

Committee(s)	Dated:
Community and Children's Services Committee Education Board	14 July 2017 20 July 2017
Subject: Revised eligibility criteria for the City Educational Trust Fund and the City of London Corporation Combined Education Charity	Public
Report of: Chief Grants Officer	For Decision
Report author: Jack Joslin, Senior Grants Officer	

Summary

In accordance with its Terms of Reference, the Education Charity Sub (Education Board) Committee has reviewed the eligibility criteria for the City Educational Trust Fund (Charity Number 290840) and the City of London Corporation Combined Education Charity (Charity Number 312836) (the Charities) and recommends the revised eligibility criteria for the two Charities attached at Appendices 1 and 2 for consideration and approval. The new eligibility criteria for the Charities aim to streamline the assessment process, reduce costs of charity administration and maximise expenditure of funds to further the Charities' aims.

Recommendations

Members of the Community & Children's Services Committee are asked to:

- Consider the amended eligibility criteria for the Charities.

Members of the Education Board are asked to:

- Approve the amended eligibility criteria for the Charities; and
- Approve the dates for the next deadline of the Education & Employment theme of the Central Grants Programme.

Main Report

Background

1. The City Corporation is the sole corporate trustee of the Charities and administers each charity in accordance with its usual procedures, which involve delegating the exercise of those trustee functions to various committees (and sub-committees) of the Court of Common Council.
2. The Charities provide funding through the Education and Employment Central Grants Programme funding theme in accordance with a decision of the Policy and Resources Committee in March 2016. On 23 June 2016, the Court of Common Council agreed that the Education Board be appointed as the Grand Committee responsible for managing the Charities. Under its Terms of Reference

the Community & Children's Services Committee is also authorised to make recommendations to the Education Board on the policy to be adopted for the application of funds from the Charities and appoints some of its membership to serve on the Education Charity Sub Committee, a sub-committee of the Education Board.

3. At their July 2016 meeting the Education Board agreed that the Education Charity Sub Committee review the Charities' funding criteria and consider how it may be possible to align the activities of each charity with the City Corporation's Education Strategy which has been adopted by the Common Council. It was also agreed that any revised policy and criteria should be implemented before the 2017/2018 funding cycle.
4. The Education Charity Sub Committee has now reviewed the Charities' eligibility criteria and recommends the eligibility criteria for the two Charities attached at Appendices 1 and 2 for approval. The Education Charity Sub Committee has aimed to streamline the assessment process, reduce costs of charity administration, leverage greater grant-making impact and maximise expenditure of funds to further the Charities' aims. The Education Charity Sub Committee has supported the City Corporation's exercise of its duties as trustee of the Charities by making its recommendation in the best interests of the Charities and exercising independent judgement in doing so.

Strategic implications

5. Once new eligibility criteria is in place, it will be important to review how effectively they operate, and whether savings are being made in administration and management of the grants.
6. The criteria will be reviewed after one full round of grant-making and on a regular basis thereafter.

Conclusion

7. This report asks that Members consider and approve the recommended eligibility criteria attached at Appendices 1 and 2 for the Charities which fund the 'Education and Employment' theme of the Central Grants Programme and to approve the new 'Education and Employment' grant round to open with a deadline of 29th September 2017. The revised eligibility criteria aim to streamline the assessment process, reduce costs of charity administration and maximise expenditure of funds to further the Charities' aims.

Appendices

- Appendix 1 – Recommended eligibility criteria for the City of London Corporation Combined Education Charity
- Appendix 2 – Recommended eligibility criteria for the City Educational Trust Fund

Background Papers

- Policy and Resources Committee Report and Minutes: Implementation of Grants Review – 17 March 2016 (Item 10);
- Court of Common Council Report and Minutes: Management of the City Educational Trust Fund and the City of London Corporation Combined Education Charity – 23 June 2016 (Item 15[B]);
- Education Board Report and Minutes: Implementation of Grants Review – Education and Employment – 21 July 2016 (Item 10);
- Education Charity Sub (Education Board) Committee Report and Minutes: Development of Policy to Guide Application of Charitable Funds – City Educational Trust Fund, Combined Education Charity – 12 December 2016 (Item 6);
- Education Charity Sub (Education Board) Committee Report and Minutes: Revised eligibility criteria for the City Educational Trust Fund and the City of London Corporation Combined Education Charity – 14 February 2017 (Item 6).

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City of London Corporation Combined Education Charity (312836)

Charitable objects

The objects of the Charity are for the public benefit:

1. To further the education of persons (including persons born or resident in the City of London and those attending educational institutions in the City of London or the other London Boroughs) attending or proposing to attend secondary, further or higher educational institutions by the provision of grants or financial assistance and by arranging or supporting education and training to extend or complement courses provided by such institutions.
2. To provide grants for staff at maintained schools and Academies in the City of London and the other boroughs of London to undertake studies either at educational institutions or at other establishments provided that such study furthers their development as teachers.

The City of London Corporation Combined Education Charity is a small charity and operates by making grants. In normal years approximately £25,000 is available for distribution. Grants will be made twice a year. The charity makes grants ranging between £5,000 and £25,000 per grant as per the following criteria:

Smaller grants (of around £5,000) will need to be spent within 1 year of being awarded. Larger grants (of around £25,000) will need to be spent within 2 years of being awarded.

Eligibility

Grants will be given to organisations. Grants may also be given directly to individuals in exceptional circumstances.

Organisations include, but are not limited to, the following

- Education Charity
- Education Establishment

Beneficiaries must be (1) resident and studying at secondary, further or higher educational institutions in the City of London or London Boroughs or (2) teaching in the City of London or London Boroughs.

