

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Small Charities Coalition	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Lambeth	
Contact person: Mr. John Barrett	Position: Chief Executive
Website: http://www.smallcharities.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1122297
When was your organisation established? 14/01/2008	

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 improved skills in financial management		
Please describe the purpose of your funding request in one sentence. Building skills, knowledge and confidence within small charities in London across financial management, monitoring & evaluation and governance.		
When will the funding be required? 01/09/2017		
How much funding are you requesting?		
Year 1: £50,082	Year 2: £50,082	Year 3: £0
Total: £100,164		

Aims of your organisation:

The promotion of Small Charities for the benefit of the public including but not limited to:

Liaising with Small Charities, other voluntary organisations, government agencies and other groups on relevant issues;

- Providing training, conferences and seminars on subjects relevant to the efficacy of Small Charities;

- Identifying needs of Small Charities and establishing projects or policies to address them;

- Providing information to the press and the public in respect of Small Charities;

- Providing services such as legal, accountancy and management advice services to Small Charities;

- Providing advice and information on fundraising and volunteering for Small Charities;

- and acting as a representative of Small Charities in relation to government policies and legislation.

The advancement of education and research for the benefit of the public.

To do all such other things for the public benefit as may be charitable under the laws of England and Wales.

Main activities of your organisation:**Mentoring**

This service enables skills exchange and peer support between a small charity and somebody that has the experience, knowledge or expertise to coach, advise or mentor them through their issue.

Information and Guidance

Information and guidance includes our growing database of online resources and our telephone and email support function.

Events Programme

This programme delivers affordable and accessible training to our members. Our unique model allows us to keep costs low by brokering the generous support of our volunteer supporters and partner organisations to deliver and host workshops.

Policy & Engagement

We build relationships with decision makers and assess where small charity voices can be heard. Overall, this work seeks to ensure that policy makers consider and include small charity issues throughout all stages of decision making.

Community Portal (Autumn 17)

The Community Portal is essentially a new multi-functional online platform, which will guide, inform and facilitate each and every interaction we have with charity members, supporters and partners.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
5	1	10	535

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	9 months

Summary of grant request

This application is for continuation funding following on from our Building Resilience project which enabled us to reach over 2,132 direct beneficiaries over the three year period. This work allowed us to develop our suite of targeted services designed to meet the specific need of small charities in London and included events and workshops, mentoring matches, helpline and email support and access to relevant information and resources. By focusing broadly on governance issues, this work naturally encompassed the range of issues affecting charities and the needs of trustees including finance, business planning, fundraising and policy issues.

As outlined in our final report, the demand for these services continues to grow and the funding allowed us to foster more partnerships to establish our unique training model, broaden our support service options and consolidate our position as a champion of small charities. We know from external and internal research (detailed in the main proposal) as well as from our experience as a small charity ourselves, that small charities struggle to access the training and support that they would benefit from, largely due to cost and time availability. It is from this position and our conviction that the work remains strategically important for Londoners, that we request a further two years funding to maintain this delivery of high quality support services. We will continue to utilise our model of training, mentoring matches and helpline/email support backed up by a bank of resources and information tailored to the needs of small charities. Governance will remain a core thread throughout this work, however we will also particularly focus on developing the skills and knowledge of small charity staff in the current key priority areas of financial management and monitoring, evaluation and impact reporting.

Over the two years, we will deliver up to 118 events, create 86 new mentoring matches and answer 492 queries from London charities. These figures illustrate the targeted numbers for each of the outputs, however we anticipate that the volume in each area could be significantly higher especially in the second year of funding. This is due to the launch of our new website, CRM and customer portal (called the Community Portal project, see below) which will allow greater scale and volume as charities are able to navigate and 'self-serve' enabling them to receive a bespoke service according to their individual needs.

We believe we are the right organisation to deliver this work due to our successful track record over the past ten years delivering services to our members. We are always mindful of delivering the very highest quality service to our small charities and by harnessing the time and skills of professionals within the sector, we are able to continue this unique low-cost model which remains free or low cost for our small charity members.

The concept of cascading knowledge is at the heart of our training and mentoring models as both harness the skills and experience of those who generously share their knowledge and time with other charities. We seek to track this benefit through our monitoring and evaluation data both short term and long term as outlined in our framework. One example of this is our target of being able to report that at least 70% of charities will feel confident to apply their learning within their organisation.

Overall, this work addresses the 'Strengthening London's Voluntary Sector' strand by building skills, capacity and resilience in small charities across London enabling us to continue to support the sector to deliver the very best service to their beneficiaries with enhanced confidence.

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?

Not at present.

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.

To deliver a programme of training events and workshops targeted at small charity staff, trustees and volunteers in London.

Topics covered will include financial management, monitoring & evaluation, governance and fundraising. We will target to deliver 118 events over two years, reaching approximately 1,440 attendees from small charities across London.

To create, facilitate and manage 1-2-1 mentoring matches between skilled volunteers and small charity staff, trustees and volunteers in London. The match areas will include financial management, monitoring & evaluation, fundraising, governance, finance and communications.

We will target to create 86 new matches over two years.

To deliver an information and guidance service for small charities in London. This service will incorporate signposting to other partner organisations and referrals to the range of extensive materials contained within SCC's Resources Hub. The expected number of interactions we will deliver over two years is 492.

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.

Charities in London will have increased skills and knowledge in different subject areas including financial management and monitoring & evaluation, be more confident in these subject areas and be more confident to apply their learning.

Charities in London will be better equipped, more informed and have gained more connections to support their charity.

Charities in London will be stronger, more resilient, have increased sustainability and be better governed.

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, all work described form part of our core services and we will continue to seek grant and other funders for this work both within London and across the UK so as many small charities as possible benefit. As well as grant funders, we will seek funding from corporate partnerships, advertising and other income streams including statutory sources where appropriate.

Who will benefit?

About your beneficiaries

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

1,009

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?

21-30%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary costs relating to training and events in London*	24,140	24,140	0	48,281
Salary costs relating to Mentoring matches in London*	8,780	8,780	0	17,561
Salary costs relating to Information and Guidance in London*	5,062	5,062	0	10,124
Events costs	4,500	4,500	0	9,000
Volunteer expenses	864	864	0	1,728
Staff expenses, travel & training	1,260	1,260	0	2,520
Office costs, phones, computers, stationary & printing	1,530	1,530	0	3,060
Email credits	900	900	0	1,800
Contribution to organisational overheads	3,046	3,046	0	6,091
TOTAL:	50,082	50,082	0	100,165

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
This is the only application for this piece of work	0	0	0	0
	0	0	0	0
TOTAL:	0	0	0	0

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
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Email credits	900	900	0	1,800
Contribution to overheads @ 12%	3,046	3,046	0	6,091
TOTAL:	50,082	50,082	0	100,165

Finance details

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

Financial year ended:	Month: May	Year: 2016
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Income received from:	£
Voluntary income	8,833
Activities for generating funds	0
Investment income	152
Income from charitable activities	164,021
Other sources	0
Total Income:	173,006

Expenditure:	£
Charitable activities	140,984
Governance costs	0
Cost of generating funds	13,200
Other	0
Total Expenditure:	154,184
Net (deficit)/surplus:	18,822
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	114,527
Long-term liabilities	0
*Total Assets (A):	114,527

Reserves at year end	£
Restricted funds	33,486
Endowment Funds	0
Unrestricted funds	81,041
*Total Reserves (B):	114,527

* 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:

John Barrett, CEO for the past 3 years, is stepping down in July 2017. Our new CEO Mandy Johnson has been appointed and will officially start on 1 August. Due to retirement rotation and to address skills/experience and diversity gaps, the charity also appointed six new trustees in October 2016. One of these new trustees, Julia Kaufmann OBE was appointed Chair of the charity.

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 £
The Legal Education Foundation	17,500	17,500	0
Lloyds Bank Foundation	50,819	19,991	0
The Tudor Trust	30,000	30,000	30,000
Esmée Fairbairn Foundation	50,000	0	0
Garfield Weston Foundation	50,000	0	10,000

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: **John Barrett**

Role within **Chief Executive**
Organisation: