

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Foundation for Social Improvement	
If your organisation is part of a larger organisation, what is its name? n/a	
In which London Borough is your organisation based? Westminster	
Contact person: Miss Conchita Garcia	Position: Head of Projects and Fund Development
Website: http://www.thefsi.org	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1123384
When was your organisation established? 04/01/2007	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More organisations with improved capabilities in monitoring, evaluation and impact reporting More organisations with the skills to improve their volunteer management
Please describe the purpose of your funding request in one sentence. To strengthen London's small charities in financial management, volunteer management and M&E to improve their knowledge and skills so they can better support their beneficiaries.
When will the funding be required? 29/05/2015
How much funding are you requesting? Year 1: £8,737 Year 2: £8,999 Year 3: £9,269 Total: £27,005

Aims of your organisation:

The FSI was established to support the improvement of society by providing services which will support small charities (those with an annual turnover up to £1.5 million) to gain the knowledge, skills and confidence to run themselves effectively and sustainably. The services we offer to small charities include a range of learning and awareness raising activities directed by the needs of the small charities themselves, which ensures they are the most relevant and useful for our beneficiary group. By providing these services for free they are designed to be easily accessed without prohibitive costs often associated with high quality training and events.

Main activities of your organisation:

The FSI delivers £2.2 million worth of services to small charities each year (based on the average sector-wide costs of equivalent learning activities and resources), including:

Three London training events per year delivering 15 core charity topics which range from fundraising methodologies to managing volunteers offering 300 training places per event.

Eight regional training events in cities across the UK training up to 160 charity staff members at each event on eight training topics.

An annual fundraising conference for 220 small charity attendees.

A back-office skills conference for 160 small charity participants.

Monthly one-to-one advice clinics on any topic a small charity needs support which are available face-to-face, on the phone or Skype.

Activities to raise awareness for small charities including the annual Small Charity Week campaign, which encourages support for small charities.

We support policy activity within the small charity sector through the release of research, our Small Charity Index and by facilitating the Federation for Small Charities Council.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
6	0	7	3

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	n/a space is donated as a GIK

Summary of grant request

The Need:

There are 161,266 charities in the UK (23,633 in London) and over 97% of these are small organisations, however, 78% of all funding goes to the largest 3% of charities. There is therefore often little or no capacity to develop and train staff in the practices to support them to secure more funding and run their services more effectively.

Every two years the FSI assesses skills gaps within the charities we work with and our most recent skills survey (March 2013) showed two-thirds of respondents felt a lack of funding for training and development was the main reason for their skills-gaps. The greatest skills gaps identified included impact reporting, strategic business management and planning and fundraising. The FSI's Small Charity Index also showed almost three-quarters of respondents did not have the skills to measure their social value.

How the work will be delivered:

Our 'Strengthening London's Voluntary Sector' project will deliver three training courses on 'Demonstrating Impact' and 'Managing Volunteers' each year. The courses will be run as part of the FSI's London training events which offer a suite of free high-quality and easily accessible training in 15 core topics. These events will be run three times a year offering 900 training places in total.

In addition, we will deliver an annual skills conference where a key focus is financial management with delivery of four sessions in this area by expert speakers.

Project Aims:

Increased knowledge, confidence and skills of small charities working throughout London so they can better deliver their services and support their sustainability.

Why the FSI:

Though there is much fantastic work in the London infrastructure network we continue to address a gap in provision as local infrastructure organisations don't currently provide consistent services. This means support accessed by London's small charities will depend on each region's activities. Alternative training providers charge for services which can be a barrier for smaller charities with limited resources. The FSI therefore adds value by providing small charity specific high quality free services accessible to all of London's small charities.

"Quality training with a small charity perspective is difficult to find. The FSI approach is concise, highly practical and motivating." Small Charity Training Attendee

Meeting the Trust's programme outcomes:

We will support small charities working in London to improve volunteer management and monitoring, evaluation and impact reporting via our training. Each course offers in-depth knowledge and guidance with attendees learning theory as well as accessing practical hands-on learning where they work on their real life examples. Delegates will leave with a completed workbook which will support them to implement the key learning when they return to their organisation. E.g. delegates on the 'Demonstrating your Impact' course will work on their own draft impact measurement framework.

Our programme will improve financial management skills by offering small charities access to expert speakers on a range of key finance topics during our annual conference as well as disseminating best-practice guidance in a range of our training courses.

Principles of Good Practice:

We track the benefit of our services through our comprehensive monitoring and evaluation

system which is based on the logic model. This assesses skills, confidence and knowledge directly before and after one of our events as well as after six months.

