remotely and allow assessors and our team to view their projects and add data• Web-based reporting to allow THE FUND real time access to data• A risk-based approach during funding support decision meetings, an approach that focuses the committee’s valuable time on projects that are borderline• A risk-based approach to project support that focuses resources where they will provide added value

		<ul style="list-style-type: none">• Innovative mechanisms to both draw in potential participants and extract best practice from projects• Proven auditing processes to optimise support for projects, ensure projects are delivering against milestones, provide appropriate registers and allow proper accountability of funds
	2	<p>Momenta has extensive experience of managing grants for public sector customers. Our tailored grant management solutions have been developed to meet the needs of our customers whilst demonstrating operational efficiency and cost-effectiveness throughout the grant life-cycle. We are also committed to minimising bureaucracy by creating systems that are simple and user-friendly for applicants.</p> <p>In many programmes we manage for the Government, we are responsible for the disbursement of funds; in total we process more than £100M per annum. Through our systems we have managed over 12,000 contracts, 3,700 contractors, 38,000 invoices and a total value of live contracts of over £200M (of which two-thirds are multi-partner externally funded). We have ISO 9,001:2000 (Quality Management System), which also covers software development under the TickIt scheme, and 14,001:1996 (Environmental Management System). Our management systems are based upon the PRINCE2 methodology. Lloyds Register Quality Assurance (LRQA) inspects our systems annually and in addition the National Audit Office has inspected our financial grant management processes and systems. Our systems are flexible, ranging from use in small maritime training grants (SMarT) to significant grants to schools (SS Partnership) and Scottish communities (INCREASE).</p>
Partner organisations	7 4	<p>Short profiles of our partner organisations are provided in Section 1.2 and in greater detail in Section 3. We have discussed with these organisations the services they will provide, and have signed a Memorandum of Understanding with each.</p> <p>They will provide:</p> <ul style="list-style-type: none">• links to their contacts and networks• knowledge of community projects that are already in the pipeline and which they can help bring to an early application for GCA funding• advice to participants in their areas of expertise – for example sustainable transport, land access, sustainable design, planning, social inclusion, sustainable energy etc.• ideas and sharing of best practice across their networks, into participant organisations and within the delivery team• Implementation of learning initiatives, such as development of model business plans, use of games and other techniques to develop sharing between community groups in the same and different sectors.
Regional advisers	6	<p>Key to our support concept is a network of regionally-based advisers. Through BTCV we already have in place a network of regionally based staff, experienced in providing advice to community based projects. We will manage and supplement the network of advisers as required to provide high quality support to project applicants and participants. Further details of advisers are provided in Section 3.</p> <p>The role of the advisers will be to:</p> <ul style="list-style-type: none">• visit potential participants to discuss their project ideas and explain the GCA process• determine which project ideas are likely to meet the criteria for GCA support

			<ul style="list-style-type: none">• work with potential participants to prepare well-written applications and determine when they are ready for submission for funding• advise where more specialist help might be needed and signpost to suitable suppliers• provide on-going support to successful grant applicants at quarterly meetings, facilitating good project management and sharing learning from other projects• monitor and report progress of projects• assist with the evaluation of projects through final reports.
			<p>Generally the same adviser will stay with a project all the way from application support through to implementation support and project closure. This will enable relationships to develop and support to be given based on good understanding of the project.</p>
Support Organisations	4	7	<p>We are close to, and have spoken with a wide range of support organisations including the Scottish Community Diet Project, Communities Scotland, the Federation of Scottish Housing Associations, Greenspace Scotland, Scottish Urban Regeneration Forum, The Scottish Centre for Regeneration, Community Voices Network, Sustainable Scotland Network, Sustainable Development Forum, Scotland’s Ecological Footprint Project, Community Recycling Network, Friends of the Earth Scotland.</p> <p>All these organisations have access to community groups who would be keen to access the fund and who will use or need assets they wish to take into their ownership. We have also confirmed that these groups will work with Momenta to provide expert technical support, as required, in their particular area of operation.</p>
Promoting and developing learning amongst participants	3	9 4	<p>As projects are developed through the GCA fund there will be opportunities to develop best practice in a wide range of areas including project types, renewables projects and community facilities. There will also be learning opportunities in terms of procedures, project management, funding, etc. Sharing of this knowledge will help to enable community groups to undertake regeneration initiatives and address local needs.</p> <p>We will add value to the fund and help support communities by creating networking opportunities where participants can share this knowledge and learn from peers. The networking will be both live and virtual and take the form of:</p> <ul style="list-style-type: none">• quarterly regional meetings• an annual conference• best practice case studies for publication online• collation of “top tips” on the website• the creation of an on-line forum on the website. <p>The networking opportunities will be promoted to communities already involved with GCA and those who would like to get involved.</p> <p>The quarterly regional meetings will enable those interested in the GCA Fund to interact with one another and with the organisations in Scotland who can assist them in achieving their aims, such as Greenspace Scotland, Paths for All, etc. We will organise the events at venues near good practice exemplars in each region, thus providing a forum for learning through visiting the exemplars.</p> <p>We will encourage attendance by holding events at appropriate times in accessible locations and avoid the use of jargon and confusing language that may act as a barrier to participation.</p>

- 1

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We will work in partnership with organisations that can supply training on these topics and will use good practice case studies including those currently being developed by the Scottish Centre for Regeneration, to demonstrate “what works in regeneration from a community perspective”. We will also work to integrate topics to build greater understanding on the multi-stranded approach to sustainable regeneration.

We have a track record of designing innovative yet appropriate events – they need to be stimulating and fun while providing the proper platform for the issues under consideration. For example, in taking the Wales Spatial Plan out to eight regional events, we represented the Plan on a set of bilingual cards that were used to introduce issues for discussion, set priorities and plan local actions. In Newcastle and North Lanarkshire, we have used badge information and flags to allow the formation of communities of interest and to act as an icebreaker. In Pendle, Blackburn and Bolton we have used storytelling methods to allow organisations and communities to express their views and feeling on community cohesion and regeneration.

1.4 HOW WE WILL MANAGE INFORMATION

- Using our professional capabilities

5

We will establish professional communications channels and information management to advise and inform all stakeholders. We will use our existing helpdesk facilities, which are ready to switch on as soon as they are needed. We will provide information and retain records in a web-enabled database. This will be built using ‘Inform’, a web site building solution we have developed within Momenta. It will be operational one week after we have agreed an initial set of information and data capture fields with THE FUND.

1.4.1 OUR HELPDESK

- Handling enquiries

2

Our helpdesk will handle general enquiries from all stakeholders. It will use our established telephony and contact management systems to handle telephone enquiries regarding GCA. Our helpdesk will also manage email and postal enquiries and requests for information and support.

We will set up a memorable 0845 number; this number range offers the lowest cost solution for THE FUND. Alternatively we could offer a free call 0800 number.

We will draft welcome messages for THE FUND approval covering:

 - calls when the helpdesk is open, this will comply with data protection and other requirements
 - calls outside normal working hours, evening, weekends, bank holidays.

Our helpdesk will operate during normal working hours 9am – 5pm, Mon – Fri (not including Bank Holidays or our Christmas closure).
- Giving the right answers

We appreciate that THE FUND wants to remain the first point of contact for initial (pre-OPF) enquiries and we suggest our general enquiries number is only advertised on THE FUND material relating to the GCA applications and projects. Our objective will be to provide a focal point for dealing consistently and correctly with those initial enquiries that do come to us.
- Backing up our Regional Advisers

For communications after the OPF stage the first point of contact for applicants and project managers will be our assigned Regional Adviser. Our helpdesk will provide a back up option for applicants and project managers that need to urgent assistance and are unable to reach their Regional Adviser.

Actioning support

Our helpdesk operators will log calls on our contact management system and will be able to automatically email requests as necessary to our Regional Advisers and other technical and professional advisers. Our operators will automatically be informed when any necessary advice has been provided and when further follow up is needed such as the provision of an OPF or Application pack, via email or post.

1.4.2 WEB SITE

One stop for all information needs

Our web site will be the focus for information and records on applications and projects.

Innovating for efficiency

9 It will be developed in accordance with all Government standards. Our ‘Inform’ web site building solution enables us to rapidly build the web site using forms to create web pages and data fields for an underpinning database. Inform uses php and MySQL to provide innovative functionality including:

- user access to parts of the web site controlled by user status
- automated actioning of users by email when data input is needed.

Ensuring the right access to information

We will use the user status to control access to the web site and provide:

- a public access area providing information on the GCA scheme
- a THE FUND and Momenta secure access area, providing records and reports from the processing of OPFs through to the evaluation of supported projects
- application and Projects areas providing restricted access for each Regional Adviser to just their own application and project records; this will ensure no conflicts of interest arise from adviser access to GCA records
- community areas providing access to each community applicant and grant holder to their own records.

Ensuring actions are undertaken

Our web site will incorporate processes for the approval and allocation of tasks. For instance THE FUND will be able to action us to develop an application by a set date, and we will be able to submit an application development plan to THE FUND for approval. The web site will in effect monitor all of our activities and enable us to measure our performance against a range of KPIs. It will not allow us to forget any actions or leave them incomplete. This has proved to be a very powerful facility acting as a management tool that drives the timeliness and efficiency of activities to comply with targets.

Providing live information and reports

Through access to this web site THE FUND will be able to obtain management reports and information on an ongoing basis.

Branding and design

Our web site design will comply with the branding and image of THE FUND. It will give the users continuity of experience and immediate visual assurance that they have reached the site they were looking for.

The web site will be well structured so users can find the information they are looking for easily and quickly. There will be a logical navigation structure, a search engine and site map.

The Public area

The public access area will give information on the GCA, including:

- contact details for our helpline
- GCA grant eligibility criteria
- a link to the THE FUND web site and specifically the OPF form

- information on projects being supported (as this becomes available)
- best practice case studies – projects that THE FUND would like to encourage the replication of in other communities across Scotland.

The secure areas

The areas accessed according to user status will include:

- application development plans
- application acceptance cases
- application appraisals
- GCA Committee decisions and feedback
- project progress plans and milestones
- grant payment schedules
- evaluation reports
- management reports.

Further explanation of these areas and how they will be used are given in the following section.

1.5 HOW WE WILL MANAGE PROCESSES

Delivering a holistic solution

2

We will efficiently deliver all of the activities required in the ITT from promotion of the GCA to the sustainable exit of grant supported projects through 8 core activities:

Core Activities

- Promotion and enquiry support
- Application development and support
- Application submission
- GCA Committee decision support
- Application feedback and grant award
- Grant monitoring and review
- Evaluation and learning
- Record maintenance and reporting.

Maintaining robust audit trails

Our information management will enable us to split out the costs associated with assisting beneficiaries and grant management as required by THE FUND. All of these activities will use our helpline and our website to obtain and record information and guarantee actions are carried out. The table below summarises how these 8 core activities cover the list of services required.

Services Directly Attributable to Assisting Beneficiaries or Adding Value Strategically	Services in Pursuit of Grant Management	How the process will be managed
<ul style="list-style-type: none">• Strategic Promotion and Developing the Field• Branding	<ul style="list-style-type: none">• Enquiries Service• Enquiries Assessment and Response	1.5.1 Promotion and Enquiry Support
<ul style="list-style-type: none">• Pre-application development• Application Support• Professional and Technical Expertise	<ul style="list-style-type: none">• Distribution of Application Materials to Customers	1.5.2 Application Development and Support
<ul style="list-style-type: none">• Project Appraisal• Potential Application Review	<ul style="list-style-type: none">• Application Assessment• Application Reporting• Risk Assessment	1.5.3 Application Submission

Services Directly Attributable to Assisting Beneficiaries or Adding Value Strategically	Services in Pursuit of Grant Management	How the process will be managed
	<ul style="list-style-type: none">• Presentation of Applications to GCA Committee	1.5.4 GCA Committee Decision Support
<ul style="list-style-type: none">• Applicant Feedback	<ul style="list-style-type: none">• Applicant Feedback• Recommendations for Funding Support	1.5.5 Application Feedback and Grant Award
<ul style="list-style-type: none">• Post Application Development Support	<ul style="list-style-type: none">• Fund Management• Risk Assessment• Asset Register• Grant Management• Monitoring of Awards	1.5.6 Grant Monitoring and Review
<ul style="list-style-type: none">• Evaluation and Practice• Involvement in Wider Evaluation	<ul style="list-style-type: none">• Evaluation	1.5.7 Evaluation and Learning
<ul style="list-style-type: none">• Data Capture and Processing• Recording and Reporting• Practice Monitoring• Reporting• Communication and Accountability• Governance Function• Complaints System	<ul style="list-style-type: none">• Data Capture and Processing• Recording and Reporting• Risk Assessment• Reporting to THE FUND• Governance Function	1.5.8 Record Maintenance and Reporting Also covered in 1.5.1 to 1.5.7

1.5.1 PROMOTION AND ENQUIRY SUPPORT

Supporting THE FUND ER	<p>It is critical that sufficient numbers of potential participants become aware of THE FUND’s four schemes and particularly for this contract, Growing Community Assets. We will bring access to the stakeholder network and understanding of what activates communities to grow their assets in ways that are most beneficial to them. We are very familiar with acting in a promotion support role for Government customers and will work closely with the THE FUND ER team to assist in strategic promotion and developing the field. We understand what THE FUND primacy in media and political communications means and we will know when to obtain approval for the pro-active work we propose. We will provide professional marketing and media production experience within our core team to agree and implement promotion activities with the THE FUND ER team.</p>
2 6 7	
Agreeing our marketing plan	<p>We will undertake awareness raising outreach and marketing work across Scotland in accordance with a marketing plan that is agreed with the THE FUND ER team. We anticipate this will:</p> <ul style="list-style-type: none">• lever from the existing THE FUND ER activities and use established networks and lobbyists• maximise opportunities through our partners and stakeholder network including intermediaries• publicise success stories and achievements of projects• provide best practice case studies of schemes to raise community awareness of the potential for them• promote the GCA investment areas and the eligibility criteria.
Engaging communities	<p>We will provide full support in the production of materials and media and will work in close collaboration with the THE FUND ER team to help communities by:</p> <ul style="list-style-type: none">• developing innovative delivery mechanisms tailored to the target audience to ensure engagement to raise awareness

