

<b>Committee</b> Education Charity Sub (Education Board) Committee	<b>Dated:</b> 12th November 2018
<b>Subject</b> Grant Recommendations – City Educational Trust Fund (290840) & City of London Corporation Combined Education Charity (312836)	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>
<b>Report author:</b> Jack Joslin, Head of Central Grants Programme	

### Summary

The City of London Corporation is the sole corporate trustee of the following two small charities which operate to further education for the public benefit: the City Educational Trust Fund (290840) and the City of London Corporation Combined Education Charity (312836).

Following a review of the City Corporation's grant-making activities, the City Corporation, as charity trustee of each charity, has resolved that it is expedient and in the best interests of those small charities for their funds to be applied within the administrative framework of the City Corporation's new Central Grants Programme (CGP) which last opened to applications in March 2018. Operating within the charitable objects of each charity, a policy has been set to guide the application of those funds under an 'Education and Employment' funding theme and this Sub-committee has been given delegated authority to make grants in accordance with the agreed eligibility criteria. Those policies remain under review. **(Appendix 1A & 1B)**

The second closing date for the 'Education and Employment' theme grant applications under the Central Grants Programme for 2018 took place on 28<sup>th</sup> September 2018. These applications have been assessed and this report makes recommendations in respect of funding awards from both charities **(Appendices 2 & 3)**

### Recommendations

- To note the Central Grants Programme eligibility criteria and budget.
- To review the recommendations for grant funding from the City Educational Trust Fund at **Appendices 2** and to make funding decisions.
- To review the recommendations for the grant funding from the Combined Education Charity **Appendix 3** and to make funding decisions.

## Main Report

### Background

1. Following the corporate cross-cutting review of grant-making by the City Corporation in 2015/16, responsibility for the management of the City of London Corporation Combined Education Charity (Combined Education Charity) (312836) and the City Educational Trust Fund (290840) has been delegated to the Education Board, subject to consulting with the Community and Children's Services Committee as to any policy to be adopted for the application of each charity's funds, it being considered to be expedient and in the best interests of each charity that they be administered by the City Corporation as trustee through a centrally managed grant-making programme. The City Corporation, as trustee of each charity, in delegating the exercise of these functions also resolved that this sub-committee should be established with membership drawn from both Grand Committees and which takes grants decisions for each charity.
2. The current eligibility criteria for both charities, together with the charitable purposes of each, are provided at **Appendix 1A & 1B**. These policies remain under review to ensure that they remains effective in supporting the relevant charity's objectives.

### Central Grants Assessment Process

3. The Central Grants Unit (CGU) grant assessment process draws on City Bridge Trust's expertise in the field of charitable grant-making and demonstrates good practice in the sector. Due diligence checks are undertaken by the CGU to ensure any application recommended for approval meets the proposed funding charity's objects and complies with the agreed eligibility criteria.
4. Recommendations to this Sub-Committee are based on an assessment of how well applicants have demonstrated that their application aligns with the relevant charity's criteria, the required evidence to support the application having been provided, and a satisfactory financial assessment by the Head of Charity and Social Investment Finance in the Chamberlain's Department.
5. All individual applicants to the Combined Education Charity are requested to provide proportionate information regarding their personal circumstances to evidence need. The criteria provide that exceptional applications from individuals may be considered on provision of proof that the applicant has made determined efforts to access sufficient funds from elsewhere ("the exceptional circumstances" criteria). The information provided in support of the application is then assessed, in addition to the matters noted above, in line with the Joseph Rowntree Minimum Income Standards.<sup>1</sup>
6. The deadline for applications received under the 'Education and Employment' theme of the CGP (second funding round) was 28<sup>th</sup> September 2018. All were

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<sup>1</sup> The Minimum Income Standard for the UK shows how much money people need, so that they can buy things that members of the public think that everyone in the UK should be able to afford.

assessed by the Head of the Central Grants Programme overseeing the CGP in the six week period following the closing date. They were subsequently reviewed and approved by the Head of Charity and Social Investment Finance in the Chamberlain's Department.

7. Since the last meeting on the 17<sup>th</sup> July 2018 the CGU has worked on the reporting format for all grants outlined to the Education Charity Sub-Committee and ensured that applicants are working to establish the educational benefit of the work they are applying for. The new report format contains substantial information from the application form as it was decided by your committee that the applicants needed to demonstrate how they met the criteria of the two charities. The reports then include Officer comments, review and recommendations.

### **Education and Employment' Programme Budget**

8. The table below outlines the budget for the 'Education and Employment' programme and the grants awarded to date

Charity	Funds Available 18/19	Grants awarded to date	Funds Available
City Educational Trust	£251,359	£191,600	£59,759
Combined Education Charity	£75,635	£19,600	£56,035

9. The table below outlines the applications received, the amount of grants recommended and the balance or carry forward at the end of the year for each of the Charities.

Charity	No of Applications	Amount Requested	No Recommended	Amount Recommended	Balance
CET	3	£47,390	3	£47,300	£12,369
CEC	7	£52,310	2	£17,200	£38,835

### **Conclusion**

10. This report asks Members responsible for discharging the City Corporation's grant-making functions as charity trustee of the Combined Education Charity and the City Educational Trust Fund, to consider the funding applications which have been assessed and which are now recommended for approval.

### **Jack Joslin**

Head of Central Grants Programme

T: 020 7332 3712

E: [jack.joslin@cityoflondon.gov.uk](mailto:jack.joslin@cityoflondon.gov.uk)

## **Appendices**

Appendix 1A &1B	Eligibility Criteria – The City of London Corporation Combined Education Charity and the City Educational Trust Fund.
Appendix 2	The City Educational Trust Fund – Grant Recommendations
Appendix 3	The City of London Corporation Combined Education Charity – Grant Recommendations

## **Background Papers**

- Report and Minute of the Community and Children's Services Committee, 09 February 2018.
- Report and Minute of the Education Board, 08 March 2017.