Grants will be primarily given to organisations, and organisations applying on behalf of individuals or groups of individuals. Applicants will need to provide proof of financial need, and to demonstrate how the grant, if awarded, will achieve the desired educational outcomes for the beneficiary/ies.

Exceptional applications from individuals may also be considered. Such applications should be supported by proof that the individual applicant is unable to access funds elsewhere.

Applications that benefit groups of individuals will be given priority over applications that benefit one individual.

Funded activities

The Charity will fund:

- Applications that deliver education in cultural arts and Science and Technology subjects to the first group of beneficiaries **or** enable the first group of beneficiaries to access education and training opportunities in cultural arts and Science and Technology subjects which extend or complement courses provided by secondary, further or higher educational institutions. This may include course costs and necessary expenses such as travel, equipment, material and maintenance costs.
- Applications for courses and study for the purposes of professional development of the second group of beneficiaries.

Application Guidelines

How do you apply for a grant?

To apply for a City of London Corporation (“CoLC”) grant, applicants need to complete an online application form by the corresponding deadline and submit this electronically with supporting documents to the Central Grants Unit. Applications should be sent to the Central Grants unit ahead of the stated deadline to allow applications to be processed in time. Only one application from an organisation or individual (in exceptional circumstances) will be considered at any one time. All application forms should be completed through the online CoLC Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

How are applications assessed?

All completed applications will be assessed by one of the CoLC’s Grant Officers. As part of this process, applicants may be contacted for more information. Receipt of applications will be acknowledged within 10 working days of it being received. Incomplete applications will be returned, and applicants will have a further 10 working days to send the missing information to the CoLC. After being assessed, applications are referred to the decision-making Committee. The timescale to process applications will vary; however, CoLC endeavours to ensure applications are assessed within 12 weeks of the closing date.

How do we monitor and evaluate grant recipients once an award has been made?

Grant recipients will be requested to complete an end of grant monitoring report to confirm how the grant has been spent and what was achieved. Please make sure receipts are kept for all the items or services bought with the grant as we may ask for them to be provided. Please keep CoLC up to date if contact details change at any stage during the period of the grant.

If your grant application is successful

Successful applicants will be sent an initial offer letter detailing the level of grant awarded. This may contain special conditions relating to the grant award or pre-agreement grant conditions. Grant acceptance terms and conditions will be subsequently issued which should be signed and returned within 20 working days. Once all documentation has been received and approved you would be asked to formally request payment of your grant award.

If your grant application is unsuccessful

Unfortunately, due to the limited budget available and the number of applications for funding we receive, the CoLC cannot provide funding to every applicant that applies for a grant and no further correspondence will be entered into in respect of unsuccessful grants. Grants are therefore awarded on a discretionary basis, there is no appeal process and the decision of the CoLC is final.

Support with your application

We urge all applicants that are unsure about whether to submit an application to read all available eligibility criteria on the CoLC website and attend one of our Grant Officer led workshops; dates for which will be publicised on our website throughout the year. If you have an enquiry that is not covered within the online guidance, please contact the Grants Unit directly, who will be able provide answers to general queries regarding the application process.

Can you reapply for funding?

Individuals who are awarded a grant from the Charity (which may be directly or through an organisation) will not be eligible for further funding within **5 (five) years** of the decision to award the grant. Organisations applying on behalf of groups, individuals and groups of individuals are not subject to this restriction, although these organisations should note that the individuals benefiting from the grant are.

Further information

If you have questions about how to apply or about the status of an application, you can contact us on 020 7332 3722, email us at grants@cityoflondon.gov.uk, or visit our website www.cityoflondon.gov.uk/centralgrantsprogramme to find out more.

City Educational Trust Fund (290840)

Charitable objects

The purposes of the charity are for the advancement of education for the public benefit by:

1. The advancement of the objects of The City University or for other educational purposes connected with or related to the University; and
2. The advancement of:
 - (i) education in science and technology, business management and commerce by the promotion of research, study, teaching and training in any of them; or
 - (ii) the study and teaching of biology and ecology; or
 - (iii) research, study and teaching in the cultural arts.

The City Educational Trust Fund is a small charity and operates by making grants. In normal years approximately £82,000 is available for distribution. Grants will be made twice a year. The charity makes grants ranging between £5,000 and £25,000 per grant as per the following criteria:

Smaller grants (of around £5,000) will need to be spent within 1 year of being awarded. Larger grants (of around £25,000) will need to be spent within 2 years of being awarded.

Eligibility

Grants will be given to organisations rather than individuals (however, please note organisations can apply on behalf of individuals, or groups of individuals).

Organisations include, but are not limited to, the following:

- Educational Charity
- Educational Establishment

Beneficiaries must be resident and studying in the City of London or London Boroughs.

Applicants will need to provide proof of financial need, and to demonstrate how the grant, if awarded, will achieve the desired educational outcomes for the beneficiary/ies.

Applications that benefit groups of individuals will be given priority over applications that benefit one individual.

Funded activities

The Charity will fund:

- Applications that advance education in the cultural arts or Science and Technology subjects. This may include course costs and necessary expenses such as travel, equipment, material and maintenance costs.

Application Guidelines

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To apply for a City of London Corporation (“CoLC”) grant, applicants need to complete an online application form by the corresponding deadline and submit this electronically with supporting documents to the Central Grants Unit. Applications should be sent to the Central Grants unit ahead of the stated deadline to allow applications to be processed in time. Only one application from an organisation or individual (in exceptional circumstances will be considered at any one time. All application forms should be completed through the online CoLC Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

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