	<ul style="list-style-type: none">• promoting benefits rather than features in all activities to help stimulate interest• showcasing success (advice, case studies, testimonials etc.) to motivate individuals and organisations to create desire for action• enabling action through access to practical support.
Developing materials	Our preparation of materials for THE FUND ER will use our professional facilities and experts in publicity, editing, design and proof reading. We also have established suppliers for cost effective printing of materials if required.
Marketing Packs	<p>The materials we produce will be suitable for hard copy marketing packs for distribution to key community networks throughout Scotland and for use on the THE FUND or our GCA web site.</p> <p>We envisage the material will include:</p> <ul style="list-style-type: none">• an introduction to THE FUND and the GCA scheme• case study examples of other successful projects proposed, (until completed projects become available)• a guide to the support that could be provided• testimonials from key supporters• posters and adverts to inspire local communities.
Branding	We will ensure branding guidelines are followed so that Growing Community Assets becomes a well-known THE FUND product. We will work closely with THE FUND and obtain approval at an early stage for any materials destined for external use. As experienced deliverers of contracts for the public sector, we understand the application of branding on behalf of Government customers.
Enquiry Support	We will professionally respond to the enquiries that come to our helpline, or by email and post through contact details on our web site. Our service will be flexible to demand, we will be able to deal with the estimated 10% of all enquires THE FUND suggest we may expect if they come in peaks or distributed evenly.
Using established capability	We are familiar with such enquiry services from other contracts that we manage (e.g. Envirowise) and we will provide a high service standard by training several staff who will be able to answer enquiries. In this way there will always be service cover available during normal Monday to Friday 9 – 5 office hours. Telephone and email enquiries will be dealt with on the working day they are received, postal enquiries will be responded to within 2 working days.
Providing appropriate advice	Our enquiry support will provide appropriate advice to enable the strongest cases to be taken forward and those with low chances to use their valuable time on other activities. Thus at the initial enquiry stage, there will be some enquirers for whom the right advice will be to engage further (e.g. by completing an OPF) and others for whom Growing Community Assets is not appropriate. Through training of our enquiry staff we will ensure they become skilled in making these initial distinctions and, where appropriate, in pointing applicants towards more suitable areas of support.
OPF Submission	Our aim at the enquiry stage will be to ensure that suitable initial applications forms are submitted on a THE FUND Outline Proposal Form. We will encourage the submission of an OPF directly through the THE FUND single entry point. If enquirers submit their OPF to us we will forward it to THE FUND immediately as an electronic file (we will scan any paper OPFs received and send them as a PDF file).

Ensuing our advice is right

We will work closely with staff in THE FUND’s single entry point to ensure we provide consistent information and share best practices. We will also seek feedback from a random sample of users of our enquiry service, to ensure that we maintain standards and learn from any opportunities to improve.

1.5.2 APPLICATION DEVELOPMENT AND SUPPORT

Sharing information with THE FUND

237

THE FUND and Momenta users of our web site will have access to data fields for the recording of commentary on OPFs. THE FUND will be able to record their views on OPFs directly if convenient, alternatively we will record the steer THE FUND supply with approved OPFs as the start of our ‘Case Commencement’ process.

Establishing a focal point for community support

On receipt of an approved OPF we will assess the immediate application development needs and our nearest Regional Adviser will be assigned to discuss these with the primary contact in the customer organisation. Our Regional Adviser will establish the need and optimum timing for a face-to-face meeting. Discussions with the community organisation will cover initial feedback on the OPF and issues as necessary to inform the drafting of an application development plan.

Identifying the right support package

Further development of an idea to produce an application may require a range of support including:

- the identification of potential partner technical and professional advisers who could support the project and would therefore provide free advice to the applicant in exchange for a role in the project
- the provision of a best practice business model generated from a similar project already operating elsewhere in Scotland
- the provision of paid technical and professional advisers to support application development on the understanding that they would have not role in the project
- the provision of paid technical and professional advisers to participate in a feasibility study
- the provision of technical and professional advice for an independent expert appraisal where expert advice is in the project team and has contributed to the application.

Identifying the right support package

Our Regional Adviser will propose a support package by considering the initial proposal against a number of factors that are known to influence the success of projects:

- the clarity of objectives
- the quick wins for the community and the potential for continued enthusiasm
- the strength of the community and its shared vision
- the quality of leadership (perceived and actual)
- the breadth of community ownership and benefit
- the location of the project within the community
- the fit with community needs.

Planning the support

From the initial discussions our Regional Adviser will devise an application development plan for agreement with the customer organisation. This will include:

- the scope of advice needed
- the potential community consultation/engagement requirements
- the assessment of funding options needed

- the technical and professional advice required
- an initial application risk assessment
- the key targets in application development
- the key criteria for completion of an application that we should be able to recommend to the GCA committee.

Tailoring to need

Development plans will be for feasibility studies, the provision of technical support, the development of proposals, or acquisition of land or other assets. Plans will be scaled and tailored to the size of the grant involved. We envisage the need for feasibility studies will be limited to untried project ideas and established knowledge in the form of best practice case studies will be used for projects where similar examples already exist.

Our approach to the provision of professional and technical advice will be tailored to need. Our Regional Adviser will identify appropriate advisers and will establish that they have no conflicts of interest arising from a pre-existing relationship with the customer organisation and/or from offering their services within a project that might arise from an application.

Recording application development plans

Our web site will provide a secure access area containing the application development plans. THE FUND and Momenta will have access to all application development plans. For each application under development the web site will record:

- details for the initial development plan
- a diary of communications and actions undertaken
- a development plan change log
- the application risk assessment

Approving plans

THE FUND will be able to view and approve or comment on development plans directly on the web site. On receipt of THE FUND approval of a plan we will implement it, including the sub contracting of the agreed advisers. We will review and up date the development plan and the risk assessment as the application is developed. We envisage that the professional and technical advisers and applicants will also be able to access the web site data for their particular application. This will ensure they are fully aware of the progress required.

Tracking progress

Our Regional Adviser will coordinate input from the professional and technical advisers as necessary and will maintain records on the application. Progress against the development plan will be recorded on the web site in the diary for the application. All applications will include an exit strategy aimed at sustaining the project benefits after grant support has completed.

At the appropriate stage in application development we will provide the THE FUND application materials to the applicant in paper or electronic form as necessary.

1.5.3 APPLICATION SUBMISSION

Preparing the case for acceptance ...

When the application is ready for consideration by the GCA Committee our Regional Adviser will prepare an application presentation with the community organisation and a case for application acceptance. A flag on the web site will be set to action the production of an assessment report on the application by another Regional Adviser who will act as an independent ‘Appraisal Adviser’. The case for application acceptance and the assessment report will be subject to a management review by our Programme Manager before their recommendation to THE FUND.

... and providing independent appraisal

Informing the GCA Committee

2 9

Our case for application acceptance and assessment report will include key strategic details of the application as required by the GCA Committee. These details will be recorded on our web site and THE FUND will be able to approve and assign each report to a GCA Committee meeting. A summary combining the case for application acceptance, the assessment report and our Programme Manager recommendations for each application will be produced. A book containing this information on all the applications for consideration will be provide to the GCA Committee. In the front of this book a listing will rank the applications according the strength of recommendation in terms of various criteria such as:

- fit with GCA strategy
- project risks
- strength of project team
- sustainability of the project.

This approach will enable the GCA committee to consider the numerous applications that will need to be brought to each meeting.

1.5.4 GCA COMMITTEE DECISION SUPPORT

Enabling strategic decisions	2	7	<p>We envisage that all applications brought before a GCA Committee will fundamentally be suitable for acceptance. The ranked listing will allow the GCA Committee to focus on the applications that need most discussion to reach a decision on their relative merits, potential impact and strategic fit with the programme objectives.</p>
Assisting discussions and recording decisions			<p>We will attend the GCA Committee meetings to present and discuss the applications being considered. At the meetings we will record the discussions in order to draft feedback to the applicants for subsequent approval by THE FUND. If access to the Internet can be provided in the meeting room we will be able to input records directly into our web site. Alternatively we will bring a laptop to facilitate later upload of the records to the web site.</p>
Agreeing feedback			<p>Through this approach we will rapidly produce feedback reports for approval by THE FUND. On approval the feedback will be made available on the application area of the web site so the applicant can view it. The feedback will give the GCA decision and actions that need to be taken. An email will also be sent to the applicant informing them that their feedback is available on the web site. We will provide feedback in the form of letters for applicants that do not have access to email or the internet.</p> <p>When the GCA Committee discussions require further actions to make a decision we will support the applicant to see these are undertaken and the application is resubmitted to a future GCA Committee meeting.</p>

1.5.5 APPLICATION FEEDBACK AND GRANT AWARD

Supporting further development

We will follow up application feedback from GCA Committee meetings by telephoning the applicant. According to the GCA decision we will:

- In the case of unsuccessful applications:
 - o advise on other schemes that might consider their application
 - o advise on the revision of their application necessary (in this scenario we would put the application back through the application development process).

			<ul style="list-style-type: none">• In the case of successful applications:<ul style="list-style-type: none">o advise on post application development to produce a business plano advise on monitoring, review and grant payment requirementso undertake due diligence using the independent applicationo establish the provenance of co-finance and ensure this is committed.
Awarding a grant			We will transfer and input key application data required to offer a grant on to an approved application area of our web site. THE FUND will be able to access this for incorporating key application data in a formal offer for grant. We assume THE FUND will offer the grants.
	7	9	<p>We will transfer and input key application data required to offer a grant on to an approved application area of our web site. We will then draw up a formal offer letter in accordance with THE FUND terms and conditions and incorporating key application data extracted from the web site. The offer will be available on the web site for THE FUND to view and approve. On approval it will be provided to the applicant electronically where possible and in hard copy for signature. If variations to the THE FUND terms and conditions are requested by the grant holder these will be noted on the web site and brought to the attention of THE FUND. We assume THE FUND will advise on these m THE FUND and any acceptable alterations to the standard offer letter.</p> <p>When we receive a signed offer we will change the status of the application on the web site to grant awarded and we will initiate our monitoring and review activities.</p>

1.5.6 GRANT MONITORING AND REVIEW

Proactive aftercare for successful outcomes			The Regional Adviser responsible for the application will be assigned to monitor the progress of the project, providing continuity of support. Our Regional Advisers will monitor progress through proactively communicating and when appropriate meeting with grant holders and wider representation of the communities receiving grants. Our Regional Adviser activities will be targeted on stimulating continued improvement and sustainable application of the assets for maximum community benefit.
	2	3	7
Maintaining and sharing progress information			Our Regional Advisers will be responsible for maintaining progress records, and recommending (or holding) the payment of each grant instalment. Our web site will provide a schedule of grant payments anticipated and made for each grant awarded. THE FUND will have access to the progress records and will be able to run a report listing the payments that have been recommended (or rejected) at any time. This will facilitate accurate and timely grant payments. Our web site will also provide an asset register and risk log for each grant. The grant holder will have access to this information and will be able to input commentary if they wish.

1.5.7 EVALUATION AND LEARNING

Assessing the impact of investments			We envisage we will undertake evaluation of each scheme from the perspective of grant holder performance, our support, and community asset growth. Our objectives will be to: <ul style="list-style-type: none">• facilitate learning and adaptation of projects to optimise their progress• facilitate identification of the best value and sustainable projects that could be replicated across Scotland.
	10		We will agree evaluation requirements and templates with THE FUND during the mobilisation phase to ensure the metrics meet THE FUND requirements.

Agreeing the evaluation framework

We anticipate the metrics will cover aspects such as:

- For grant holder and our support performance:
 - o management quality
 - o progress against plan
 - o value derived from professional and technical support.
- For community asset growth:
 - o community application of assets
 - o community benefits
 - o return on investment
 - o progress towards sustainability.

Making use of the evaluations

Our Regional Advisers will record evaluation data for their projects on our web site and the grant holders will be able to see the evaluation of only their project. THE FUND and Momenta will be able to access all the evaluation data to see any outlier evaluations (positive or negative) and determine actions (development of best practices or remediation of poor performance). We will agree the requirements for reporting trend analysis with THE FUND during the mobilisation phase.

Supporting wider evaluations

Our evaluations will provide underpinning data to enable efficient independent evaluations and we will cooperate with these as required by THE FUND.

1.5.8 RECORD MAINTENANCE AND REPORTING

Ensuring actions and undertaken and recorded

A critical benefit of our web site solution is that it will action the relevant people to input. We will be able to review a list of the data required by the database at any time and therefore our record maintenance will be efficient and second to none.

Maintaining and sharing progress information

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Our web site will provide live reporting to THE FUND on the progress of applications and grant projects. It will enable ongoing assessment of the spend, geographical distribution of funds, and types of projects. We will collate this information into quarterly reports on our activities and the progress of GCA. Our quarterly reports will include data on our performance against an agreed set of KPIs. We will meet with THE FUND to discuss these reports and to agree strategic developments of the GCA scheme and our support. We anticipate one of the quarterly meetings will be an annual review. Our report for this will cover activities over the whole year and will report more widely on our services and the GCA achievements.

Looking ahead

Another benefit of our web site solution is that it will provide a forward view of our activities such as, the applications planned for future GCA Committee meetings, and the profile of grant spend committed. We will include this forward view in our quarterly reports.

2 Mobilisation Plans

Fully operational

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We fully recognise the importance of the initial phase of the programme. Our approach is designed to ensure that we will be fully operational in advance of the proposed timescales, and as a result we will be able to present a professional, fully up to speed and efficient service to applicants and potential applicants. We believe that achieving this professional image at the start of the programme is critical to the successful engagement with stakeholders and for securing their ongoing participation.

Our plans for the mobilisation phase for the period June to October are presented in Figure 2.1. This presents the activities associated with this phase and shows how we are able to have an initial team operational very early into the phase, and how we will build the service and how we are confident of our ability to have reached optimum operating efficiency by October.

During the mobilisation phase we will:

- immediately set up an enquiry service to provide an initial point of contact for potential GCA advisers, Community Groups and networks
- develop our web site and management information system for application and project tracking, monitoring and reporting
- immediately establish a core team of advisers from within Momenta and our partners able to meet with and to engage with initial enquiries and fully able to cover the whole of Scotland
- train and grow our team of advisers to ensure they are fully operational by September
- establish and train our team of professional advisers able to cover the advice required by applicants and able to cost effectively cover the whole of Scotland
- establish our application support team ensuring that all processes and procedures are fully in place
- provide interim emergency support and development assistance to THE FUND
- provide assistance as required.

Enquiry service

On award of contract we will immediately set up the contact point for enquiries. We appreciate that news of the GCA project will result in a number of enquiries from stakeholders. Therefore we will set up an enquiry service from day 1 to represent the GCA project during the mobilisation phase and for the duration of the Programme. This will serve as a contact point for THE FUND, Community Groups, GCA Advisers, and our partner organisations. As the level of enquiries will be relatively small initially, we will use our intelligent telephony system to set up a number that, when called, will automatically search for an available member of the GCA Team. This will ensure that the service requirement of answering every call within 5 rings during normal office hours is met.

In addition, we will set up a GCA e-mail address. We will enable this address to be accessed by all members of the GCA team, to ensure that any e-mail requests are dealt with promptly.

As the number of enquiries grows, we are able to offer THE FUND the capability to cope through our Helpline centre. This dedicated telephone Helpline service is fully equipped with the latest call management technology, and associated databases. Our Centre currently answers calls on behalf of 7 National Programmes.

Web site

Our web site will be the focus for information and records on applications and projects. We have developed similar systems for a range of Government programmes, and based upon our experience we are confident of our ability to develop and test our system significantly in advance of the operational deadlines. We will:

- produce a functional specification. This will outline the data fields to be included, it will establish the proposed page structure and highlight the required user access rights and protocols
- agree the specification of the web site with THE FUND
- build the web site application. In our experience based upon our understanding of the requirements, the build of the application will take approximately 1 week
- undertake a thorough test phase. This will involve a team of users including representative from THE FUND, our team of advisers and other stakeholders as appropriate
- provide training on the use of the system to our team, to THE FUND and to other stakeholders. This will involve a series of system demonstrations with associated guidance documentation.

As shown in Figure 2.1, our application system will be available for use significantly ahead of the date required to be fully operational. This will allow THE FUND to undertake a considered review of the application and the benefits offered. It will also allow THE FUND to make recommendations on additional functionality and to consider improvements or developments that can be incorporated in advance of the operational date.

Managing initial enquiries

We will establish a core team of advisers able to meet with and engage with initial enquiries. We are pleased to be able to offer THE FUND advisers drawn from within Momenta and from our partner organisations. Hence our adviser team is already in place, we have identified individuals with appropriate skills and experience and are able to provide cost effective coverage of the whole of Scotland.

We will bring all our advisers up to speed. For our initial core team this will involve the following:

- Clear definition of responsibilities in terms of geographical coverage.
- Training on the aims and objectives of THE FUND. We will arrange an initial briefing meeting with THE FUND for this core team of advisers. This will ensure that all of our team are fully aware of sensitivities and objectives of THE FUND and will be able to interact accordingly with applicants.
- Training of our advisers on the agreed procedures and protocols. Our team are already fully familiar with our processes and procedures. We will adapt the procedures to meet THE FUND requirements and our advisers will be brought together to ensure they are fully aware of the system requirements.
- The development of a suite of guidance documentation. We will agree with THE FUND a suite of material that will be used by the adviser team in their interactions with applicants. This material will cover
 - o sensitivities
 - o best practice from previous similar initiatives
 - o information on other complementary THE FUND programmes
 - o what to do next steps.

Hence we are able to ensure that we will have a suitably trained and qualified team in place and fully able to meet with and to engage initial organisational enquiries for GCA assistance.

Growing the team

Having established our initial team of advisers able to deal with the initial enquiries, we will grow our team to ensure that we have the capacity and the capability to be fully operational by September. We will undertake a strategic review of requirements. We will use the experience gained during the initial phase to identify the needs of THE FUND and the GCA programme. We will assess:

- the distribution of enquiries geographically, both initially and projected. We will establish adviser requirements on a regional basis.
- the nature of the type of enquiry, and hence the nature of expertise required within the adviser team
- peaks and troughs in predicted enquiries, this will enable us to build capability within our team so as we are able to deal with the predicted maximum volumes of enquiry.

Having identified the strategic requirements for advisers to deal with enquiries, we will put in place the necessary team. This will involve:

- identification and training of suitable individuals from within Momenta and our partner organisations
- submission to THE FUND of our proposed team detailing how we will meet the demand
- refinement of the make-up of our team of advisers to take account of THE FUND requirements
- all of our advisers undertaking training to ensure that they are fully up to speed with THE FUND and GCA requirements. We anticipate that we will hold briefing sessions involving THE FUND and our team.

Delivering application development support

We recognise the requirement to have in place the expertise necessary to provide professional development support to potential applicants. We will undertake a strategic review to identify the requirements for this advice. This will address:

- the technical areas likely to require support, for example on legal, planning and environmental issues
- the geographical distribution for such advice
- the likely nature of the advice required, what are the common issues and where the expertise on this topic exists
- the amount of advice required and how it can be provided. This will provide clear guidance on the role of the advisers and will establish just how far their support to applicants can go.

We will submit to THE FUND our proposed plans for the delivery of the professional advice for discussion and agreement.

We will put in place agreements with appropriate experts so as to be able to provide the required advice. These experts will be drawn from within Momenta and our partner organisations. In addition where further specialist expertise is required we will use the network of contacts in Momenta and our partners to readily identify individuals with theses required skills, and we will put in place appropriate contractual arrangements that will allow them to work with us delivering the support. We will ensure that all in this team delivering professional advice are:

- fully up to speed on the nature of the advice they are able to provide, they will have clear boundaries covering their role as advisers on GCA
- trained in other THE FUND programmes and able to signpost to other sources of advice and support as appropriate
- briefed on all sensitivities relating to THE FUND and GCA
- fully covered with the professional indemnity cover as appropriate

- covered by appropriate confidentiality that restricts their use of any information provided to them solely for the purposes of providing the professional advice
- fully monitored in the delivery of the advice. We will agree with THE FUND the most cost effective mechanisms, but we anticipate that this will include a representative from our management team accompanying the adviser for selected meetings
- aware of the requirements on them to provide a report covering each meeting and the advice provided. We anticipate that this report will be provided to the applicants, we will encourage them to sign off the report and this will ensure that we are clear that the required advice and support has been provided.

We will grow the capacity of our professional advisers in line with the requirements of the GCA and THE FUND. We anticipate that this will involve:

- strategic review of professional development support required. We will analyse the support requested over the initial phase of the programme, and in consultation with THE FUND will identify the strategic needs for the service when fully operational
- identification of experts able to provide the necessary technical and geographical coverage required
- appropriate training of the additional advisers brought in whilst building the capacity of our team
- ensuring that all the best practice identified during the initial phases is made available across the team
- building a clear THE FUND GCA team identity across all of the advisers providing support and assistance to applicants. We will arrange regional meetings of the advisers not only during this capability building phase but also throughout the delivery of the service. By building this team we will have the additional flexibility to be able to respond to changing demands, changing priorities and changes for specific individuals in the team.

Application support

By 17 July, we will have in place a fully operational system for recording all information on GCA applications, we will have a trained team of advisers able to deliver initial and professional expert advice to applicants and by the 17 July we will be able to issue, respond to and assess initial full applications.

To ensure that our team are able to deal with full applications, we will:

- develop and agree with THE FUND application management procedures. This will provide the clarity to our team on what steps have to be taken and how applications will be assessed
- agree with THE FUND the assessment criteria to be used and how they wish the assessment process to go forward. We recognise the importance of having clear auditable assessment processes
- agree processes and methods for feeding back to both successful and unsuccessful applicants. We will put in place appropriate escalation procedures able to deal with all potential issues that may arise from the assessment of applications.

We will grow our ability to manage applications by increasing the resource available, and with our team of advisers ensure that our team are appropriately trained.

We also recognise the importance of learning the lessons from the initial applications. Hence we will undertake a review of the assessment and management of applications in August and September and will further develop our procedures in line with the findings of the review. Through our ability to have the

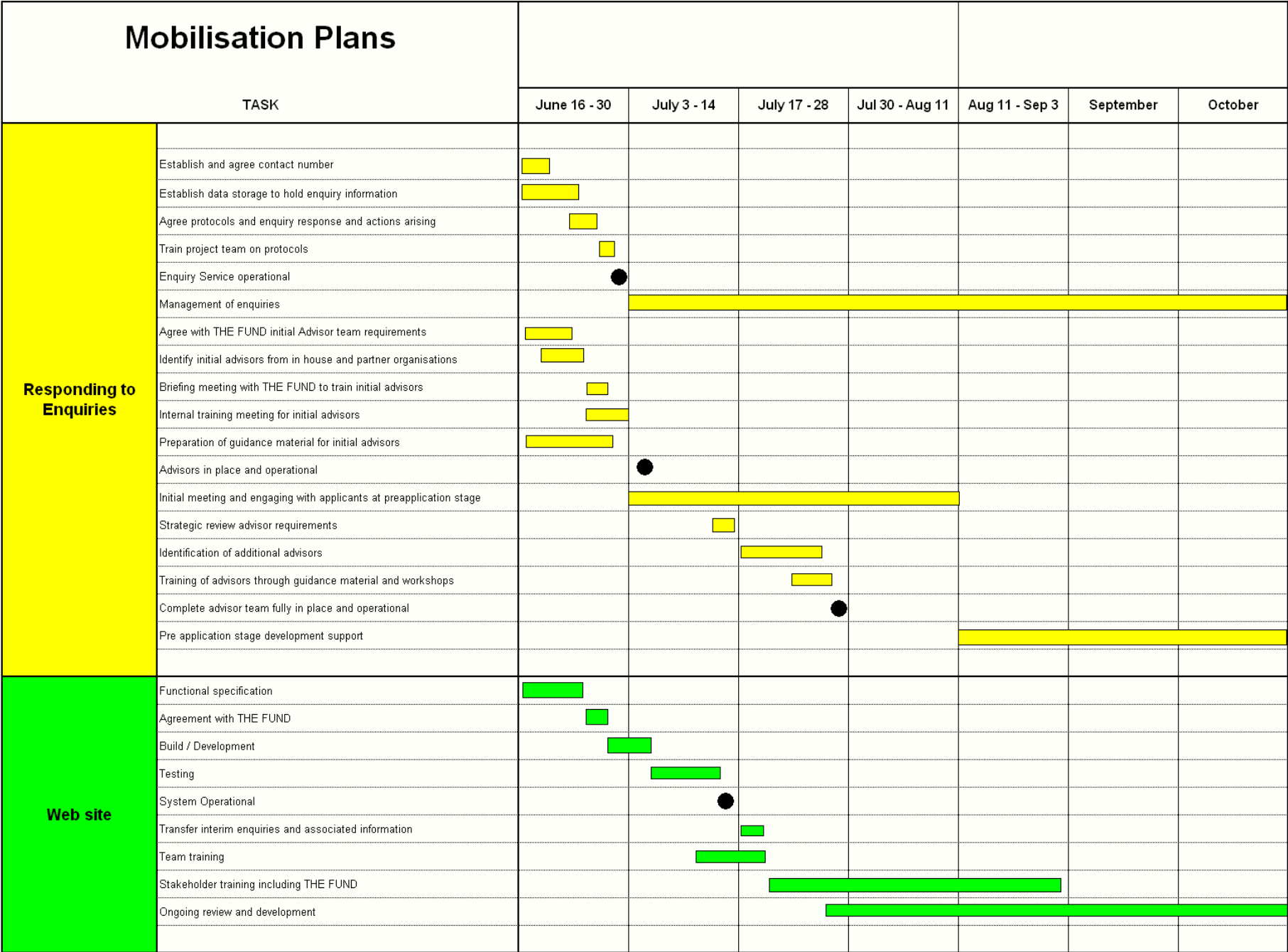
	<p>system fully operational in advance of the THE FUND timetable, we are able to incorporate further development and refinement giving confidence because the system is not only available but fully tried and tested.</p>
Emergency support	<p>Our systems will be fully operational, and our core team fully up to speed in advance of our building the capacity. Hence our team will be available and have the skills and experience to provide interim emergency support and development assistance as required. We will work closely with THE FUND to identify and agree where such assistance is required.</p> <p>Prior to 1 October, we recognise that there may be instances where support and assessment of specific applications will be required. Our team will be fully up to speed, and such emergency support will be able to be delivered. We believe that such individual instances are a very useful means of testing the programme management procedures, and the experiences gained can be very useful in the development and refinement of the processes.</p>
Promotion	<p>The initial stages of an important new initiative such as GCA will stimulate significant interest. For THE FUND it is important that:</p> <ul style="list-style-type: none">• there is a consistency in the communications regarding the aims, objectives and support available• there is a professional support available to ensure the programme is well regarded by users of the service• the communication is reaching those that THE FUND wishes to get involved• marketing activities are fully coordinated, not only in terms of the message but also in being cost effective in marketing activities. <p>We will work closely with THE FUND to develop a marketing plan for GCA that takes into account existing promotional plans, the nature of the target audience and the available marketing budget. This plan will detail the suite of proposed marketing tools, we anticipate that it will include the following:</p> <ul style="list-style-type: none">• regional workshops and events where GCA is taking its message out to the target community groups• high profile national promotion• engagement with key influencers. We recognise that by communicating to those able to influence, we will be able to extend the reach of the marketing at minimum cost to THE FUND• networking with other related initiatives so they are also able to promote GCA as appropriate. <p>We believe that a key element of the initial phase of establishing GCA will be a series of meeting with key stakeholder groups. These meetings will ensure that these groups are informed of the initiative at an early stage, that they feel they have opportunity to advise and to comment and they have a positive sense of involvement with the GCA. We will present a list of key stakeholders to THE FUND and we will undertake a series of introductory meetings with each group. We anticipate that THE FUND will attend some of these meetings.</p> <p>We will be happy to work with THE FUND in the planning and implementation of a launch event, or events for GCA.</p>

Project management

During this initial phase, we believe there are benefits from a high level of interaction between the contractor and THE FUND. We propose the following:

- an initial kick off meeting to enable clarification on the aims and objectives
- we will produce a project initiation document detailing the project plan, role and responsibilities
- the production of a monthly highlight report detailing progress against our plan, activities for the next and all necessary financial information
- a monthly meeting with THE FUND to review progress and to ensure we are continuing to deliver to the satisfaction of our customer.