We actively seek the feedback of our beneficiaries through our biennial research which informs us of which services they need and enables us to continue to improve what we do.

Our work focuses on the needs of small charities that would not normally be able to pay for high quality training and conferences.

We share our learning by freely providing our research reports.

If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

We are ISO:9001 accredited which ensures that quality processes are embedded across the organisation.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Three training courses on 'Demonstrating Your Impact' delivered each year for three years. 60 training places will be delivered in total during the year meaning 180 training places will be delivered over three years (at least 80% will be ring fenced for London based charities).

Three training courses on 'Managing Volunteers' delivered each year for three years. 60 training places will be delivered in total during the year meaning 180 training places will be delivered over three years (at least 80% will be ring fenced for London based charities).

One back office skills conference delivered per year for three years. 120 places on financial skills workshops will be offered per year. In total 360 small charity places will be offered on financial management skills over three years (at least 80% will be ring fenced for London based charities).

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

A measurable increase in the knowledge of those accessing the programme.

A measurable increase in the skills of those accessing the programme

A measurable increase in the confidence of those accessing the programme

Improved strength of small charities in London which are better able to demonstrate their impact, manage and support their volunteers and implement stronger financial management skills.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes, depending on the support our charity beneficiaries tell us they need.

However, support required in these areas has been consistent for the past seven years, so we anticipate it will continue. To fund the work in the future we will use our earned income sources and we will apply to further trust and foundations and companies for support.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year?

240

In which Greater London borough(s) or areas of London will your beneficiaries live?

London-wide (100%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

What gender will beneficiaries be?

All

What will the ethnic grouping(s) of the beneficiaries be?

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

1-10%

Funding required for the project

What is the total cost of the proposed activity/project?

Expenditure heading	Year 1	Year 2	Year 3	Total
Training venue hire	14,400	14,832	15,277	44,509
Training equipment hire and training materials	2,140	2,204	2,270	6,614
Training catering and refreshments	7,200	7,416	7,639	22,255
Conference venue hire	2,022	2,083	2,145	6,250
Conference catering and refreshments	2,075	2,137	2,201	6,413
Conference equipment hire and materials	784	807	832	2,423
Guest speaker expenses	400	412	424	1,236
Direct staff costs	19,124	19,698	20,289	59,111
Share of operating costs	7,013	7,223	7,440	21,676
TOTAL:	55,158	56,812	58,517	170,487

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Delegate booking fees	10,600	10,600	10,600	31,800
Sponsorship	5,425	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	16,025	10,600	10,600	37,225

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
The Leathersellers Company (to be applied for)	10,000	10,000	10,000	30,000
The Westminster Foundation (to be applied for)	5,000	5,000	5,000	15,000
Further sponsorship proposals	4,500	0	0	4,500
The Donald Forrester Trust (to be applied for)	5,000	0	0	5,000
TOTAL:	24,500	15,000	15,000	54,500

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Training venue hire	1,920	1,978	2,037	5,935
Training equipment hire and training materials	285	294	303	882
Training catering and refreshments	960	988	1,019	2,967
Conference venue hire	506	521	536	1,563
Conference catering and refreshments	519	534	550	1,603
Conference equipment hire and materials	296	305	314	915
Direct staff costs	3,120	3,214	3,310	9,644
Share of operating costs	1,131	1,165	1,200	3,496
	0	0	0	0
TOTAL:	8,737	8,999	9,269	27,005

Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: June	Year: 2014
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Income received from:	£
Voluntary income	331,954
Activities for generating funds	0
Investment income	0
Income from charitable activities	46,548
Other sources	0
Total Income:	378,502

Expenditure:	£
Charitable activities	4,588
Governance costs	2,513
Cost of generating funds	1,321
Other	325,321
Total Expenditure:	333,743
Net (deficit)/surplus:	44,759
Other Recognised Gains/(Losses):	2,597
Net Movement in Funds:	44,759

Asset position at year end	£
Fixed assets	7,788
Investments	0
Net current assets	39,568
Long-term liabilities	0
*Total Assets (A):	47,356

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	47,356
*Total Reserves (B):	47,356

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
11-20%

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

None

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2012 £	2013 £	2014 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	45,087	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	2012 £	2013 £	2014 £
The Westminster Foundation	0	4,000	25,000
The Leathersellers Company	10,000	10,000	10,000
The Santander Foundation	9,600	9,825	10,000
The Coutts Charitable Trust	500	889	0
DUCK Rag	3,000	0	1,000

Declaration

I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Please confirm: Yes Full Name: **Conchita Garcia**

Role within **Head of Projects and Fund Development**
Organisation: