

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: <div style="text-align: center;">Ethical Property Foundation</div>	
If your organisation is part of a larger organisation, what is its name? n/a	
In which London Borough is your organisation based? Hackney	
Contact person: Ms Antonia Swinson	Position: Chief Executive
Website: http://www.ethicalproperty.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1101812
When was your organisation established? 07/05/2003	

Grant Request

Under which of City Bridge Trust's programmes are you applying? <div style="text-align: center;">Strengthening London's Voluntary Sector</div>		
Which of the programme outcome(s) does your application aim to achieve? More organisations with improved skills in financial management More organisations with improved skills in financial management		
Please describe the purpose of your funding request in one sentence. Strengthening London's Voluntary Sector for maximum financial resilience in a time of unprecedented challenges, through quality property education, research and expert tailored advice.		
When will the funding be required? 02/10/2017		
How much funding are you requesting?		
Year 1: £49,000	Year 2: £41,000	Year 3: £44,000
Total: £134,000		

Aims of your organisation:

- ? To work for a property aware voluntary sector, where no organisation suffers reduced effectiveness due to lack of appropriate advice, knowledge and education.
- ? To work proactively for a commercial property sector driven by a triple (environmental, social and financial) rather than single financial bottom line.
- ? To continue developing with care and imagination as a sustainable, well run organisation, capable of creating lasting change.

Main activities of your organisation:

1. The Property Advice Service: advice and support to help voluntary organisations thrive for themselves and their beneficiaries. This comprises free telephone advice, written advice, site visits and paid for consultancy for larger non-profits.
2. Property Education: each year working in partnership with local community foundations, CVS and funders, we run workshops across England & Wales, centred on areas of multiple deprivation. Each year we run advice clinics where local groups source free confidential advice with property professionals.
3. Online Property Education. We offer a regularly updated 150 page library plus we have begun a new learning centre with films and webinars. A new website is planned for 2018.
4. Original research. The Charity Property Matters Survey is run every 2 years in partnership with the Charity Commission - this is a unique survey, of growing interest to sector leaders and policymakers.
5. Engaging with the property industry through the fairplace Award, our increasingly popular ethical workplace accreditation. www.fairplaceaward.com

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
1	4	6	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?
Rented	rolling 12mth licence

Summary of grant request

1. Project need and why EPF?

Ours is a unique and expert service with a consistently excellent delivery record over 11 years and a sustainable business model.

Today, London's voluntary sector risks being priced out of existence as local authorities sell charity premises onto the open market or hike up rents. There has also been a seismic shift from commercial to residential property with some industry estimates suggesting 16m sq. ft. lost office accommodation since 2008. Voluntary groups cannot compete with rent levels and increasingly need to share premises and negotiate with private landlords - requiring skills rarely developed in delivering a social mission. According to our 2016 Survey, 58% of charities find difficulty in sourcing property funding up from 41% in 2014. We have therefore been rethinking our entire approach to our London Property Advice Service: re-focussing on property education, research and 1:1 advice. We now ask clients to consider upgrading IT for hot desking and home working; evaluating if they really need premises and how to use current property creatively, e.g. through shared use.

2. How the work will be delivered

Through our property advice team (1.6FTE) comprising 2 part time senior property advisors, and an assistant property advisor with additional support from two expert volunteers, both property professionals who donate 4dpm each. Plus our 45 member Register of property professionals - solicitors and surveyors who offer pro bono or discounted advice. In addition: administrative support from the Projects & Office Coordinator. The team is managed by the Chief Executive, a former award-winning business journalist who will lead/write up the London surveys.

3. What our project will aim to achieve

Excellent value for money for City Bridge Trust, with costly expert resources employed in the most efficient way to achieve lasting benefit for London's voluntary sector.

A financially resilient voluntary sector in London with greater understanding that good property management delivers both financial sustainability and social mission.

More organisations will acquire skills in financial management including annual budgeting for premises costs, including dilapidations for leased property; managing and understanding risk.

We will increase London's voluntary sector's property knowledge and their capacity to protect their interests, preventing expensive mistakes which can lead to closure.

The London Charity Property Matters Survey 2018 & 2020. Derived from our UK study with the Charity Commission this will provide a unique picture of charities' property - of real value London funders and policymakers.

4. We meet the Trusts 'Principles of Good Practice

Though our local workshops and drop in clinics we will improve access to our services by small less well-resourced organisations by focussing on London's deprived communities. Our advice always involves best practice on accessibility and equality of opportunities. We actively refer clients to the Centre for Accessible Environment.

We use feedback to improve services through ongoing client surveys and workshop feedback. We capture learning from every case and take any urgent actions prompted by feedback as soon as possible. E.g. after recent workshop feedback, we now include more shared problem-solving.

Through client feedback, we evidence how we cascade benefits in savings made, income generated and beneficiary numbers.

We share our caseload learning with the wider sector through upgrading website learning resources and shaping our bi-annual Charity Property Matters Survey. This Survey goes to

every CVS/support organisation. Learning also informs our communication activities. E.g. our bi-monthly property column for Charity Times.

We work to reduce our carbon footprint and that of our clients. We use public transport and minimise waste, paper and energy use. We incorporate environmental best practice into our advice, promoting energy efficiency, insulation, efficient heating and environmentally-responsible product sourcing.

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? **No**

What Quality Marks does your organisation currently hold?

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.

Over 3 years we will deliver 18 London workshops, centred on communities on the Areas of Multiple Deprivation Index. We will work in partnership with local CVS, and support groups with promotion through the London Funders Forum. Topics will include Saving Money on Premises Costs and Negotiating & Managing Leases.