Figure 2.1 Mobilisation plan



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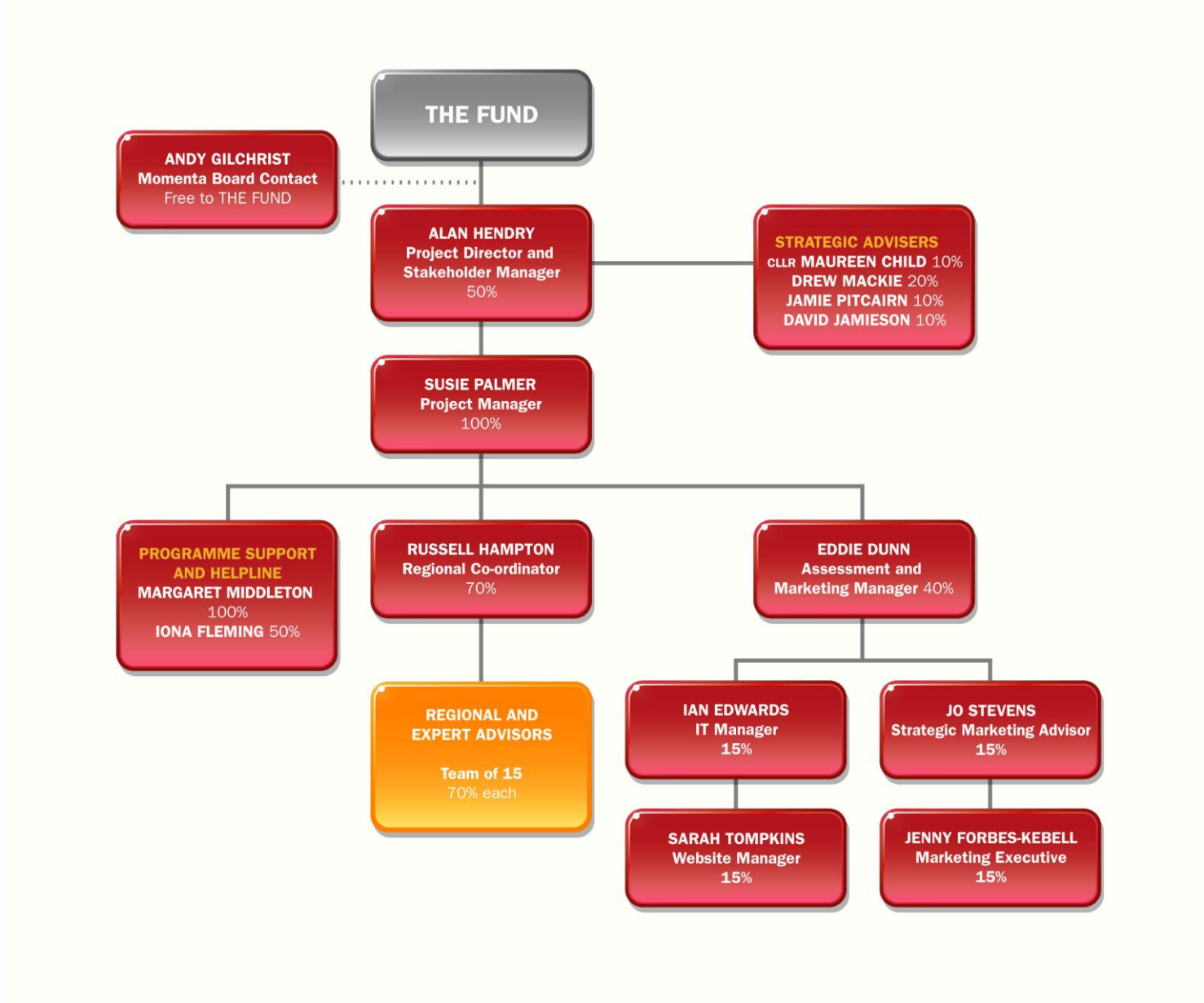
Mobilisation Plans								
TASK		June 16 - 30	July 3 - 14	July 17 - 28	Jul 30 - Aug 11	Aug 11 - Sep 3	September	October
Application Development Support	Identify professional advisor requirements	<div></div>						
	Detailed application development support plan submission and agreement with THE FUND	<div></div>						
	Contract / commission professional advisors including external and within our team		<div></div>					
	Preparation of guidance material for professional advisors		<div></div>					
	Training of professional advisors on GCA and THE FUND's objectives		<div></div>					
	Delivery of professional advice fully operational			●				
	Application support			<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Strategic review of professional advisor requirements			<div></div>	<div></div>			
	Identification / contract / training of professional advisors (as required)				<div></div>	<div></div>		
	Pre application development support fully operational					●		
Application Support	Application management system fully operational (see web site)			●				
	Development of application management procedures	<div></div>						
	Agreement of procedures with THE FUND		<div></div>					
	Identification and agreement of assessment criteria		<div></div>					
	Training team		<div></div>					
	Issue, response and assessment of full GCA applications			<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Strategic review of application management procedures				<div></div>	<div></div>		
	Development and refinement of application management procedures					<div></div>	<div></div>	
	Application management capacity fully operational						●	
	Emergency support team identified and trained	<div></div>						
	Emergency support to THE FUND as required, covering application support, post application support and decision making		<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
	Development of project monitoring guidelines			<div></div>	<div></div>			
Promotion	Targeted promotion to key potential applicants	<div></div>	<div></div>	<div></div>	<div></div>			
	Review THE FUND's promotional plans	<div></div>	<div></div>					
	Develop promotional strategy for GCA			<div></div>	<div></div>			
	Agree promotional strategy					<div></div>		
	Hold key stakeholder meetings (as required)					<div></div>	<div></div>	<div></div>
	Hold GCA launch seminars / workshops / events (as agreed in promotional plan))					<div></div>	<div></div>	<div></div>
Project Management	Initial kick off meeting with THE FUND	●						
	Project initiation document (PID)	<div></div>	<div></div>					
	Monthly progress report during mobilisation phase		<div></div>		<div></div>	<div></div>	<div></div>	<div></div>
	Monthly management meetings during mobilisation phase			●		●	●	●
	Preparation for the GCA Decision making committee					<div></div>	<div></div>	<div></div>

3 Resources and Resource Plans

3.1
Team qualities

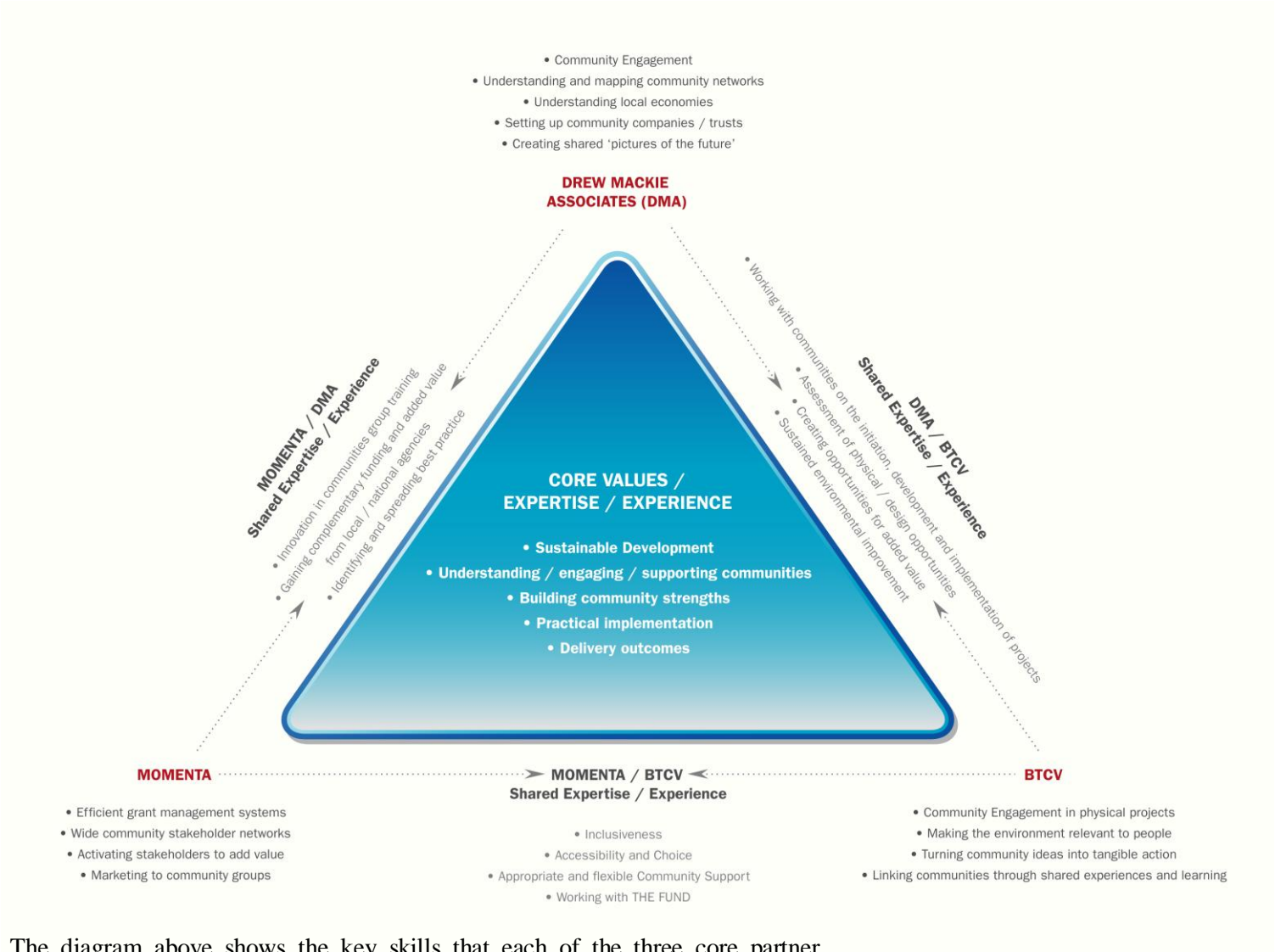
Our team is designed to provide:

- 5
- 6
- competency – the right level of experience for the jobs to be done
 - expertise – in all the disciplines required, including Grant Management, IT, information management, financial management and communications
 - dedication – a team that is devoted to the successful and cost effective delivery of the project
 - flexibility – wider resources that can be quickly brought to the programme to ensure successful delivery
 - credibility – experience of networking with all stakeholders.



Our team has two main elements. The first, led by our Project Manager, is a Delivery Team, which is dedicated to driving the programme forward. This will comprise the Helpline, the Regional Support and Assessment and Marketing functions. They will be the first point of contact for potential and actual project participants. Their work will include the main planning, co-ordination and delivery. They will also provide support to THE FUND and the GCA Selection Committee and provide local support to projects, including identifying and promoting best practice. The key members of the Delivery Team will be full time, with flexibility in the local delivery to ensure resource is where the demand is.

			<p>The second is a flexible Stakeholder Engagement and Strategic Advisors Team, led by our Project Director. This team will assist in the development of strategy and engage key stakeholder groups to assist in the delivery of the programme. These stakeholder groups will range from community groups to assist THE FUND market the GCA programme through ensuring effective best practice networking to engaging additional sources of funding to complement GCA funds.</p> <p>Our project manager will be the first point of contact for THE FUND and will be responsible for our performance. She will ensure the right resources are available to the project when they are needed and will bring in additional skills if they are required. This will ensure a flexible, effective and efficient approach to project management.</p>	
3.2	5	6	9	<p>We have 20 consultants based at Momenta’s purpose-built Glengarnock office in North Ayr who have access to 140 specialists at our Harwell base in Oxfordshire, totalling 165 staff. Of these, 5 are Executive Directors, 25 are line managers and 135 are business, marketing and/or technical consultants. We can source expertise from over 1000 staff across AEA Technology plc of which 100 are managers, 800 are consultants and the rest are support staff. We also engage a range of expert associates through a preferred supplier list. These specialists can be brought in at short notice to enhance and/or expedite project delivery, when required. This large skills base provides us with exceptionally elastic capacity to manage any workload scale from a one-person consultancy or secondment, to multi-disciplinary programme delivery.</p>
Strength in depth				
Resource Management Team				<p>To ensure all our projects run smoothly Momenta operates a dedicated Resource Management Team (RMT), which governs the allocation of resources and ensures that projects are appropriately staffed throughout the lifetime of the contract.</p> <p>Members of the RMT are experienced programme practitioners in their own right and are fully conversant with all staff experiences and capabilities.</p> <p>The RMT also has access to staff resources in AEA Technology plc’s sister divisions so that a rich pool of experience and skills is available at all times from over 1000 professional staff for relevant projects, programmes and campaigns.</p> <p>Within the information provided we highlight that:</p> <ul style="list-style-type: none">• we are highly qualified and offer a wealth of experience• we have worked for a full range of Government and Public Sector clients• we can form effective teams to deliver projects, programmes and campaigns for the Big Lottery Fund, ensuring that we have the right skills at the right time, providing a huge efficiency to THE FUND.



The diagram above shows the key skills that each of the three core partner organisations bring to the team. At heart are core values align with THE FUND’s mission. The diagram shows how our organisations bring the full range of skills required to deliver the GCA.

Experienced and professional

10

Short introductions to our team and the roles they will perform are given below. Full CVs are provided in Appendix 2. Our team will be structured as shown above to provide clear responsibilities and lines of communication and to bring all the needed expertise to our delivery of the programme. All staff listed here are key to the project. Other staff can be brought in when appropriate.

3.3, 3.4 and 3.5

Our Project Team and Personnel status:

Momena Board
Contact:
Andy Gilchrist
KEY EMPLOYEE
5%

Andy Gilchrist has over 17 years experience of successfully designing and delivering important public sector programmes to deliver policy. His experience covers implementing programmes to influence industry, SMEs, commerce, community groups and the general public.

Andy is Director of Momena’s Scottish office, which manages public sector programmes in the community, industrial, public, commercial, agricultural and transport sectors. He specialises in stakeholder marketing that brings together a sector to work as a whole, which both adds value to public sector funds and delivers the programme outcomes. He designs innovative, flexible support mechanisms to achieve sustainable projects, mechanisms that are based upon a good business, marketing and sustainable livelihoods background.

Andy will take an active role in our delivery and provide a Momena Board-level contact should there be the need.

Project Manager:
Susie Palmer
KEY EMPLOYEE
100%

Our Project Manager is Dr Susie Palmer. Susie is an excellent Project Manager and a strong leader able to drive change through her team. She has a demonstrable track record of programme and project management, and has successfully delivered public sector programmes. Through all her work Susie has a strong understanding of the importance of ensuring value for money.

Her project management experience means that she is well placed to deliver rigorous and cost effective management of the project. Susie is a natural motivator and is recognised for her attention to detail.

Susie has extensive project management experience, working as an R&D Manager within the NHS in Scotland. Susie was responsible for managing local programmes of research (approximately 350 active projects per annum) ensuring they met with the Scottish Executive’s national policies and strategies. Key elements of this included budget management and grants management. Susie was also charged with the development of systems, policies and strategies in line with current legislation and governance frameworks. Susie developed, implemented and maintained a streamlined, integrated policy-driven research management system including the development of forms and guidance documents to facilitate project approval processes, grants management, contracts management and performance evaluation.

Within Momenta, Susie is Project Manager for the INCREASE Programme in Scotland. Susie is responsible for the day-to-day management of the Programme.

She will have overall responsibility for delivery of the approved business plan and will:

- Provide a day to day point of contact for THE FUND and the Steering Committee
- Agree and further development the Business Plan
- Ensure delivery of the agreed Business Plan
- Ensure our performance matches or exceeds agreed KPIs
- Be responsible for the overall quality and delivery of all aspects of the Programme
- Be responsible for reporting to THE FUND
- Represent Momenta at meetings
- Ensure customer satisfaction with all deliverables

Susie will be the Project Manager, supported by Project Director, Alan Hendry. She will be the first point of contact for THE FUND.

Project Director:
Alan Hendry
KEY EMPLOYEE
40%

Our Project Director is Alan Hendry. He will:

- Liase with the THE FUND on strategic development of our services
- Provide strategy and operational guidance on delivery of our services to our Project Manager
- Ensure the development of our resources as necessary to address emerging requirements

Alan has over 17 years experience of working in Local Government within the UK and is currently Programme Development Manager for Momenta in Scotland. Alan is also the Scotland Manager for the Envirowise Programme and the Scottish Regional Development Manager for Knowledge Transfer Partnerships. He is active in sustainable development and is currently a Steering Group Member and former Vice Chair of the Sustainable Scotland Network.

Alan has a wealth of expertise on developing integrated solutions to sustainable development issues and effecting behaviour change in large organisations, and has a wide range of contacts with both the public and private sector in Scotland.

Assessment and
Marketing Manager:
Eddie Dunn
KEY EMPLOYEE
40%

As Project Director, Alan will take the lead on stakeholder engagement. He will utilise his wide network of contacts to strategically promote the fund to organisations and agencies whose networks will access potential applicants to THE FUND.

Eddie Dunn is based in Momenta’s Scotland office and has more than six years marketing experience in strategic communication planning, media relations and project management. He has extensive experience of working in partnerships between business, government and NGOs across a range of sectors including the environment.

As Applications and Marketing Manager for the INCREASE Programme in Scotland, Eddie is responsible for the day-to-day information management of the Programme and the production and delivery of the marketing plan for 2006 to 2008.

In 2005/2006, Eddie was the SAFED Scotland Marketing Manager in 2005 responsible for delivering the marketing activities to time and budget. In 2004/2005, Eddie managed the Marketing activity for the Travel Plan and Freight element of the TransportEnergy BestPractice programme (TEBP). This work involved the production and promotion of TEBP literature including case studies, good practice guides and publications including ‘Travel Plan News’ and ‘Freight Futures’. Eddie fostered close working relationships with key Government bodies including EST and DfT. Eddie also conducted Freight Travel Plan Research with Transport for London (TfL).

Eddie brings experience of the media industry to Momenta. He has 4 years experience of planning & buying advertising campaigns on a national, regional and local basis for a wide range of products and services from organisations such as the Health Education Board For Scotland, Standard Life and Procter & Gamble. This work requires analytical, organisational and communication skills alongside strong negotiation and planning skills with much liaison with clients, creative agencies and media owners at all levels. He also has wider marketing experience in new product development, conducting market research / market analysis and the development of marketing plans.

Eddie will be marketing liaison between Momenta and THE FUND and will:

- Work with THE FUND to promote the GCA Investment area
- Forward all enquires for general information in relation to GCA to the FUND
- Support the establishment of a high profile for GCA and its funded activities
- Respond to media and political enquiries promptly and efficiently
- Inform THE FUND of all media and political enquiries and support THE FUND in the response THE FUND deems appropriate
- Ensure that the all media and marketing materials or publications are produced with regard to GCA include the FUND logo
- Support projects to ensure they have appropriate branding that acknowledges THE FUND
- Inform THE FUND of all enquiries/applications that could carry a reputational risk to THE FUND at the earliest opportunity

Eddie’s considerable experience will ensure the effective delivery of these activities to THE FUND. Eddie will lead the marketing team and report to Dr Susie Palmer, Project Manager.

Strategic Marketing
Advisor:
Jo Stevens
KEY EMPLOYEE
15%

Jo is an experienced communications professional who has over nine year's experience in communications, marketing and PR. In her previous roles she gained extensive experience of crisis management, charity policy management and was previously principle spokesperson and Communications Manager for a

	<p>FTSE 250 company. Jo applies her work experience to campaigns including the DTI’s Knowledge Transfer Partnership programme, where she is responsible for all marketing and PR effort throughout Scotland, England, Wales and NI.</p> <p>Jo will work closely with the THE FUND Lottery Fund Marketing Team to ensure the programme’s marketing needs are met. She will report to Eddie Dunn, Assessment and Marketing Manager.</p>
<p>Marketing Executive: Jenny Forbes Kebell KEY EMPLOYEE 15%</p>	<p>Jenny is proficient in all areas of marketing and public relations. She has expertise in the creative development of marketing literature including newsletters, brochures and handouts, from inception to print. Jenny is also experienced in producing literature for websites and holding events.</p> <p>She has previously contributed articles to national publications and has worked as a Press and Publications Officer for an International Horse Trials.</p> <p>Jenny has an excellent ability to source relevant information and is competent in conveying complex information in simple, accessible forms. With excellent communication skills, she liases well with in-house colleagues and external organisations.</p> <p>Jenny will be the Marketing Executive and will look after all marketing involving the project, reporting to Jo Stevens, Strategic Marketing Advisor.</p>
<p>IT Manager: Ian Edwards KEY EMPLOYEE 15%</p>	<p>Ian has extensive IT experience, particularly with MS Access and MS Excel, with considerable recent experience of Access 2000 database design and development, and in the operation and optimisation of the Achiever Customer Relationship Management package. He has considerable experience of data handling and collation under quality-controlled conditions.</p> <p>Ian will oversee all IT requirements of the project, including website and database and will report to Eddie Dunn, Assessment and Marketing Manager.</p>
<p>Website Manager: Sarah Tompkins KEY EMPLOYEE 15%</p>	<p>Sarah has considerable IT experience, principally on the development, construction and maintenance of database-driven interactive web sites. Sarah has provided web development skills for the DoH National Joint Registry, DfT Gommms, DTI Envirowise Adviser Extranet, DTI Boost LPG, and DoH Sexual Health sites and is familiar with government standards for web development. Sarah specialises in content management, portal and intranet development and has significant experience of system design.</p> <p>Previous to developing external websites for Government departments, Sarah managed the IT and Telecommunications network for the Environment and Energy Helpline, Renewable Energy Helpline and the Waste Resource and Action Programme [WRAP] Helpline.</p> <p>Sarah will report to Ian Edwards, the IT Manager.</p>
<p>Project Support and Helpline: Iona Fleming KEY EMPLOYEE 100%</p>	<p>Iona has over 7 years administration experience in which she has proven to be highly motivated, well organised, and an excellent communicator. Through her various roles she has provided first class administrative management and support in such areas as personnel, customer service, accounting and project administration.</p> <p>Iona currently works as an administrator on the Envirowise project, this involves liaising with stakeholders, internal experts, external advisors and the general public. She is tasked with ensuring that all applications for site visits meet the project requirements, and then implementing and tracking the visit process from initial query to final report submission. She also carries out all statistical analysis,</p>

general administrative duties, and database maintenance. Iona also works on the SAFED Scotland programme, providing administration support to Programme Managers and Account Managers. She assists in the co-ordination of instructor and driver training for all in-house and commercial HGV operators in SAFED Programme and acts as point-of-contact for all users through the SAFED helpline. Key tasks include maintenance of spreadsheets and databases, regular reporting to managers and distribution of all certificates, ID cards and other market materials to qualified instructors and drivers.

Iona will manage the administration for the Programme. Iona will report to the Project Manager, Susie Palmer.

Project Support and Helpline:
Margaret Middleton
KEY EMPLOYEE
100%

Margaret has one year’s experience as Administrator for the INCREASE Programme, a Scottish Executive grant scheme managed by Momenta. Margaret is the first point of contact for applicants and is responsible for implementing procedures, and managing all administration for the Programme. Her role involves database maintenance, helpline management, procedure development and partner organisation liaison. It also involves tracking of projects, review and application of funding endorsement. She is currently also Training Manager for SAFED Scotland (Safe and Fuel Efficient Driving Programme), co-ordinating instructor and driver training for all in-house and commercial HGV operators in SAFED Programme and the primary point-of-contact for all users.

Margaret will implement procedures and manage all administration for the Programme. Margaret will report to the Project Manager, Susie Palmer.

PARTNERS
Strategic Advisor:
Drew Mackie
Drew Mackie Associates
KEY PARTNER
20%

Drew Mackie Associates have a wide and extensive knowledge of community based regeneration initiatives including developing a strategy for regeneration with the tenants of one of Scotland’s worst housing schemes Hunter Crescent in Fairfield in Perth. Workshops led to a development strategy for which business plans were prepared; the result is a £12m project of mixed housing co-operative, private and local authority tenures, which has renovated the housing stock and revitalised the area.

Drew Mackie Associates have worked with agencies and communities in a large housing area south of Belfast, Brownlow, to establish an agreed framework for physical development; this included work on the relationship between the physical environment and the ease of policing and community control. Other examples of their work include the Twechar Regeneration Initiative, which involved revising the business plan for a key project in the regeneration programme. They were also asked by the community to assist in preparing a bid to sportScotland for funding.

David Wilcox is a facilitator, author and communications specialist who has worked for over 25 years on local and national programmes in community-based regeneration. Based on personal and professional experience he has produced toolkits and other publications about managing voluntary organisation and partnerships, and about community participation. David currently specialises in mixing different tools for engagement including face-to-face workshops, digital photography and video, different types of innovative online systems.

David has recently worked for the Department for Constitutional Affairs, helping them explore how learning networks may help civil servants better carry out public engagement programmes. The Department’s Innovation Fund has also awarded a grant to Drew Mackie and David Wilcox to develop the Engagement Game. This helps participants plan engagement processes.

Cathy McCulloch is a founder of the TASC Agency, an organisation that specialises in working with children and young people. She is also a Director of The Children’s Parliament, a Scottish-wide initiative working across communities

to enable children to engage in their communities as active citizens. The Children’s Parliament currently has 3 groups operating in Midlothian, South Ayrshire and the Western Isles. The groups comprise 20 children of mixed abilities and backgrounds who are supported by a number of local adult volunteers ‘Ambassadors for Children’.

Part of the programme introduces children to local democratic processes and in the second and third (also the final) year of the group, the children are encouraged to have direct conversations with ‘adults who matter’. This might include head teachers, local councillors and officials, MSPs – all with an emphasis on allowing children’s views to be heard without mediation by adults.

Feedback from children, teachers, parents and other community members reflect the positive regard in which the initiative is held and the additional and unique approach this is having such a positive impact on local children.

Cathy is also the leader of the Children’s EcoCity projects and has assisted DMA on a range of community projects that involve children, young people and “hard to reach” groups.

Drew, David and Cathy will liaise with the Project Director.

Strategic Advisor:
Councillor Maureen
Child
10%

Maureen Child leads on sustainability in the City of Edinburgh Council and that is now built into the title of her portfolio of responsibilities - Sustainability and Finance on the Council Executive. She chairs the strategic Edinburgh Sustainable Development Partnership, which contributes to Edinburgh's statutory community planning framework. Maureen was first elected in 1995. She has shown consistent commitment to sustainable development as the central organising principle. In 2000, she was appointed to the UK Sustainable Development Commission, chaired by Jonathon Porritt. SDC is adviser and 'critical friend' of Government on these issues. Visit the web site on www.sd-commission.gov.uk

Maureen will advise on key sustainable development issues and will use her senior networks to promote THE FUND. Maureen will liaise closely with the Project Director.

Strategic Advisor:
David Jamieson
10%

As Director of BTCV Scotland, part the UK’s largest conservation volunteering charity – BTCV, David is responsible for managing 56 staff in eleven regional offices, an annual turnover of £2.1m and a conservation volunteer base of over 7000+ volunteers per year. David is employed to oversee and manage all of BTCV’s activities in Scotland and provide strategic leadership for key BTCV functions across the UK, and often internationally.

Strategic Advisor:
Jamie Pitcairn
10%

David will provide guidance on community engagement and social inclusion and will assist in the delivery of the programme. David will liaise with the Project Director.

Jamie is a Principal Consultant with experience of managing national and regional Government programmes including BIO-WISE, INCREASE and Envirowise. His roles have seen him develop appropriate strategies, manage projects, and direct marketing activities to promote the various campaigns. Jamie manages Envirowise activities in Scotland and is responsible for the effective promotion of waste minimisation initiatives to the various industrial sectors including engineering, electronics and food & Drink etc. In addition, these roles are backed up by experience of strategy development and implementation, project finance, event management and marketing.

Jamie will provide guidance and support to the Project Director, bringing in his experience of other grant management programmes. Jamie will liaise with the Project Director.

Regional Co-ordinator: Russell Hampton
70%

Russell Hampton is Deputy Director of BTCV and has been actively developing the organisation’s on-going response to the relationship between the environment and social inclusion and the role of volunteering. In addition to managing the day-to-day delivery of volunteering operations across Scotland.

Russell will manage the Regional Advisors to ensure a co-ordinated approach to project development and delivery.

Russell will report to Susie Palmer, Project Manager.

Team of Regional Advisors:
Approx 16 @ 70% each

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BTCV will provide a team of local Regional Advisors. BTCV has offices in Stirling (HQ), Edinburgh, Broxburn, Falkirk, Coatbridge, Glasgow, Ayr, Dumfries, East Ayrshire, Fife, Aberdeen and Inverness. They also have a network of home workers that will ensure good geographical coverage. This team will be flexible to respond to local demands.

The team will be finalised and augmented during the mobilisation phase; typical advisers are:

Graeme Anderson has over 14 years experience of facilitating community led projects. Much of his activity has been progressed through effective Community Partnership Initiatives where Community Empowerment and Partnership Co-operation remain the key tenets of success. He has a comprehensive experience and knowledge of working with Communities across Scotland. The range of projects in which he has been involved is extensive and includes rural and urban footpath construction, community woodland planting, gap site regeneration, remediation of contaminated land, church restoration, tree surgery, hard/soft landscaping, the restoration of an historical formal gardens, the construction of coastal sea defences, construction of fish passes, design and specification surveys for path networks, woodland and wetland management proposals, installation of sports facilities, building works and feasibility studies.

Catrin Hughes has over 12 years experience of the national and international voluntary sector, including all aspects of volunteer management and programme development, with three years focussed specifically on the development and delivery of conservation volunteering. Her work has focused on promoting practical conservation opportunities and effecting social change through environmental improvement initiatives for a diverse range of communities and individuals.

Romena Huq is a qualified environmental scientist with 11 years experience in the public, private and voluntary sectors. Romena has management responsibility for project development, from ideas generation to implementation and monitoring in a range of projects. Romena has experience in research, consultancy and practical work in a range of subjects including renewable energy systems, pollution control and contaminated land, environmental community development and practical conservation work. Romena is experienced in negotiating partnership arrangements and resource packaging for multi-agency projects.

The role of the Regional Advisors will be to:

- visit potential participants to discuss their project ideas and explain the GCA process
- determine which project ideas are likely to meet the criteria for GCA support
- work with potential participants to prepare well-written applications and determine when they are ready for submission for funding
- advise where more specialist help might be needed and signpost to suitable suppliers

- provide on-going support to successful grant applicants at quarterly meetings, facilitating good project management and sharing learning from other projects
- monitor and report progress of projects
- assist with the evaluation of projects through final reports.

Generally the same adviser will stay with a project all the way from application support through to implementation support and project closure. This will enable relationships to develop and support to be given based on good understanding of the project.

The Regional Advisors will report to Russell Hampton, Regional Coordinator.

3.6
Staff Turnover Ratio

Momenta’s current staff turnover is 11.2%

RECRUITMENT & RETENTION

Our organisation is committed to planning ahead in order to ensure that we have the right number of the right type of employees, in the right place at the right time. This is achieved through the use of recruitment plans, which are agreed annually and are regularly reviewed.

The organisation believes in recruiting people who have the ability or potential to meet the high standard of performance that will be expected of them. Our intention is to promote from within wherever this is appropriate. All vacancies are therefore advertised internally, and employees are encouraged to apply.

We do however recognise that there will be occasions when our present and future needs can only be met by external recruitment. A growing and vigorous organisation needs fresh people with different skill sets from time to time. External recruitment is carried out through a variety of different means including advertisements, recruitment agencies and the Internet.

We believe that by maximising the opportunities for employees to develop their careers within the organisation, we are able to retain high calibre, experienced staff. Rewarding staff through performance pay and recognition schemes, both financial and non-financial also aids staff retention.

It is our policy to conduct regular staff satisfaction surveys to enable us to identify as early as possible any issues that may affect staff motivation and morale. Our approach to performance management also gives employees regular opportunities to discuss their performance with their managers, to receive feedback and to put in place performance development plans, which will enable them to develop their career.

3.7
HR Policies and practices

Compliance with the Race Relations Act

AEA Technology Environment has incorporate d the relevant requirements of the Race Relations Act into our Equal Opportunities Policy, to align ourselves with client requirements and to reflect the importance attached to the Amendment Act as a driver for social change. At an AEA Technology Environment level there is specific training for HR staff to ensure they are aware of the Act’s requirements and can support their Business Units on implementation.

Observing the Commission for Racial Equality Code of Practice

We are committed to observing the requirements of the CRE Code of Practice in Employment and have incorporated specific actions into our Equal Opportunities Policy and our Equal Opportunities monitoring. These actions include:

- placing our Equal Opportunities Policy on our Intranet and Internet sites, and our specific recruitment site, to ensure that it is available to applicants, potential applicants and staff
- inviting our Trade Union staff and employee representatives to participate in training provided to our HR staff on the Race Relations Amendment Act and equalities best practice, to raise awareness of our application of the requirements and encourage them to challenge and support our progress on equalities
- provision of cascaded training on equalities to relevant staff
- a 3 year review cycle of all our HR policies which includes challenging the contribution they make to addressing inequality and ensuring they do not perpetuate unintentional discriminatory practices
- monitoring the stages of the recruitment process to enable us to identify whether applications from different racial groups are less likely to succeed at stages such as selection or shortlisting, so that they can be the focus of research and action
- training for all staff involved in the recruitment process to ensure they are aware of our Equal Opportunities Policy and the behaviours expected of them. This includes consideration of stereotyping and assumptions to challenge their personal perspectives and attitudes.

Our equal opportunities policy applies in full to the consultants that we employ. Failure to carry out the equal opportunities policy could result in disciplinary action.

Where the amendments to S71 of the Race Relations Act 1976 apply (also referred to as the Race Relations Amendment Act) we would comply with those requirements as they apply to the work, over and above our current Equal Opportunities Policy, which is under review. Please see Appendix 3 for our policy.

Associates are not directly employed by us so our equal opportunities policy does not directly apply to them. In contracting with them we would reflect either the customer requirements in this area (for example RRAA compliance) or, in the absence of relevant specific customer requirements, our standard requirements on equality and diversity quoted below.

EQUALITY OF TREATMENT

AEA Environment expects the employees of its contractors to be treated with respect and to have equality of opportunity at work, without discrimination on grounds of sexuality, gender, marital status, race, colour, ethnic or national origin, religion, age or disability.

STATUTORY REGULATIONS

Both Parties shall in all matters relating to the performance of the Agreement comply with all applicable Acts of Parliament and with all applicable orders, regulations and byelaws made with statutory authority by Government Departments or by local or other authorities. Each party shall bear its own costs in complying with any such Acts or orders etc as aforesaid.

The Contractor shall comply with all laws and regulations applicable in respect of the goods and services being supplied under the Agreement or more generally relating to the operations of the Contractor, including, without limitation, obligations in relation to deduction of tax (such as those arising under IR35) and in relation to employment rights of any worker or employee of the Contractor. Any and all costs associated with such compliance will be borne by the Contractor.

Health and Safety

AEA Technology plc has a company Health and Safety Policy, incorporating all staff from all business divisions (including Momenta). The organisation recognises the link between good health, safety and environmental performance with commercial success. AEA Technology has a duty of care to minimise the risks from activities to all stakeholders including employees, contractors, visitors, regulators, shareholders, landlords and others affected by the activities of the company. AEA Technology Environment holds a ROSPA Gold Award for its safety performance.

A company-wide safety improvement strategy was established in June 2000, implemented by a range of training courses, increased monitoring and the introduction of safety related Key Performance Indicators.

AEA’s health and safety management system is based on the principles of OHSAS 18001. This includes the following activities:

- a Safety, Health and Environment (SHE) team made up of qualified safety advisors supported by staff in each business unit with specific SHE responsibilities
- routine monitoring of health and safety through safety inspections of all work areas and buildings (formally at least annually with on-going monitoring on an informal basis);
- management walkabouts carried out by directors to provide visible commitment to SHE leadership
- compliance audits against internal procedures and legislative requirements carried out by internal trained auditors
- training of managers and staff in basic health and safety requirements, which includes their responsibilities to maintain safe working practices throughout their teams
- providing access at all times for all employees to advice from the SHE Team
- tools to help staff report any concerns or deficiencies including incidents and near misses and hazards
- procedure for responding to incidents that are then followed up by the responsible managers, and progress is monitored by the SHE Adviser where necessary.
- risk Assessments for all projects prior to initiation and reviewing throughout the project timescales
- regular monitoring of safety performance targets for senior managers
- benchmarking our performance against external parameters.

A key in the success of this activity is ensuring that the responsibility for safety, health and the environment starts with the Chief Executive and the AEA Technology Board and flows down into Businesses and Subsidiaries through the line management structure. In addition, training is carried out to maintain the good health, safety and welfare of all staff. This ensures SHE issues are embedded within the organisation’s culture and everyday practices.

Each Project Manager is responsible for ensuring that a safety risk assessment has been carried out for the project, the team is properly trained and equipped, and that control measures are followed. A central SHE team plays an important role in maintaining awareness of SHE issues and monitoring overall performance.

The SHE Adviser and Directors undertake site visits, to inspect safety practices on work being carried out at customer sites and to gain feedback from staff on safety issues. Our culture is to embed good SHE practice into everyday work.

	<p>Health and Safety</p> <p>AEA Technology plc has a company Health and Safety Policy, incorporating all staff from all business divisions (including Momenta). The organisation recognises the link between good health, safety and environmental performance and commercial success. We recognise that we have a duty of care to minimise the risks from our activities to all stakeholders including employees, contractors, visitors, regulators, shareholders, landlords and others affected by our activities both at head office and on customer sites.</p> <p>Ensuring the safety policy is promoted and enforced</p> <p>A company-wide safety improvement strategy was established in June 2000, implemented by a range of training courses, increased monitoring and the introduction of safety related Key Performance Indicators.</p>
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3.8
Training and
Development

TRAINING AND DEVELOPMENT POLICY

AEA Technology plc (AEAT) recognises that a key component of its competitive edge is the skills and abilities of its employees, and is therefore committed to training and developing all employees to ensure they have the skills and abilities needed for current and future business and are fully competent to carry out their duties safely and effectively. To fulfil this commitment it is AEAT policy that:

- line managers at all levels are responsible for the training and development of their staff
- employees are made aware of the training and development opportunities open to them and encouraged to take an active part in identifying their own training and development needs
- training and development activities are planned and regularly reviewed
- employees' individual training and development needs are regularly reviewed with them in the light of work needs and their own development
- on- and off-the-job training shall be provided to ensure that employees have the skills and knowledge needed for present and future business, and to help them develop in ways consistent with business needs and objectives
- objectives are set for training and development activities, and their effectiveness is evaluated and kept under regular review
- records are kept of training and development activities
- where appropriate, training and development is externally accredited and linked to external educational standards and qualifications
- management succession needs are met where appropriate by giving employees a blend of training, development and work experience to enable them to realise their full potential
- adequate resources are made available for the implementation of this policy.

3.9
CVs

Please see Appendix 2.

3.10
Accessing
project staff

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We envisage the main contact for this project to be Susie Palmer, our Project Manager. Shel is contactable during normal office hours, via telephone or email. As Project Manager, Susie will be able to deal with general project queries, as well as discuss the undertaking of a notified requirement. To ensure someone is always accessible, in Susie's absence we propose contact is made via the Assessment Manager, Eddie Dunn or via our Project Support/Helpline. Contact details for the Project Team will be made readily available to THE FUND.

3.11
Deployment
Mechanisms

Momenta, an operating division of AEA Technology plc, works solely for the public sector. We have over 30 years of public sector experience, covering the Health, Transport, Environment, Industrial, Agricultural and Education sectors. We understand the needs of all levels of the public sector, from 'peer' level through to Ministers.

We specialise in the design, management and implementation of programmes and projects for Government. We use our technical expertise and sector knowledge to ensure programmes best achieve the aims of our customers. We have the capacity and resource base to deliver both large and small projects on time, with the flexibility needed to fulfil developing objectives. We use a tailored mix of services to deliver a range of programmes that include:

- national information systems
- knowledge transfer programmes
- marketing programmes
- skills and development programmes
- best practice programmes
- behaviour change programmes
- fund management programmes
- R&D programmes
- accreditation programmes.

Each of our 165 consultants has clearly defined skill and sector specialisms. Our Resource Management Team (RMT) manages individual consultants to ensure each programme has the right skills at the right time. Furthermore, we have established a number of strategic partnerships to support aspects of our delivery, such as specialist procurement experts. This approach allows us to be flexible in meeting the needs of customers.

Our project and programme procedures are ISO9001 and ISO14001 approved. We have proven programme management systems and processes that are based upon the PRINCE2 approach. Each project is managed by a professional project manager, who is responsible for all aspects of customer delivering. As part of our customer care procedures, Momenta senior management seek feedback on all work to ensure we deliver exactly what our customers want. We seek to work in partnership with an individual customer to ensure effective delivery whether on large multi-million programmes or smaller scale projects.

3.12
Periods of Notice

Short-term peaks of activity can sometimes be met by the Programme Manager reallocating members of the project team to a more important or time critical activity. If this is not possible the Programme Manager will work with Momenta’s Deployment managers to identify individuals from within Momenta with the appropriate skills to help alleviate the short-term problem. This is usually possible by identifying individuals who are not working full time on customer projects. This ensures that other customer projects are not affected.

If the appropriate skills are not available within Momenta or will impact upon other projects the required staff will be sought from Momenta's sister organisations of Future Energy Solutions and NETCEN who have approximately 270 staff mainly programme and project managers, researchers and IT/Technology specialists.

In addition, Momenta have a number of preferred suppliers and contractors who are able to provide support at short notice in administration, IT, and marketing. In addition we have an extensive network of partner organisations providing specialist skills.

3.13
Urgent Requests

We are pleased to confirm that our partnership is familiar with the requirements of meeting urgent requests, for example providing information to answer parliamentary questions.

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We will provide contact information for key members of the delivery team and establish an escalation process at the initial meeting with THE FUND. The first point of contact will always be our Project Manager. Momenta’s telephone system routes through to mobile phones when staff are off-site and, if not immediately available, the second contact on the list can be called, routing through until a response is received.

4 Project and Service Management

4.1 ENSURING PROJECT DELIVERY

How we ensure
quality delivery on
time

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Delivery is achieved by a focus on agreed outcomes, delivered by experienced, trained staff with the required skills. The Programme Manager is responsible for ensuring that procedures and working instructions are applied and that an effective system is in place.

Our track record of delivering programmes of national importance to THE FUND, the Scottish Executive and the UK Government has shown us that high quality robust programme management systems are essential to assure impact and deliver value for money. Our management processes define the way we design programmes and projects to deliver the requirements of our customers.

We have developed and implemented a programme management system that follows the principles of PRINCE 2. The processes that are adopted in connection with the programme management system are:

- Project Initiation – to include development of a ‘Customer Care Plan’ to ensure customer requirements are monitored throughout delivery of the contract
- Internal Project Monitoring and Review – to target monitoring of progress made towards delivery of appointed tasks against customer requirements
- Delivery and Customer Care – to include regular progress reports and to ensure high level customer feedback is obtained as deemed necessary in the ‘Customer Care Plan’
- Invoicing and Payments – to establish and comply with the customers procedure for approval of invoices
- Project Closure – to following the detail of the handover as required within the contract.

Momenta recognises that every project is different and requires tailored tasks, resourcing, timescales and deliverables to meet the specific needs of the contract. Our team will continue to develop and apply the management system to meet the challenges of the programme.

Project management
procedures and
processes

Momenta programme and project managers follow the requirements of our in house Project Management System (PMS) which includes the following:

- formal project appointments
- project risk assessments
- project plans
- quarterly project reviews
- obtaining customer feedback

The Project Management System follows the principles of PRINCE 2 and several of our staff have formally obtained the PRINCE 2 qualification.

We are corporate members of the Association for Project Management and to ensure our project managers are aware of new developments we encourage them to become individual members of the Association for Project Management.

Software development within Momenta follows the requirements of the TickIT scheme. Our in-house project management system is equally applicable to the development of software. Our certification to the TickIT Standard is shown in Appendix 4.

	<p>Adherence with the PMS is audited through both internal and external audits. All of Momenta's systems are open to audit and regular audits are conducted by Momenta staff, LQRA, the National Audit Office and by AEA Technology's financial auditors. These formal systems help ensure that programme and project management is structured and auditable. It also helps define the lines of responsibility as all team members sign up to a set of targets that they are then responsible for delivering. Large projects or programmes are broken down into a number of smaller projects, and then tasks. The programme then becomes easier to manage. But lines of communication and responsibility remain defined, with the Programme Manager being ultimately responsible for overall delivery.</p>
Quality assurance	<p>The programme or project manager is responsible for ensuring that all Quality Assurance requirements are met. To ensure adherence with the PMS, Momenta undertake annual internal reviews on a selection of projects.</p> <p>Our internal QA representative continuously reviews systems to ensure that both business needs and QA requirements are met.</p> <p>Momenta is formally audited by Lloyds Register Quality Assurance in order to maintain its certification to ISO 9001:2000 on a twice yearly basis as part of a wider review of AEA Technology Environment.</p> <p>Our certification to Quality Management System Standard: ISO 9001:2000 is shown in Appendix 4.</p>
Financial Management systems	<p>Momenta has an extensive track record in the disbursement of Government programme funds. Managed bank accounts are typically used to disburse programme funds on behalf of Government Departments and there are a number of established mechanisms through which programme funds are requested and deposited into the bank accounts.</p> <p>Accountability is ensured through separation of the managed programme accounts and our business accounts. In addition a dedicated finance team manages the programme bank accounts on behalf of Government customers.</p> <p>Transfer of funds out of managed bank accounts requires dual consents to ensure financial probity. Our Financial Management System is regularly audited by the National Audit Office.</p>
Observe the policy and codes of practice	<p>We confirm that all personnel involved in the delivery of the scope of work will observe the policy and codes of practice set down by THE FUND.</p>
Our detailed risk assessment and management strategy	<p>We adopt a pragmatic risk management approach involving identification, mitigation, where possible, and allocation of those remaining risks to those most able to manage them.</p> <p>The Project Manager will maintain a comprehensive risk register throughout the project. The risk register will be reviewed on a quarterly basis or in response to changing circumstances. Our initial detailed risk register for the programme, based on our current knowledge, is provided in Appendix 5. We will review and update following award of the contract in conjunction with THE FUND.</p>
Ensuring performance against KPIs	<p>We will monitor and regularly review our performance against the KPIs. We will report achievements and highlight any variances that could threaten successful delivery, together with planned actions to resolve the variances.</p> <p>Our quarterly reports to THE FUND will include update on performance against the KPIs. Suggested KPIs are detailed below in Section 4.2.</p>

4.2 KEY PERFORMANCE INDICATORS

Introduction

We use contract performance standards in the form of Key Performance Indicators (KPIs) to assess performance against contractual obligations for all our projects. An initial list of Key Performance Indicators is given below but we anticipate agreeing a final list of KPIs prior to launch of the full service upon which our performance can be judged. Our performance against the agreed set of KPIs will be reported upon quarterly.

Key performance indicators

ACTIVITY TARGET	
Delivery of monthly reporting to THE FUND	Within 5 working days of the end of the month
Delivery of quarterly financial report	Within three weeks of the end of each quarter
Delivery of financial summary of the amount of budget remaining to be committed in the current financial year	At least 7 working days prior to the GCA Committee meeting
Delivery of an 'Annual Progress report' By the 30 April each year.	
Handling of complaints Any complaint received will be	forwarded to THE FUND within 4 hours of receipt during normal working hours.
Accessibility of staff The helpline will be manned between	the hours of 8.30 am and 5.00 pm Monday to Friday excluding Bank Holidays.
Availability of staff The Project Manager will attend all	GCA Committee meetings and all quarterly contract review meetings. Other staff will attend meetings as necessary.
Contribution of staff The Project Manager will present at	quarterly contract meetings the project report.
Helpline Service All calls to the Helpline will be	answered within 5 rings.
Web site Service The web site will be available for a	minimum 99.99% of the time.
Notification of application outcome to participants following GCA Committee meeting	Within 3 working days of meeting.
Issuance of Grant Offer Letter following approval by THE FUND	Within 2 weeks of approval.
Dealing with media and political enquiries	All enquiries will be passed to THE FUND within 4 hours of receiving an enquiry during normal working hours.

Management
measurables

In addition we understand that for a project such as Growing Community Assets there will be a need to measure and report on a range of management measures that give an indication that the project is achieving the strategic aims of THE FUND. Some of these measurables will be outside of our direct control but we suggest actions that we would take to ensure that the desired results are achieved.

MEASURABLE ACTION

- Geographical spread of projects Targeted marketing activities will be undertaken to increase the number of applications from under represented areas of Scotland.
- Technical spread of projects The network of technical partners will be tasked with bringing forward applications in particular areas where there is a shortage of projects.
- Number of calls to the Helpline The number of calls to the helpline will be reported upon in the monthly report. Where call numbers are more than anticipated we will bring additional resource into the helpline team to manage the additional calls.
- Success rate of applications The success rate of applications will be monitored and actions taken where necessary to increase success in a particular technical area through additional support of the adviser network.
- Commitment of funds The commitment of funds will be monitored on a quarterly basis and activities reviewed as a consequence.
- Spend of funds The spend of funds will be monitored on a quarterly basis against individual project profiles. Advisers will be tasked with ensuring that projects are progressing as projected to plan.
- Evaluation of projects Each project will be evaluated post completion by an independent assessor. We anticipate that over 80% of projects will score either excellent or good (1 or 2) out of 5.

5 Communication and Management Reporting

5.1 ENGAGING WITH THE FUND

Accountability	7	<p>Our Programme Manager, Susie Palmer, will be responsible for communications with and reporting to THE FUND. She will ensure the rest of our team communicate with THE FUND as required.</p>
Reliability	2 5	<p>Our management team will provide the strength in depth to cover for absence and ensure deadlines are met. Our systems will be robust and capable of providing information at short notice.</p>
Efficient and professional management		<p>We will seek to minimise the management time required by THE FUND. Our web site will provide total transparency for THE FUND on our activities and it will enable us and THE FUND to focus our communications and reporting on exceptional issues.</p> <p>THE FUND approvals will be requested and may be given simply through the web site ensuring efficiency for all. The web site will provide the basic data for GCA Committee meetings and THE FUND management reports.</p> <p>We will:</p> <ul style="list-style-type: none">• respond to THE FUND requests in the time it takes to generate the required information, mostly we expect the data will be readily available in our web site• submit management reports using THE FUND’s standard pro-forma documents detailing key progress points, issues and decisions or actions required• submit monthly financial reports showing spend, committed funds, distribution of funds by sector and location• recommend (or reject) grant payments when they are due• arrange quarterly operational progress meetings• arrange annual contract review meetings.
Contract review meetings		<p>We anticipate quarterly and annual meetings will be scheduled by THE FUND. We propose that these meetings are held alternately at THE FUND’s offices and at Momenta in Glengarnock, and include:</p> <ul style="list-style-type: none">• discussing overall progress to date• discussing detailed activity plans for the next period• reviewing our service volumes against budget• comparing spend commitments with budget• reviewing GCA Committee outcomes and the portfolio of projects against strategic needs• discussing changes in the strategic direction of the Programme• reviewing performance against agreed performance criteria.
Flexible reporting	9	<p>The records held on our web site will enable flexible reporting to THE FUND. In addition to our provision of quarterly and annual reports (as outlined in section 1.5.8) we will provide reports as necessary to inform THE FUND’s strategic decision making.</p>

We will provide reports on:

- monthly progress giving exceptional issues arising and actions being taken
- monthly updates of spend predictions for the rest of the financial year

5.2 ENGAGING WITH COMMUNITIES

Building competence and confidence within the communities

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Our team will be viewed by communities as very knowledgeable on how to grow their assets. Our objective will be to reach a state where communities are proactive, driving their ideas forward under our tutelage. Our Regional Advisers will be the focal point for community support from guidance on applications through to aftercare on projects. Their role will be to ensure the community leaders make the right decisions from the start and develop their assets in ways that will be broadly and sustainably supported within the community.

Our Regional Advisers will identify the needs for specialist advice and will ensure the communities obtain this advice as appropriate to optimise the cost benefit to THE FUND and to avoid any perceptions of conflicts of interest.

Keeping communities informed

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Communities will be able to access information on their applications and projects held on our web site as appropriate to keep them informed and stimulate positive activities. We anticipate communities will provide progress reports to justify grant payments. The content of these reports will be agreed with THE FUND.

We will use our awareness of the on the ground issues within communities developing applications and undertaking projects to assist the THE FUND ER team in developing suitable promotional materials.

Steering communities to the right ideas for them

1 3 4

Our team has worked with many communities throughout Scotland and elsewhere encouraging and developing their ideas from concept to fruition. The techniques we have used to help communities develop and focus their ideas are particularly innovative and include, games, story telling and scenario planning.

In other community engagement projects we have used a wide range of participatory methods to ensure that design proposals reflect the needs of local residents and business as well as being capable of delivery by public agencies. Drew Mackie Associates recently developed “the Regeneration Game” for NIACE and ODPM to allow communities and activists to explore good regeneration practice.

Understanding the issues

3 4 10

BTCV also have a vast range of experience of working with communities to develop and implement ideas. They have strong community engagement skills within all their eleven offices throughout Scotland and have good experience in both urban and rural communities. BTCV work with a vast range of groups including marginalised communities such as, black and ethnic minority groups, refugees and asylum seekers, rurally isolated communities as well as young offenders and those at risk of offending.

In addition to this BTCV Scotland supports CLAN (Community Local Action Network) a network of over 650 local groups across Scotland undertaking local environmental action.

Fifteen of BTCV’s staff are already skilled practitioners in community mentoring and will be trained to work with communities that wish to develop GCA ideas and projects.

		Additionally, Cycling Scotland, GAIA, EDAW and Paths for All have considerable community development experience and again this is throughout Scotland working in both urban and rural areas.
Additional funding and support	10	We recognise the need to also support communities to access additional funding to help support their initiatives. Within our team we have considerable knowledge of funding schemes and will assist communities to access these where appropriate, including providing a list of potential additional funding sources.

6 Price, Charges and Payment Profile

Price		Our price for delivery of the required services is summarised in the Cost Summary Schedule, at the end of Section 6.
	8	The overall price, including one-off set up is: This information has been redacted under Section 43

This information has been redacted under Section 43

:

This information has been redacted under Section 43.

7 Conflict of Interest

Eliminating Conflicts of Interest	<p>We understand that it is important that all customers to the GCA Programme receive a positive experience and feel that their application has been dealt with fairly and professionally. To achieve this, a key activity for Momenta is to ensure that there are no real or perceived conflicts of interest.</p> <p>Momenta will not be a partner in, or lead any applications to the GCA Programme. Our core business is providing professional services to public bodies, and we are not aware of any areas in which we will be involved in a GCA project.</p>
Advisers	<p>Our approach is designed to eliminate conflict issues. We will require advisers to indicate that they are not aware of any conflicts before they have access to the information in the OPF or full application. In this way, we believe we are as well positioned as is realistically possible to manage conflict issues.</p>
Potential conflicts	<p>Conflicts of interest could be an issue where:</p> <ul style="list-style-type: none">• another business unit of AEA Technology plc is involved in an application• one of our partner organisations is involved in an application.
AEA Technology	<p>It is possible that Future Energy Solutions, another operating unit within AEA Technology, will be considered as a potential organisation by community groups for carrying out feasibility studies and providing technical expertise to renewable energy projects. On receipt of either an OPF or full application involving Future Energy Solutions we will advise THE FUND so that at the GCA Committee all members are aware of the potential conflict of interest.</p>
Partner organisation	<p>There is a potential conflict of interest where one of our partner organisations is involved in a particular application. In this instance we will allocate an adviser to the application throughout the process. At full application stage, we will require the organisation to state their involvement explicitly in the project for consideration at the GCA committee meeting.</p>
No financial benefit	<p>We will ensure that a partner organisation involved in an application for support is not also able to benefit directly financially through the provision of paid advice to the project. In such cases the advice will either be provided by another organisation or ‘in kind’ advice will be provided free of charge.</p>
Organisations in more than one bid	<p>Momenta can confirm that there are no conflicts of interest between Momenta and any of its proposed partner organisations. All the partner organisations listed in Section 1 have close working relationships with Momenta and are committed to making the GCA programme a success. During the preparation of this proposal, our partner organisations have signed a Memorandum of Understanding with Momenta to ensure that they have not been included in a tender put forward by another organisation.</p>

8 Contract Transfer and Exit Strategy

Contract transfer and exit

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We fully appreciate the need that at the end of initial contract period THE FUND will assess the options for the transfer, closure or continuation of the contract. We believe that there will be projects that require ongoing project management to ensure that the project aims are achieved and therefore the most likely scenario is either for the contract to be transferred or continued by Momenta. In accordance with the requirements we have prepared four proposals for how the contract will be ended:

- proposal for closure
- proposal for future transfer to the fund
- proposal for future transfer to another contractor
- proposal for continuation or extension.

8.1 PROPOSAL FOR GCA CLOSURE

Closure will involve a number of steps to minimise the disruption of closure to the GCA Programme customers including:

- communications to stakeholder
- transfer of files to THE FUND
- provision of project profiles to THE FUND.

Communications

An important element to consider upon the decision to close the GCA Programme is how to communicate the decision to Community groups. We would work with THE FUND’s PR and External relations team to ensure that future communications with Community groups and the wider stakeholder community is consistent and accurate. Ideally a communications plan could begin at least six months before the proposed closure date.

A communications plan would need to include communications to all Community groups. For those Community groups that have been funded to undertake a project, care needs to be taken to reassure them that their grant award is safeguarded and they can continue to deliver their project for the benefit of the community. For Community Groups working towards submitting an application a clear deadline for receipt of full applications must be communicated as soon as possible to avoid wasted effort.

Coping with increased demand

We would anticipate that given the decision to close the Programme there will be a higher level of interest in the GCA Programme as community groups realise that time is running out. We would brief all our partner organisations, advisers and Helpline staff informing them of THE FUND’s decision so that in their dealings with Community Groups a consistent message is given. In addition, the web site will be updated to include a message that gives deadlines to all Community Groups who are interested in applying for advice.

Transfer paper and electronic files to THE FUND

At the time of closure we estimate there may be as many as 600 ongoing projects. In order to ensure the ongoing necessary management of these projects we will transfer all files relating to the project approval and all information relating to the monitoring and finances of the project. It is likely that this information will be a mixture of paper and electronic formats and we will provide indexed cross referenced files to THE FUND so that all information relating to completed files can be accessed.

Providing contact details following closure	To ensure that a point of contact remains for continuing projects we will continue to provide the Helpline number with a recorded message that points the caller to THE FUND for further information. This service will be provided for a year following closure. Similarly the web site will be provided for a year following closure and visitors to the web site will be signposted to THE FUND’s web site for further information.
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8.2 PROPOSAL FOR FUTURE TRANSFER TO THE FUND

Ensuring a smooth transition to THE FUND	<p>On transfer of the contract to THE FUND, we will work to ensure total continuity for the Programme up to and beyond the transfer date. Prior to the commencement of management by THE FUND of the GCA Programme we will initiate the following activities:</p> <ul style="list-style-type: none">• Host an initial information day for all THE FUND staff who are intended to work on the project. The information day will outline the current procedures and processes used by Momenta in the management of the GCA Programme.• Undertake specific training for THE FUND staff on how to access data relating to projects on the system developed by Momenta to record all aspects of the project progression.• Inform all stakeholders of the change in contact details for the GCA Programme.• Transfer the GCA web site and database to THE FUND and make necessary changes on the web site to reflect the change of management to THE FUND.• Transfer paper and electronic files pertaining to all existing projects to THE FUND.
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Point of contact Helpline service	We appreciate that news of a change of management to THE FUND will result in a number of enquiries from existing stakeholders in the GCA Programme. The existing Helpline will be briefed to inform Community Groups of the changeover following an agreement with THE FUND of the message to be conveyed.
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Keeping stakeholders informed	The transition from one contractor to another does not need to be problematic: we believe that by keeping all stakeholders informed of the changes and by having a central point of contact we will be able to minimise disruption.
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The most important stakeholders in GCA are those people currently involved in an ongoing GCA project, including those projects that have been approved and are in the process of agreeing a grant offer. For this group we will ensure that they are informed of the changeover to THE FUND as soon as possible through an electronic mailout.

We regard the GCA web site to be a key tool in the dissemination of information to the target audience and will work with THE FUND to post information on the existing web site so that projects are aware that the contact details of the GCA Programme will change.

IT transfer	The GCA web site and the GCA database are key tools required to market GCA and to manage information, respectively. We will work closely with THE FUND during the transition phase to ensure that from the transfer day the GCA web site is still available. We would sign over the web site URL used for the GCA Programme over to THE FUND.
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We will train THE FUND if necessary on how to make changes to the GCA Programme web site so they are fully trained on the administration structure of the web site for future additions or changes to the content.

We will work with THE FUND during the transition phase to ensure that the database is transferred prior to transfer date. We would anticipate that it will be necessary for us to clarify some aspects of the database and would train appropriate THE FUND staff on how to use the database.

8.3 PROPOSAL FOR FUTURE TRANSFER TO ANOTHER CONTRACTOR

Ensuring a smooth transition to another contractor	The process of transferring the Programme to another contractor will follow the same stages as outlined above for the transfer of the Programme to THE FUND. In addition, a transfer of the Programme to another contractor may involve the transfer of staff in accordance with TUPE regulations.
Transfer of staff	Momenta has experience of handling all phases of the transitional arrangements for the handover of programmes including the transfer of staff, from the position both of incoming and outgoing contractor and appreciate the complexities involved. We will work to ensure that should the transfer of staff be necessary, appropriate consultation is afforded to staff to ensure compliance with TUPE regulations. We will make contact as soon as possible after contract award to the incoming contractor to allow staff as much time as possible to discuss possible transfer with the incoming contractor.

8.4 PROPOSAL FOR CONTINUATION OR EXTENSION

Continuation or extension	Many of our contracts are extended in time following customer requests and this poses no difficulties for us. The team that we have in place would be able to continue to manage the GCA project as requested by THE FUND. We understand that projects such as the GCA project go through phases and that at the end of the 35 month initial contract activities will need to be modified to meet THE FUND’s objectives. We would be happy to quote for an extension of any period to meet THE FUND’s ongoing requirements.
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9 Legal and Contract Related

Part I	<p>Our completed Form of Tender – Part I Declaration is Page iii of our tender.</p> <p>In response to Section 15 of the Invitation to Tender, we include our notarised Declaration on Exclusion Criteria and Absence of Conflict of Interests in Appendix 6.</p> <p>Please note the items covered are not relevant to this contract or Momenta.</p>
Part II & Part III	<p>These forms are not applicable to our tender.</p>
PI Insurance	<p>Details of our Professional Indemnity cover are also included in Appendix 7.</p>
Parent Company	<p>Momenta is an operating division of AEA Technology plc. In the event of contract awarded to Momenta, a Parent Company Guarantee would not be appropriate as Momenta is not a subsidiary company.</p>
Company Registration details	<p>As Momenta is an operating division of AEA Technology, any resultant contract should be placed with AEA Technology plc.</p> <p>Our company details for the contract are AEA Technology plc, registered office 329, Harwell, Didcot, Oxon OX11 0QJ. Company registered in England and Wales No 3095862.</p>
Directors to sign contract	<p>Any contract placed with Momenta will be signed by the following 2 directors:</p> <p>Christina Cameron, Managing Director Momenta Andy Gilchrist, Director Momenta Scotland</p>

10 Assumptions and Customers Obligations

Success in committing GCA funds and providing effective aftercare service is dependent on a number of areas where THE FUND has a key role to play:

Activities necessar y for success	<ul style="list-style-type: none">• creating widespread interest in GCA• handling enquiries effectively• materials available (OPF, Application Form etc)• good numbers of outline proposal forms submitted that meet eligibility criteria• good applications being made in sufficient numbers• applications being made by a diverse range of organisations from urban and rural areas• applications being processed effectively by the awards panel• payments being made effectively within the 30 days government requirement.
THE FUND areas of prime responsibility	<p>In all these areas we have assumed that THE FUND will deliver an effective operation in their areas of prime responsibility (promotion, helpline, materials, awards panel, grants payment). We have assumed profiles of applications and projects in our pricing and these in turn rely on the effective operations of these services.</p> <p>Although THE FUND has prime responsibility in these areas, we recognise that we will be partners in many of the activities and we will do what we can to ensure effective outcomes.</p>
Risks and mitigation	<p>We have presented a risk register at Appendix 5, and this references areas such as promotion where we suggest possible mitigation steps.</p> <p>In terms of mitigation, there are a number of areas where we could potentially help further, for instance in promotion, helpline and grant payment. We have considerable experience of managing each of these areas for other programmes and we would be happy to discuss this further as appropriate. However no costs have been allowed for providing such additional assistance.</p>
Merlin	<p>We understand that THE FUND will be operating a database called Merlin. We are not reliant on this in our proposal, as we will hold data on a parallel system. The data will be exportable for incorporation into Merlin in due course; however we have not allowed any costs for data transfer (be it electronic or manual re-entry).</p>
Price assumptions	<p>Other assumptions associated with the detailed pricing are summarised in Section 6 and are not repeated here.</p>

Appendices

CONTENTS

Appendix 1 BTCV Projects Continued
Appendix 2 Curricula Vitae
Appendix 3 Equal Opportunities Policy
Appendix 4 Accreditation Certificate
Appendix 5 Risk Register
Appendix 6 Declaration on Exclusion Criteria
Appendix 7 Professional Indemnity Certificate

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Appendix 1

BTCV Projects Continued

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Momenta

Appendix 2

Curricula Vitae

CONTENTS

Andy Gilchrist	Momenta Board Contact
Alan Hendry	Project Director and Stakeholder Manager
Susie Palmer	Project Manager
Eddie Dunn	Assessment and Marketing Manager
Ian Edwards	IT Manager
Jo Stevens	Strategic Marketing Advisor
Sarah Tompkins	Website Manager
Jenny Forbes-Kebell	Marketing Executive
Margaret Middleton	Project Support and Helpline
Iona Fleming	Project Support and Helpline
Cllr Maureen Child	Strategic Adviser
Drew Mackie	Strategic Adviser
Jamie Pitcairn	Strategic Adviser
David Jamieson	Strategic Adviser
Russell Hampton	Regional Adviser
Generic	Regional Adviser

Appendix 3
Equal Opportunities & Valuing Diversity
Policy

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Appendix 4
Accreditation Certificate

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Appendix 5
Risk Register

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Appendix 6

Declaration on Exclusion Criteria and Professional Indemnity Insurance

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Momenta

Appendix 7
Professional Indemnity Insurance