Over 3 years we will deliver 18 drop-in advice clinics for 60 organisations with EPF property advisers, and members of our Register - surveyors/solicitors. These will take place after the workshops, for trustees and staff to obtain free confidential advice in their own community, with pro bono follow-up offered.

Over 3 years we will deliver tailored 1:1 property advice to 300 London voluntary organisations covering every phase of the property journey and attendant financial requirements: buying, leasing, renting, moving, sharing premises, where appropriate making referrals to our Register of Property Professionals.

Over 3 years our website focus on online learning and property education to 90,000 London based visitors. These will include short films and webinars. We will use the services of our Register of Property Professionals. We will also continue to upgrade and augment our library of free templates and guidance.

In 2018 and 2020 we will produce London versions of our bi-annual Charity Property Matters Survey with the Charity Commission. With 3 surveys completed to date for England & Wales (2012/2014/2016), this is an invaluable sector resource: the only research in the UK which specifically asks non-profits about property issues.

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.

Over 3 years we will deliver property education workshops to 250 organisation based in deprived London communities. 90% will feel more confident. 90% will feel our training will save them money. Our 2017 workshops show numbers of beneficiaries average 1700 per organisation. We will therefore indirectly benefit 428000 vulnerable people.

Over 3 years we will deliver 18 drop-in clinics for 60 organisations, offering free confidential legal or property management saving £15,000 in fees plus follow up support.

Over 3 years we will deliver tailored advice to 300 London-based organisations, indirectly benefiting 510000 vulnerable Londoners. We will refer 120 of these organisations to our Register of property professionals for further legal or management advice. In total this will save at least £105000 in professional fees and save/generate £270000.

Over 3 years we will expand our online property education resources to include short films and webinars in a dedicated Learning Zone. We estimate around 30000 London visitors a year will register to use these.

We will produce a London version of our bi-annual Charity Property Matters Survey run in partnership with the Charity Commission in 2018 & 2020. This will reveal the key property trends and challenges facing the sector in London and will be a unique resource for policymakers, funders and charity managers.

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?

We will always probably need some project funding for free property advice, but we foresee this reducing as our property consultancy and sales of our fairplace Award grow (www.fairplaceaward.com) Accordingly, this funding request effectively reduces each year - a slight increase in year 3 is for the London-only survey which we believe will deliver an invaluable legacy of property knowledge.

Who will benefit?

About your beneficiaries

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

182,800

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

London-wide (100%)

What age group(s) will benefit?

All ages

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

Revised

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Serviced Office Costs	13,000	13,390	13,792	40,182
Salary	69,418	71,501	73,646	214,564
IT	6,500	6,695	6,896	20,091
Survey & Statistical Analysis	3,500	0	4,000	7,500
Event Costs	2,000	2,060	2,122	6,182
Consultants	2,500	2,575	2,652	7,727
Legal & Professional	1,500	1,545	1,591	4,636
Other	4,900	5,047	5,198	15,146
Contingency	2,500	2,575	2,652	7,727
TOTAL:	105,818	105,388	112,549	323,755

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
NPPE – Tudor Trust	5,000	2,500	0	7,500
NPPE Grant – Garfield Weston	7,000	7,000		14,000
Sponsorship – Charity Bank	5,000			5,000
Other	9,750	3,500		13,250
TOTAL:	17,000	9,500	0	26,500

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
Simmons and Simmons	8,000			8,000
Charity Bank	0	5,000	5,000	10,000
MACE Group	6,000	6,000	6,000	18,000
Foundation Property & Capital		3,000	3,000	6,000
TOTAL:	14,000	14,000	14,000	42,000

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Serviced Office Costs	7,369	6,353	4,901	18,623
Salary	39,361	33,923	26,174	99,458
IT	3,686	3,176	2,451	9,313
Survey & Statistical Analysis	1,985	0	1,422	3,407
Event Costs	1,134	977	751	2,865
Consultants	1,418	1,222	943	3,583
Legal & Professional	851	733	565	2,149
Other	2,778	2,394	1,847	7,019
Contingency	1,418	1,222	943	3,583
TOTAL:	60,000	50,000	40,000	150,000

Finance details

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

Financial year ended:	Month: September	Year: 2015
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Income received from:	£
Voluntary income	163,120
Activities for generating funds	0
Investment income	170
Income from charitable activities	14,984
Other sources	0
Total Income:	178,274

Expenditure:	£
Charitable activities	210,561
Governance costs	11,639
Cost of generating funds	6,834
Other	0
Total Expenditure:	229,034
Net (deficit)/surplus:	-50,760
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	50,760

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	53,036
Long-term liabilities	0
*Total Assets (A):	53,036

Reserves at year end	£
Restricted funds	11,514
Endowment Funds	0
Unrestricted funds	41,522
*Total Reserves (B):	53,036

*** 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?
0%

Organisational changes

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

The 2015 loss is expected to be a surplus in 2016. This change originates from an increase in paid-for property consultancy to larger, well-resourced not-for-profits. We have also achieved sponsorship for our National Property Survey and increases of the fairplace Award our commercial workplace accreditation.

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
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	0	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	Year 3 £	Year 2 £	Most recent £
Tudor Trust	35,000	35,000	35,000
Trust for London	25,000	25,000	25,000
Garfield Weston	0	25,000	0
Esmee Foundation	12,500	0	0
	0	0	0

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: **Antonia Swinson**

Role within **Chief Executive**
Organisation: