



The City Bridge Trust Committee

Date: THURSDAY, 9 JANUARY 2014
Time: 1.45pm
Venue: COMMITTEE ROOMS, 2ND FLOOR, WEST WING, GUILDHALL

Members: Deputy Billy Dove (Chairman)
Jeremy Mayhew (Deputy Chairman)
Deputy Ken Ayers
Simon Duckworth
Stuart Fraser
Marianne Fredericks
Alderman Alison Gowman
Deputy the Revd Stephen Haines
Vivienne Littlechild
Edward Lord
Wendy Mead
Alderman Matthew Richardson
Ian Seaton
The Rt Hon the Lord Mayor Alderman Fiona Woolf (Ex-Officio Member)

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Lunch will be served in the Guildhall Club at 1pm

John Barradell
Town Clerk and Chief Executive

AGENDA

Part 1 - Public Agenda

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**
To agree the minutes and non-public summary of the meeting held on 28 November 2013.

For Decision
(Pages 1 - 10)
4. **OUTSTANDING ITEMS**
To receive a report of the Town Clerk.

For Information
(Pages 11 - 12)
5. **PROPOSED REVENUE BUDGETS - 2014/15**
To receive a joint report of The Chamberlain and The Town Clerk.

For Decision
(Pages 13 - 18)
6. **PROGRESS REPORT AND EVENTS**
To receive a progress report of the Chief Grants Officer.

For Information
(Pages 19 - 40)
7. **GRANT APPLICATIONS STATISTICAL REPORT**
To receive a report of the Chief Grants Officer.

For Information
(Pages 41 - 44)
8. **GRANT RECOMMENDATIONS AND ASSESSMENTS**
To consider the Chief Grants Officer's reports on grant recommendations as follows:-

For Decision
(Pages 45 - 46)

 - a) British Wheelchair Basketball - Recommended Grant £80,380 (Pages 47 - 58)
 - b) Paddington Development Trust - Recommended Grant £80,000 (Pages 59 - 70)

- c) St Ethelburga's Centre for Reconciliation and Peace - Recommended Grant £89,500 (Pages 71 - 82)
- d) Ace of Clubs - Recommended Grant £47,400 (Pages 83 - 96)
- e) Westminster Arts - Recommended Grant £72,000 (Pages 97 - 100)
- f) Shoreditch Trust - Recommended Grant £132,700 (Pages 101 - 114)
- g) The Switchback Initiative - Recommended Grant £96,000 (Pages 115 - 126)
- h) Advice UK - Recommended Grant £75,000 (Pages 127 - 138)
- i) Action for Kids - Recommended Grant £107,700 (Pages 139 - 148)
- j) Partnership with Prisoners Abroad - Recommended Grant £330,000 (Pages 149 - 156)

9. TO CONSIDER REPORTS OF THE CHIEF GRANTS OFFICER AS FOLLOWS:-

For Decision

- a) Applications recommended for rejection (Pages 157 - 160)
- b) Withdrawn and Lapsed Applications (Pages 161 - 162)
- c) Grants Approved under Delegated Authority
- d) Reports on Monitoring Visits (Pages 163 - 168)

10. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE

11. ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT

12. EXCLUSION OF THE PUBLIC

MOTION – That under Section 100A(4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

Part 2 - Non-Public Agenda

13. NON-PUBLIC MINUTES

To agree the non-public minutes of the meeting held on 28 November 2013.

For Decision
(Pages 169 - 170)

14. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE

15. ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED

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Agenda Item 3

THE CITY BRIDGE TRUST COMMITTEE

Thursday, 28 November 2013

Minutes of the meeting of The City Bridge Trust Committee held at Guildhall, EC2 on Thursday, 28 November 2013 at 1.45pm

Present

Members:

Deputy Billy Dove (Chairman)
Jeremy Mayhew (Deputy Chairman)
Deputy Ken Ayers
Marianne Fredericks
Alderman Alison Gowman
Deputy Revd Stephen Haines
Wendy Mead
Alderman Matthew Richardson

Officers:

Xanthe Couture	- Town Clerk's Department
Steven Reynolds	- Chamberlain's Department
Anne Pietsch	- Comptroller and City Solicitor's Department
David Farnsworth	- The City Bridge Trust
Jenny Field	- The City Bridge Trust
Ciaran Rafferty	- The City Bridge Trust
Jemma Grieve Combes	- The City Bridge Trust
Tim Wilson	- The City Bridge Trust
Joan Millbank	- The City Bridge Trust
Karisia Gichuke	- The City Bridge Trust
Julia Mirkin	- The City Bridge Trust

1. APOLOGIES

Apologies for absence were received from Stuart Fraser, Vivienne Littlechild, Edward Lord and Ian Seaton.

The Chairman noted there were no charities in attendance and gave thanks to Ray Catt for his service to the Committee, now that he had resigned from the Court of Common Council.

2. MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA

Deputy Ken Ayers, Marianne Fredericks and Alderman Gowman declared a non-pecuniary interest in respect of Item 8.b) National Theatre due to being members of the National Theatre.

3. **MINUTES**

The minutes and summary of the meeting held on 30 October 2013 were approved as a correct record, subject to a correction of the recommended grant at Item 7.h) Choice in Hackney to read £71,800.

4. **OUTSTANDING ITEMS**

The Committee received a report of the Town Clerk that identified items which required further action by officers.

Members were informed that a satisfactory budget for 2013/14 had been received from Mousetrap Theatre Productions.

5. **TERMS OF REFERENCE & FREQUENCY OF MEETINGS**

The Committee considered a report of the Town Clerk which sought approval for the terms of reference of the City Bridge Trust and the frequency of meetings.

RESOLVED – That,

- a) The terms of reference be approved for submission to the Court.

6. **PROGRESS REPORT AND EVENTS**

The Committee considered the regular progress report and events update of the Chief Grants Officer.

The Chief Grants Officer informed Members of the launch of Trust support for the London Youth Quality Mark as part of the Trust's Investing in Londoners programme. The Chief Executive of London Youth had been very impressed with the partnership approach initiated by the Trust.

The Chief Grants Officer advised Trust officers had been attending training on the City's new procurement regulations and at this meeting the extension of the Champollion contract was being requested at a cost of £14,000, which would be met through the Trust's local risk budget. It was noted that an additional expense of £4,950 towards the work of Champollion to complete the Parklife London website would be sought through delegated authority.

RESOLVED – That,

- a) Members note the contents of this report; and
- b) with respect to the proposed extension of Champollion's contract, the waiver of the City's Procurement Regulations relating to tender threshold for consultants be approved.

7. **GRANT APPLICATIONS**

The Committee considered a report of the Chief Grants Officer, which dealt with recommendations relating to applications received from the current programmes. Members noted that a total of 24 applications would be dealt with at the meeting, of which 2 were strategic initiatives, 10 were recommended for

approval, 5 recommended for rejection, 5 had been withdrawn. 2 grants were noted as proposed for approval under delegated authority.

RESOLVED – That,

- a) Members note the contents of the report; and
- b) the individual grant recommendations in relation to the application set out in summary schedule and other papers be considered.

8. **GRANT RECOMMENDATIONS AND ASSESSMENTS**

The Committee considered a report of the Chief Grants Officer which recommended grants to various organisations.

Members considered each application and the following observations were noted:

Item 8.d) (NOVA new opportunities) – Members expressed concern over the organisation's past financial records, and officers noted their financial situation had improved and monitoring would be undertaken with the grant released quarterly.

Item 8.g) (Vitalise) – it was noted that a revised section 8, most recent audited or independently examined accounts for the year ending March 31 2013, had been received. Members and officers discussed the changes to the organisation's debt and surplus figures over 2012/13, and officers advised the overall deficit comprised of 3 elements due to revaluation, operating activities from renovation and restructuring costs which had been well managed.

Item 8.h) (Havering Association for People with Disabilities) - it was noted that a revised section 8, most recent audited or independently examined accounts for the year ending March 31 2013, had been received.

Item 8.j) (Coram Voice (formerly Voice for Child in Care) – Members and officers discussed the recent change in structure of the organisation and it was noted the grant was subject to satisfactory updates and officers were satisfied with the governance structure.

8.a) **Otakar Kraus Music Trust - Recommended Grant £35,600**

£35,600 over three years (£11,200; £11,800; £12,600) for the costs of providing a specialised Music School for one day per week, subject to receipt of satisfactory budget for 2014.

8.b) **National Theatre - Recommended Grant £50,000**

£50,000 towards access improvements at the National Theatre.

8.c) **Tower Hamlets Community Transport - Recommended Grant £86,150**

£86,150 over three years (£36,200; £33,300; £16,650) towards the salary and support costs of a full-time Business Development Manager.

8.d) NOVA new opportunities - Recommended Grant £51,300

£51,300 over three years (3 x £17,100) for the salary of a part-time (3dpw) ESOL Co-ordinator to oversee the delivery of Pre-entry and Level 1 ESOL courses.

8.e) SSBA Community Trust - Recommended Grant £37,880

£37,880 over two years (£18,750; £19,130) to run English Language and sewing classes twice a week for isolated women, subject to receipt of satisfactory audited accounts for the period to 31st March 2013.

8.f) MADE in Europe - Recommended Grant £79,200

£79,200 over two years (£39,300; £39,900) towards the salaries of a Project Manager (3 dpw) and Outreach Worker (2 dpw) and costs of rolling out the Green Guide and Award scheme to support London's mosques and other Islamic groups to become more environmentally friendly.

8.g) Vitalise - Recommended Grant £51,000

£51,000 over three years (£17,000; £17,000) towards running costs for Jubilee Lodge and related core costs for Vitalise.

8.h) Havering Association for People with Disabilities - Recommended Grant £25,000

£25,000 for a further and final year for the salary and on-costs of the part-time (4 dpw) Personal Budgets Advocate.

8.i) National Centre for Young people with Epilepsy - Recommended Grant £72,600

£72,600 over three years (£23,500; £24,200; £24,900) towards the salary of a full-time Transitions Support Worker and related costs, on condition that the balance of funding is raised from other sources.

8.j) Coram Voice - Recommended Grant £81,300

£81,300 over three years (£27,000; £27,000; £27,300) towards the salary of a full time Specialist Advocate, and the costs of training and support to London professionals, for young people in London leaving care. The grant is conditional on the receipt of satisfactory updates on the implementation of the new business strategy.

9. STRATEGIC INITIATIVES

9.a) Pan-London Personalisation Project

The Committee considered a report of the Chief Grants Officer which proposed the Committee support the continuation of a project which provides support to some of London's most entrenched rough sleepers into a life away from the streets. Members remarked that this project was in line with the work of the City's Department of Community and Children's Services and was an initiative that was making an impact.

It was noted that the organisation's free unrestricted cash reserves held at 31 March 2013 were £1.23 million and not £1.23 as stated.

RESOLVED – That,

- a) A sum of £80,000 over 18 months to enable Broadway Homelessness and Support to continue the roll out of the Pan-London Personalisation Project be approved, to be costed against the budget for Strategic Initiatives for 2013/14.

9.b) Research into Funder Impact Practice

The Committee considered a report of the Chief Grants Officer which proposed that Members support New Philanthropy Capital to research impact measurement practice by a range of grant-making organisations including trusts and foundations, family foundations and corporate funders.

RESOLVED – That,

- a) support for the New Philanthropy Capital to research the work that UK voluntary sector funders undertake to assess impact be approved, at a cost of £5,000 to be charged against the City Bridge Trust Strategic Initiatives allocation for 2013/14.

10. PROPOSED PARTNERSHIP WITH BUTTLE UK

The Committee received a report of the Chief Grants Officer which set out proposals to develop a hardship fund, in partnership with Buttle UK, for survivors of domestic violence in London.

The Chairman stated he was pleased work was being undertaken with Buttle UK. Officers explained Buttle UK had a strong record of supporting families in crisis and this work would incorporate learning from a project in Scotland to establish a network of referral agencies to provide resettlement support that would enhance the financial assistance of Buttle UK. It was noted the organisation had submitted a proposal for a project over three years, and the Trust was recommending that funds be committed for 18 months initially with a re-assessment of the likely funding requirement for the remaining 18 months presented to the Committee in 2014/15.

RESOLVED – That,

- a) Buttle UK be awarded a grant of £470,000 from your grants budget for 2013/14 in order to establish and administer a hardship fund for survivors of domestic violence in London.

11. TO CONSIDER REPORTS OF THE CHIEF GRANTS OFFICER AS FOLLOWS:-

11.a) Grants Recommended for Rejection

The Committee considered a report of the Chief Grants Officer which recommended that 5 grant applications from the Working for Londoners programme be rejected for the reasons identified in the schedule attached to the report.

11.b) Withdrawn and Lapsed Applications

The Committee received a report of the Chief Grants Officer which provided details of 5 applications which had been withdrawn.

11.c) Grants Approved under Delegated Authority

The Committee received a report of the Chief Grants Officer which advised Members of 2 grants, totalling £44,500, which had been presented for approval under delegated authority to the Chief Grants Officer in consultation with the Chairman and Deputy Chairman.

11.d) Reports on Monitoring Visits

The Committee received a report of the Chief Grants Officer relative to 2 visits that had been undertaken.

12. STATISTICAL MONITORING REPORT, WORKING WITH LONDONERS - JULY 2008 - MARCH 2013

The Committee received a report which provided Members with statistical analysis of the Working with Londoners programmes that were launched in July 2008 and looked at the 2,230 application received between the launch date and 31st March 2013.

Officers informed Members that the success rate for applications had remained steady since 2008 and the average annual success rate of applications received was 43%, which was considered relatively high in the sector. The break-down of funding per borough was also listed and it was observed that there were some boroughs that the Trust was not reaching and there were also smaller organisations which did not meet the Trusts' eligibility criteria.

Members and officers discussed how the Trust could be more strategic in its grant giving to smaller organisations going forward, and it was advised that Trust's work going forward in this area would be presented to the Committee at its February 2014 meeting. The Chairman remarked that this was a fascinating and useful report.

Officers felt that the promotion of the Investing in Londoners programmes would proactively reach out to boroughs which had received less funding in the past.

The Deputy Chairman remarked that there was a lack of knowledge in some boroughs of the work of the Trust. It was the case that the Chief Grants Officer would continue to follow up with relevant contacts established by Members at events when the opportunity arose, such as Members of Parliament in deprived boroughs.

Members sought clarity over how the borough benefit of grants to boroughs had been presented and analysed (Table 1, pg. 191). Officers advised that the grant amount awards were ranked against their relative position of indices of multiple deprivation. However they cautioned that, due to the quality of the data provided by applicants the information presented in Table 1 was an approximate measure, as grants which had benefited multiple boroughs had not been included.

13. THE COL AS TRUSTEE OF BRIDGE HOUSE ESTATES

The Committee received a report of the Town Clerk, Chamberlain, Comptroller and City Solicitor and Chief Grants Officer in response to a request from Members to explain the role of the City of London Corporation as Trustee of the charity, Bridge House Estates (BHE) and to clarify the distinct functions and responsibilities of Committees that carry out business related to BHE.

The Chief Grants Officer remarked that the information contained within the report was all found in the public domain and served to bring all aspects of BHE governance together, and to note that City Bridge Trust (CBT) was the name given to the grant-giving arm (or activities) of the BHE, of which the City of London Corporation was the sole trustee.

Members suggested that this report would serve as useful information for all Members of the Court of Common Council and it was agreed that it be circulated for information to Members at a future meeting of the Court.

The Deputy Chairman drew the attention of Members to the Charity Commission's guidance on a Council's Role as Charity Trustee (page 4), which highlighted the importance of separating the management of the charity from the business of the local authority, thereby serving to minimise the risk of conflicts of interest. He noted the recent Quinquennial Review of CBT grant programme categories, and the overall grant-making strategy and its future direction then agreed by the City Bridge Trust Committee and approved by the Court of Common Council, was a sensible arrangement. This process of agreeing grants policy was then supported by Resource Allocation Sub Committee of Policy and Resources who advised on the quantum of BHE income surplus to be used for CBT grant giving.

The Deputy Chairman added that any proposal which shifted CBT grant-giving should be tested against the criteria of local authorities as trustees of charities as set out in the Charity Commission's Local Authorities' Charities Guidance.

Members and officers discussed the clarity of information presented in paragraphs 17, 18, 19, 20, 21 on page 5, and it was agreed that these paragraphs should more correctly be made sub paragraphs of paragraph 16.

A Member suggested that it would be helpful for the revised report to append the current CBT Grants Policy which had recently been agreed.

Members and officers discussed the wording of paragraph 31 (page 8), which currently implied elements of the BHE's work were conducted through Policy and Resources, which were the remit of CBT. To clarify the information relating to terms of reference currently listed in the report, it was agreed the report would be revised to properly clarify the role of Policy and Resources Committee when acting as BHE trustee.

It was noted that CBT grant-giving over £500,000 was approved through the Court of Common Council and in the past, if the Policy and Resources Committee had noted a surplus it had been given to CBT to be applied by way of grants. It was requested that the report further clarify the existing governance arrangements in the event that additional BHE funds be released beyond the income surplus allocated annually to the CBT grants budget.

The Deputy Chairman recommended that the existing grant-giving arrangements, which were in accordance with the Charity Commission's Local Authorities Charities Guidance and demonstrated good governance of charitable activities within a local authority, be continued in the future.

The Chairman proposed and it was agreed that officers revise the report with amendments noted and the Town Clerk circulate to Members of the Committee for comment. The report would then be agreed through delegated authority by the Chairman and Deputy Chairman, in consultation with the Chief Grants Officer, and presented for information at a future meeting of the Court of Common Council.

RESOLVED- That

- a) a report be brought to the Court of Common Council for information, subject to the amendments referred to in the detail above that explains the role of the City of London Corporation as Trustee of Bridge House Estates; and
- b) the report to clarify the role of the Trust, the separation of functions and responsibilities of the Policy and Resources Committee, with particular reference to its Resource Allocation Sub Committee, Bridge House Estates, and the City Bridge Trust Committee.

14. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

15. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT**

There were no urgent items.

16. **EXCLUSION OF THE PUBLIC**

A Member expressed in relation to the standing order to exclude the public, given the nature of this meeting as a non-local-authority Committee, and the Town Clerk undertook to investigate this matter.

RESOLVED – That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting for the following items on the grounds that they involve the likely disclosure of exempt information as defined in Part 1 of the Schedule 12A of the Local Government Act.

Item No	Exempt Paragraphs
17	3
18	3

17. **NON-PUBLIC MINUTES**

The non-public minutes of the meeting held 28 November 2013 were approved as a correct record.

18. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

Questions were raised as follows –

The Garden Bridge project.

19. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

There were no items of urgent business.

The meeting ended at 3.24pm

Chairman

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Item	Action	Officer responsible	Progress by
28 November 2013			
CoL as Trustee of Bridge House Estates	Report to be brought to the Court of Common Council for information that explains the role of the City of London Corporation as Trustee of Bridge House Estates.	Xanthe Couture	Report to be received at Court of Common Council 16 th January 2014
30 October 2013			
Social Investment funding	Update report on CBT grantees who may be able to access Social Investment funding.	Tim Wilson	Market analysis to start December 2013. New grants programme (part of Investing in Londoners) to launch March 2014
4 September 2013			
Grant Recommendations Introductory Report format	Review the structure of the report so that information more clearly presented.	Jemma Grieve Combes	9 th January 2014 to coincide with Investing in Londoners recommendations.
Outstanding Financial Conditions: CBT Committee – 4 September 2013			
Castlehaven Community Association	Grant conditional on securing full match funding.	Joan Millbank/Chamberlain	Organisation expects to know outcome of match-funding bid in March/April 2014
Outstanding Financial Conditions: CBT Committee – 4 July 2013			
Young People Matter	Grant subject to receipt of satisfactory budget for 2013/14	Joan Millbank/Chamberlain	Anticipated by 9 th January 2014
CBT Committee – 28 November 2013			
Otakar Music Trust	Grant subject to satisfactory budget for 2014	Ciaran Rafferty/Chamberlain	Anticipated 9 th January 2014
SSBA Community Trust	Grant subject to receipt of satisfactory audited accounts for the period ended 31 st March 2013	Sandra Davidson/Chamberlain	Due by 12 th February 2014

Agenda Item 5

Committee:	Date:
The City Bridge Trust Committee	9 January 2014
Subject:	Public
Proposed Revenue Budgets – 2014/15	
Report of:	For Decision
The Chamberlain The Town Clerk	

Summary

This report provides the annual submission of the revenue budgets overseen by your Committee. In particular it seeks approval to the proposed budget for 2014/15, for subsequent submission to the Finance Committee. The budgets have been prepared within the resources allocated to the Town Clerk and are summarised in the table below.

Table 1 Summary Revenue Budget for the City Bridge Trust Committee	Latest Approved Budget 2013/14 £000	Original Budget 2014/15 £000	Movement £000
Expenditure	23,400	16,881	(6,519)
Income	(75)	(77)	(2)
Support Services and Capital Charges	79	74	(5)
Total Net Expenditure	23,404	16,878	(6,526)

Overall, the budgeted net expenditure for 2014/15 is estimated to be £16.878m, a decrease of £6.526m compared with the budget for 2013/14. The main reasons for this net decrease are:-

- 2013/14 includes two one-off grant programmes, the first for £3.2m towards young people Not in Employment, Education or Training (NEETS) and the second for £280,000 for City Carers Open House; and
- budgets carried forward from 2012/13 to 2013/14 of £2.966m have been removed.

City Bridge Trust's overarching aim is to maximise its use of all the resources at its disposal, including opportunities offered by the City of London Corporation, for the benefit of disadvantaged Londoners. During the forthcoming year priorities include promoting and implementing the Trust's Investing in Londoners programmes; the continued development of 'City Philanthropy: A Wealth of Opportunity strategy'; the continued development of the City Corporation's Social Investment strategy; and the implementation of the Trust's 'Sharing Learning and Knowledge' strategy.

Recommendations

The Committee is requested to:

- review the provisional 2014/15 revenue budget to ensure that it reflects the Committee's objectives and, if so, approve the budget for submission to Finance Committee; and
- authorise the Chamberlain to revise these budgets to allow for any necessary realignment of funds resulting from corporate projects.

Main Report

Introduction

1. A cy près scheme agreed by the Charity Commission in 1995 enabled Bridge House Estates to distribute the Estate's surplus income for charitable purposes across Greater London. The amount available for grants from the surplus income is determined each year by the Policy and Resources Committee.
2. This report sets out the proposed revenue budget for 2014/15. The revenue budget management arrangements:
 - provide a clear distinction between local risk, central risk and recharge budgets;
 - place responsibility for budgetary control on departmental Chief Officers; and
 - apply a cash limit policy to Chief Officers' budgets.

Business Planning Priorities

3. The City Bridge Trust's priorities include:
 - The promotion and implementation of the Trust's Investing in Londoners programmes, ensuring that the annual grants budget is allocated in full and that the City Bridge Trust Committee receives timely, accurate and high quality reports.
 - The continued development of the City of London Corporation's strategy on philanthropy through 'City Philanthropy – A Wealth of Opportunity' initiative, which aims to encourage City professionals to engage with philanthropy earlier in their careers.
 - The continued development and implementation of the City Corporation's Social Investment Strategy, with particular focus on its £20m Fund investing in activities that generate a social as well as a financial return.
 - The implementation of the Trust's 'Sharing Learning and Knowledge' strategy which enables it to share and disseminate the learning it derives from its grant-making and related activities.

Proposed Revenue Budget for 2014/15

4. The proposed Revenue Budget for 2014/15 is analysed between:
 - Local Risk budgets – these are the budgets deemed to be largely within the Chief Officer's control.
 - Central Risk budgets – these are budgets comprising specific items where a Chief Officer manages the underlying service, but where the eventual financial outturn can be strongly influenced by external factors outside of his/her control or are budgets of a corporate nature (e.g. interest on balances and rent incomes from investment properties).
 - Support Services and Capital Charges – these cover budgets for services provided by one activity to another. The control of these costs is exercised at the point where the expenditure or income first arises as local or central risk.
5. The provisional 2014/15 budgets, under the control of the Town Clerk being presented to your Committee, have been prepared in accordance with guidelines agreed by the Policy & Resources and Finance Committees. These include a general cash limit allowance of 2% covering both employee and non-employee budgets, as well as the proper control of transfers of non-

staffing budget to staffing budgets. These budgets have been prepared within the resources allocated to the Town Clerk.

6. The budgets are set out in Table 2. Income and favourable variances are presented in brackets. Only significant variances (generally those greater than £100,000) have been commented on in the following paragraphs.

Table 2						
Revenue Budget for the City Bridge Trust Committee						
Analysis of Service Expenditure	Local or Central Risk	Actual 2012-13 £'000	Latest Approved Budget 2013-14 £'000	Original Budget 2014-15 £'000	Movement 2013-14 to 2014-15 £'000	Para-graph Ref
EXPENDITURE						
Employees	L	721	793	728	(65)	7 & 8
Transport Related Expenses	L	3	4	4	0	
Supplies & Services (note i)	L	216	281	199	(82)	
Supplies & Services (note ii)	C	14,606	22,322	15,950	(6,372)	
Total Expenditure		15,546	23,400	16,881	(6,519)	
INCOME						
Customer, Client Receipts (note iii)		(39)	(75)	(77)	(2)	
Total Income		(39)	(75)	(77)	(2)	
TOTAL EXPENDITURE BEFORE SUPPORT SERVICES AND CAPITAL CHARGES		15,507	23,325	16,804	(6,521)	
SUPPORT SERVICES AND CAPITAL CHARGES						
Central Support Services & Capital Charges		241	243	238	(5)	
Recharges within Fund		(164)	(164)	(164)	(0)	
Total Support Services and Capital Charges		77	79	74	(5)	
TOTAL NET EXPENDITURE/(INCOME)		15,584	23,404	16,878	(6,526)	

Notes

- (i) Supplies and Services – Equipment, furniture, materials, uniforms, printing, stationary, professional fees, grants & subscriptions.
- (ii) Supplies and Services – This relates entirely to the grants budget.
- (iii) Customer, Client Receipts – Relates to the contract income for administering the Wembley National Stadium Trust.

7. Overall there is a decrease of £6.526m between the latest 2013/14 budget and the 2014/15 proposed budget. This movement largely relates to a decrease in the central risk grants budget of £6.372m, from £22.322m to £15.950m, which is due to:
- i) the removal of the following one-off additional grants initiatives:
 - £3.2m for NEETS (young people Not in Employment, Education or Training); and
 - £280,000 towards the expansion of the City Carers Open House programme.
 - ii) removal from the budget of a one-off carry forward of £2.892m from 2012/13 to 2013/14.
8. The grants budget for 2014/15 of £15.950m comprises £14.950m for the standard grants programme and £1.0m towards the Employability Partnership with Central London Forward to provide pre-employment training and mentoring for young people (£2.0m in total split equally over 2013/14 and 2014/15).
9. Analysis of the movement in manpower and related staff costs is shown in Table 3 below.

Table 3 Manpower Statement	Latest Approved Budget 2013/14		Original Budget 2014/15	
	Manpower Full-time equivalent	Estimated cost £000	Manpower Full-time equivalent	Estimated cost £000
Administrative Staff – CBT (see paragraph 10)	14.4	733	13.4	663
Administrative Staff – WNST	0.9	48	0.9	52
Training and Recruitment Advertising		12		13
TOTAL EMPLOYEE COSTS	15.3	793	14.3	728

10. The decrease of one FTE between 2013/14 and 2014/15 is due to the end of a one year fixed term contract which was funded by a carry forward in 2013/14.

Potential Further Budget Developments

11. The provisional nature of the revenue budgets particularly recognises that further revisions may arise from the necessary realignment of funds resulting from corporate projects including;

- savings arising from the on-going PP2P reviews; and
- central and departmental support service apportionments.

Revenue Budget 2013/14

12. The forecast outturn for the current year is in line with the latest approved budget of £23.404m.

Contact Officers:

Town Clerks Department:

Jenny Field (Deputy Chief Grants Officer): Jenny.Field@cityoflondon.gov.uk

Chamberlain's Department:

Steven Reynolds (Group Accountant): Steven.Reynolds@cityoflondon.gov.uk

Agenda Item 6

Committee:	Date:	Item No.
The City Bridge Trust	9 th January 2014	
Subject: Progress Report	Public	
Report of: Chief Grants Officer	For Information	
<u>Summary</u>		
<p>This is a regular Progress Report by the Chief Grants Officer.</p> <p>Recommendations:</p> <p>That you</p> <ul style="list-style-type: none">a) receive this report and note its contentsb) agree the principles behind the Social Investment Resource draft paper attached at Appendix B		

Main Report

- 1.0 Your new Investing in Londoners grants programmes continues to attract a steady flow of applications and the new online application system is working well. The new programmes are also acting as a catalyst for further improvements to your grant-making.
- 1.1 The grants management database software GIFTS will be upgraded in the next 3 months and this will increase the effectiveness of our ability to monitor your grants and analyse the workflow of the grant-making process. This is being done in conjunction with a revised statistical reporting format (please see later in your papers) and the adoption of the new Monitoring and Evaluation framework you have approved.
- 1.2 As the new grants programmes start to bed-in, we are gaining more experience of which elements of your grants policy further need refining to maximise impact. We are drawing these together in anticipation of presenting you with revisions for your consideration in the first half of next year. It is preferable that these are considered en masse as procedurally they are considered by you in the first instance, and then your recommendations are put before the Court of Common Council for approval.
- 1.3 To mark the new grants programme and in response to the grants budget surplus carried over from last year, you will receive several higher value strategic grants applications for your consideration in your

February and March 2014 papers. This will potentially make significant impact on the remaining grants budget for this year.

2.0 The City Funding Network

- 2.1 You may recall that you are supporting The Funding Network to run the City Funding Network as part of your 'City Philanthropy – A Wealth of Opportunity' initiative. (You will hear a short presentation on the wider activities of 'City Philanthropy' at your meeting today).
- 2.2 Launched in July 2012, the City Funding Network is a giving circle of young City professionals introducing them to small charities and to the social aspects of being a member of a network of like-minded individuals.
- 2.3 Its latest event took place on 4th December 2013 at Cope de Cava, Blackfriars, attended by approximately 70 people. The evening opened with wine tasting and tapas before four charities (Action for Stammering Children, Helen Bamber Foundation, Streetscape and Kawempe Home Care) made Dragon's Den-style 'pitches' about the work of their organisations. The evening raised £32,000 for them. Michael Palin, who founded the Michael Palin Centre for Stammering Children, was guest of honour. He spoke about his philanthropic journey and why he gives to charity after firstly giving a highly apt and hilarious rendition of the Monty Python 'Merchant Banker' sketch.

3.0 NCVO's 16th Annual Hinton Lecture

- 3.1 On 9th December 2013, City Bridge Trust hosted NCVO's 16th Annual Hinton Lecture which was given by Peter Riddell CBE, of the Institute for Government. The Deputy Chief Grants Officer welcomed approximately 120 guests and spoke about the Trust, its history and its priorities.
- 3.2 Entitled *Policymaking and implantation – how decision-making in Whitehall can be broadened and linked to the views and needs of public service users*, Peter Riddell used the lecture to raise his concerns that Part 2 of the Lobbying Bill¹ could seriously hamper charities' campaigning activities. He said that whilst it was absolutely right that charities should not favour one candidate or one party over another, their freedom to express views and engage in debate should be absolute. He also spoke about his organisation's work to improve the policy-making process and to address the gap between Whitehall officials with those who run services, including within the voluntary sector.

¹ The full title of the Bill is 'Part 2 of the Transparency of Lobbying, Non-party Campaigning and Trade Union Administration Bill'.

4.0 Media Work

4.1 City Philanthropy – a Wealth of Opportunity

Thanks to the efforts of the media agency, Champollion, the Telegraph ran an interview with Heather Rabbatts CBE on 27th November 2013 who was due to receive the Freedom of the City that day in recognition of her charitable work (unfortunately, this did not take place on the day as Ms Rabbatts was unwell). The interview took place in Charterhouse during the City Philanthropy exhibition which helped to raise the profile of the City of London Corporation.

4.2 Champollion, together with your City Philanthropy manager, Cheryl Chapman, have continued to encourage social media activity during the exhibition with several bloggers stimulating discussion around fantasy philanthropy (“If you were a philanthropist for a day, how would you spend £1m?”). Additionally, the Chief Executives of nine large charities, all with several thousand followers, were asked to re-tweet the question to their followers, resulting in considerable Twitter activity. They have also produced a series of infographics (visually appealing facts about philanthropy and philanthropists, such as Dick Whittington) for distribution on Twitter.

4.3 City AM is due to publish its World Charity Index 2013 which Cheryl Chapman has fed into. The feature includes a section on philanthropy in the City and a quote from Cheryl Chapman.

4.4 Get Young People Working – the Youth Offer

An article featuring your £100,000 grant to the City of Westminster was published on the website, “Fresh Business Thinking” which recognises the support of the City of London Corporation’s charity, City Bridge Trust.

4.5 Working with Londoners

A news item was published on E2B Pulse website, a platform encouraging carbon reduction, again referencing the support of the City of London Corporation’s charity, City Bridge Trust.

5.0 Arts Apprenticeships – Funding Principles

5.1 Your papers today include notification of a grant approved under delegated authority to support two apprentices in Montage Theatre Arts. This represents the first funding under this new strand of Investing in Londoners. The aim of this programme is to match-fund grants made to London-based arts organisations under the Arts Council’s Creative Employment Programme (CEP).

5.2 The CEP exists to support young unemployed people into meaningful and formal apprenticeships in the creative industries. Your grants, as with the CEP funding, are at a maximum level of £2,000 per apprentice and for wage costs only. You will support up to 2 apprentices in an organisation

and the national minimum wage (currently £5.03 ph for those aged 18-20; £3.72 for Under 18s) must be paid. Your scheme, enthusiastically welcomed by the sector, is intended to make the provision of apprenticeships more feasible for organisations by reducing the need for them to dip into their reserves.

6.0 Social Investment

6.1 The City of London Corporation Social Investment Fund (established in October 2012) recently marked its first anniversary. This £20m Fund, using capital drawn from Bridge House Estates, was created for investments that produce a positive financial return and demonstrable social benefit. Overseen by the Social Investment Board, the Fund has achieved the first-year targets set by Common Council. Details of the aims of the Fund and its first year activities accompany this report as Appendix A, which is a copy of a report to be tabled to the January Court of Common Council.

6.2 In light of the development of the Fund and the related social investment policy activity (on which you heard a presentation at your last meeting), resource needs going forward have been considered. A draft resources paper, prepared jointly with the Economic Development Office, in consultation with the Chamberlain and Town Clerk, is attached to this report at Appendix B. You are asked to approve the principles behind this paper. Chairmen of the relevant committees and key Members are being consulted on this draft. A final paper will be put before the relevant committees during January 2014. You will note that:

6.2.1 The projected resources going forward for 2014/15; and 2015/16 are commensurate with expenditure over the last year;

6.2.2 The City Bridge Trust local risk budget will continue to fund the Chief Grants Officer and the Principal Grant's Officer, Tim Wilson, and the time they contribute to the Social Investment Fund; an uplift to the Trust's local risk budget to sought to cover 2 days of administrative time to support the Fund's expanding investment portfolio and pipeline of applications;

6.2.3 An additional social investment analyst role is proposed. This is for 2 or 3 days per week for 6 - 9 months on a consultancy basis, developing into an employed position which will work across the Chamberlain's Department and the City Bridge Trust. The funding for this proposed role is detailed in the recommendations set out in Appendix B.

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Report written: 20th December 2013

Report of the Social Investment Board**City of London Corporation's Social Investment Fund
First Year Activities****Summary**

Under the leadership of the Policy & Resources Committee, the City Corporation is working to position London as a global hub for social investment. In October 2012 you approved a designation of £20 million from Bridge House Estates for investments that produce a positive financial return and demonstrable social benefit and the purpose of this report is to inform Members of progress. In its first year, the City of London Corporation Social Investment Fund (the Fund) has committed £2.1 million to a range of ventures across the UK and overseas. The Fund's work complements the City Corporation's social investment policy and advocacy work, which has been a wide-ranging programme of major events, research and policy consultation.

Your Fund has exceeded its investment target for its first year. Your social investment policy and advocacy work has helped position the City Corporation as a leader in this field.

Recommendation

The Court is recommended to receive the report and note its contents.

Main Report**Background**

1. The City of London Corporation has a long-standing commitment to social investment. It is working to establish London as a recognised global hub for social investment, under the leadership of the Policy & Resources Committee, by pursuing the following aims:
 - Encouraging and steering a growing supply of appropriate finance into social investment;
 - Working to improve the regulatory and fiscal framework needed to support the social investment marketplace; and
 - Developing the capacity of social organisations to access investment and secure contracts and markets.
2. At its meeting on 24th May 2012 the Court agreed to designate £20 million from Bridge House Estates for investments in activities that produce both financial returns at a rate not less than the average interest rate earned on the City's cash holdings and a demonstrable social benefit. This designation is known as the City of London Corporation Social Investment Fund (the Fund).

3. The Fund has two objectives:
 - To provide loan finance, quasi-equity and equity that provides development and risk capital to organisations working towards charitable ends or with social purpose; and
 - To help develop the social investment market.
4. The Fund can invest directly into organisations pursuing charitable, community or social objectives and indirectly into socially-focused funds managed by others.
5. 60% of the Fund is designated to support work that benefits Londoners, 30% for UK-based beneficiaries, and 10% for overseas beneficiaries.
6. A Social Investment Board was established to oversee the Fund, and its aims, objectives, outline investment strategy and governance arrangements you approved at your meeting on 25th October 2012. The Social Investment Board sits alongside the Financial and Property Investment Boards and is to be appointed annually by the Investment Committee. Alderman Peter Hewitt was elected as its Chairman.
7. The Fund is administered by the Chief Grants Officer for the City Bridge Trust with input from Chamberlain's, Comptroller and City Solicitor's Departments and the Economic Development Office. Independent, FCA-regulated advisors are involved in the financial assessment of each proposal presented to the Social Investment Board.

First Year Targets

8. In its report to you on 25th October 2012, the Policy & Resources Committee noted that the Fund would focus on capital preservation and the development of expertise in its first year. It was noted that first investments were likely to be in instruments offering lower risk such as secured loans and short-term bonds as appraisal and monitoring processes were established.
9. The target dispersal rate for the first year (ending October 2013) was £2 million.

First Year Activity

10. In its first year the Fund has committed £2.1 million across five social investments. £1.6 million of this commitment has been placed, with the remaining £500,000 pledged subject to the completion of satisfactory legal agreements which are currently underway. Because of the very early stage in the investment cycle, the board considers that it is too soon to comment on individual investment performance.

11. The four investments are: the Small Enterprise Impact Investing Fund, the Real Lettings Property Fund, the Golden Lane Housing Bond, and Midlands Together.
12. **The Small Enterprise Impact Investing Fund** is a product from Oxfam / Symbiotics, which was developed with support from the City of London. It supports small and medium sized enterprises in low to middle income economies, prioritising those investment opportunities that focus on job creation, food security and women's empowerment. **£318,513** has been invested in this fund.
13. **The Real Lettings Property Fund** has been developed by the homelessness charity Broadway in partnership with Resonance Limited. Their fund aims to purchase up to 260 one and two bedroom properties in Greater London for tenants who are, or have previously been, homeless. **£500,000** has been invested in this fund.
14. **Golden Lane Housing**, a subsidiary charity to the Royal Mencap Society, issued a bond in 2013, with funds raised reserved for the purchase, adaptation and letting of up to 30 freehold properties to people with learning disabilities. **£500,000** has been invested in this bond.
15. **Midlands Together**, a new venture, also issued a bond in 2013 with funds reserved for a programme providing employment, training and mentoring to 100-150 ex-offenders through a property refurbishment programme across the West Midlands. **£300,000** has been invested in this bond.
16. **A further £500,000** has been committed to invest in accommodation for homeless people in the Midlands, and full details will be announced once the investment is placed.

The Regional breakdown of investment is as follows:

Region	Total committed	Proportion of Fund commitments to date
London	£500,000	24%
UK	£1,300,000	61%
Overseas	£318,513	15%

Social Investment Policy

17. The Fund complements the City Corporation's social investment policy and advocacy work.

18. The City Corporation has hosted a large range of events (including an international conference attracting over 300 potential investors from 35 countries), meetings and delegations with a view to promoting the opportunities of social investment to new investors, and to understand and unlock the barriers faced for their involvement. The total value of new social investment funds (some of which are still raising capital) will provide in excess of £100 million additional finance to the stock of capital available. Meanwhile, demand for social investment has risen from £165 million in 2010- 2011 to £202 million in 2011-2012 and is expected to increase further thereafter.
19. The City Corporation is part of a small market stewardship group with Big Society Capital, Cabinet Office, Big Lottery Fund and Social Enterprise UK to ensure there is a strategic vision and coordinated action across the sector. The City Corporation is also a co-founder member of a new Social Investment Research Council comprising the market stewardship members and Citibank. This work provides understanding of the needs of social enterprises as well as the needs of the social investment market.
20. The City Corporation's policy and advocacy work has supported a range of market-enabling outcomes including:
 - the introduction of a Social Investment Tax relief in the 2014 Budget, underpinned by detailed research commissioned by City Corporation and Big Society Capital on the rationale and likely impact of introducing such a relief;
 - the engagement of the Financial Conduct Authority with the social investment market;
 - recognition in the Financial Services Bill of the motivations of a social investor and a review of the Community Interest Company structure to see how it could encourage investors more effectively;
 - debate in the European Union as to how Structural Funds could be used to support the strengthening of the social sector organisations across Europe; and
 - representation, by the Chairman of Policy and Resources Committee, on the UK National Advisory Board to the G8 Taskforce on social impact investment.

Conclusions

21. The City of London Corporation Social Investment Fund has been welcomed as a forward-thinking initiative and helps to strengthen your work to position

London as a global hub for social investment. The Fund has exceeded its first year investment target, and has provided capital to support socially beneficial ventures that also meet the Fund's financial criteria. The governance and administrative arrangements have worked well, providing scrutiny to investment proposals and monitoring current holdings.

22. The City Corporation's policy and advocacy work has helped to situate London as an international hub for social investment, as a place in which impact fund managers are represented, deals are done, products are designed, expertise is available, and the operating regime is enabling.

All of which we submit to the judgement of this Honourable Court.

DATED

SIGNED on behalf of the Board

Alderman Peter Hewitt
Chairman of the Social Investment Board
13th December 2013

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Committee:	Date:	Item No.
The City Bridge Trust Finance Policy & Resources	9 th January 2014 21 st January 2014 23 rd January 2014	
Subject: Resourcing for the City of London Corporation's Social Investment Activity	Public	
Report of: Chief Grants Officer	DRAFT	
<p><u>Summary</u></p> <p>The purpose of this paper is to consider and make recommendations on the future resourcing of the City Corporation's social investment work following the first year of operation of the City of London Corporation's Social Investment Fund (£20m) and in view of the expiry of the Social Investment Adviser's contract in March 2014.</p> <p>Recommendation</p> <p>That approval be sought as follows:</p> <ul style="list-style-type: none"> a) from the Finance Committee for an allocation of £20k from its Bridge House Estates contingency for the costs of the social investment analyst during 2013/14; b) from the Policy and Resources Committee for a budget adjustment to accommodate the management costs of the social investment fund for 2014/15 (£92.8k) and 2015/16 (£106.8k) ; the intention being that investment returns would cover the fund management costs over the medium term; c) from the Policy and Resources Committee to a budget uplift to meet the costs of extending the Social Investment Adviser role on the basis on 3 days per week for up to a further 2 years, at a cost of £50k (<i>rounded</i>) in each of 2014/15 and 2015/16. 		

Main Report

Purpose and recommendations

- 1.1 The purpose of this paper is to consider and make recommendations on the future resourcing of the City Corporation's social investment work following the first year of operation of the City of London

Corporation's Social Investment Fund (£20m) and in view of the expiry of the Social Investment Adviser's contract in March 2014. It is proposed that this paper be considered by the Town Clerk and key Members in advance of the submission of a report to the relevant Committees.

1.2 In the light of the success of the City Corporation's Social Investment work to date, agreement is sought:

- from the Finance Committee for an allocation of £20k from its Bridge House Estates contingency for the costs of the social investment analyst during 2013/14;
- from the Policy and Resources Committee for a budget adjustment to accommodate the management costs of the social investment fund for 2014/15 (£92.8k) and 2015/16 (£106.8k) ; the intention being that investment returns would cover the fund management costs over the medium term;
- from the Policy and Resources Committee to a budget uplift to meet the costs of extending the Social Investment Adviser role on the basis on 3 days per week for up to a further 2 years, at a cost of £50k (*rounded*) in each of 2014/15 and 2015/16.

1.3 It be noted that the SIA events/operational budget of £20k will be met from savings in either the SIA budget or EDO budget in 2014/15 and 2015/16.

Background

2.1 One reason for London's long-term success as a financial centre has been its ability to spot opportunities, develop new products and create imaginative solutions to problems. The growing market for social investment is one such new opportunity which the City Corporation has grasped. Following more than three years of work by the Chairman of Policy & Resources as well as Officers in the Economic Development Office, City Bridge Trust, City Solicitor's and Chamberlain's teams, the City Corporation is now recognised as a significant and credible player in the UK social investment sector.

2.2 This work has taken place in pursuit of the City Corporation's Social Investment Strategy which has had three core areas:

- Encouraging and steering a growing supply of appropriate finance into social investment (including establishing and developing the City Corporation's own £20 million Social Investment Fund);

- Working to improve the regulatory and fiscal framework needed to support the social investment marketplace;
- Developing the capacity of social organisations to access investment and secure contracts and markets

The overall aim has been to work towards establishing London as a recognised global hub for social investment.

Achievements to date

- 3.1 In its first year the Fund has committed £2.1 million across five social investments. £1.6 million of this commitment has been placed, with the remaining £500,000 pledged subject to completion of satisfactory legal agreements (currently underway).
- 3.2 The City Corporation has hosted a large range of events (including an international conference attracting over 300 potential investors from 35 countries), meetings and delegations with a view to promoting the opportunities of social investment to new investors, and to understand and unlock the barriers faced for their involvement. The total value of new social investment funds (some of which are still raising capital) will provide in excess of £100m additional finance to the stock of capital available. Meanwhile, demand for social investment from the social enterprise sector has risen from £165m in 2010- 2011 to £202m in 2011-2012.
- 3.3 The City Corporation is part of a small market stewardship group with Big Society Capital, Cabinet Office, Big Lottery Fund and Social Enterprise UK to ensure there is a strategic vision and coordinated action across the sector. The City Corporation is also a co-founder member of a new Social Investment Research Council comprising the market stewardship members and Citibank. This work provides understanding of the needs of social enterprises as well as the needs of the social investment market.
- 3.4 The City Corporation has established a significant reputation in the area of social investment policy (thanks in large part to the work of its Social Investment Adviser, Katie Hill), and built strong relations with the EU, Cabinet Office, Treasury and the institutional investment community on this topic. The City Corporation's policy and advocacy work has engaged all political parties and supported a range of market-enabling outcomes including:
 - the introduction of a Social Investment Tax relief with effect from 2014, as detailed in the December 2013 Autumn Statement, underpinned by detailed research commissioned by City

Corporation and Big Society Capital on the rationale and likely impact of introducing such a relief;

- the engagement of the Financial Conduct Authority with the social investment market;
- recognition in the Financial Services Bill of the motivations of a social investor and a review of the Community Interest Company structure to see how it could encourage investors more effectively;
- debate in the European Union as to how Structural Funds could be used to support the strengthening of the social sector organisations across Europe; and
- representation, by the Chairman of Policy & Resources on the UK National Advisory Board to the G8 Taskforce on social impact investment.

3.5 At a point when significant momentum and profile has been developed, Officers believe it is time to review the resources available for the City Corporation's social investment work.

Resourcing to date

- 4.1 With growing momentum behind its own social investment activity and the wider market, in 2012 the City Corporation recruited Katie Hill as Social Investment Advisor (SIA) on a one year consultancy contract (4 days per week). The role (and associated operational costs) was approved by the City Bridge Trust Committee and the Policy and Resources Committee and funded 50% from City Bridge Trust grant and 50% by the Policy Initiatives Fund (£50k each). The £100k comprised £65.6k for the SIA role and an operational budget of £34.4k. The consultancy was extended for a second year and this is due to expire in March 2014. The SIA has worked alongside Sophie Hulm, EDO's Corporate Responsibility Manager on policy influencing activity.
- 4.2 When the City Corporation's Social Investment Fund was established in October 2012, it was agreed that resources until the end of March 2013 would be met from City Bridge Trust's local risk budget, with a budget uplift sought from Policy & Resources for subsequent years. Work on the fund has been managed by Principal Grants Officer, Tim Wilson, with support from the SIA together with approximately 2 days per week of administrative support from within the City Bridge Trust and support from the Chamberlain's and Comptroller & City Solicitor's Departments.

- 4.3 In addition to staffing costs, expenditure has been required for the Fund on independent specialist advisers (one of the conditions on which the Fund was set up), and legal costs associated with the placing of investments and IT.
- 4.4 In 2013-14 total expenditure on social investment (policy and fund work) will amount to £179,230¹ excluding the costs of the Corporate Responsibility Manager, Principal Grants Officer and Chamberlain).

Future resourcing

The need

- 5.1 The City Corporation's social investment work has gained a good deal of recognition and momentum but there is still much more to be done on the policy side over the next eighteen months to two years. Therefore, Officers have concerns about reducing our contribution to this area from April 2014 on the expiry of the Social Investment Advisor's current contract. We have considered how we might embed this work within existing resources within EDO, but have concluded that we neither have the spare capacity nor the specific skills in house.
- 5.2 In the light of our experience of investing the first £2m from the Social Investment Fund, we are now in a better position to identify the resources required to manage the fund. Officers have considered the additional resources that are necessary and these are summarised in the table below:-

¹ This includes a sum of £20k which has yet to be approved for an Investment Analyst in the current year

	2013/14 £000	2014/15 £000	2015/16 £000
SIA role (fixed term post)	65.6 4 days pw (Source: P&R and CBT Committees)	49.2 3 days pw	49.2 3 days pw
Investment analyst	20.0*	36.0 3 days pw	50.0 4 days pw
Admin support	14.6 2 days pw (Source: CBT Local Risk)	14.6 2 days pw	14.6
Operational/ Specialist advice: • Legal • IT • Social investment	44.6 (Source: CBT Local Risk)	42.2	42.2
SIA policy associated costs /events	34.4 (Source: P&R and CBT Committees)	20	20
Total	179.2	162	176
Amount available from existing budgets	159.2	20	20
Balance required	20	142	156

* not currently budgeted for

5.2 It is envisaged that by September 2015 or the latest by April 2016, the Social Investment Advisor's policy influencing work will largely be completed and the activity can then be absorbed within the work of EDO. As a result, Officers recommend continuing to employ a Social Investment Advisor for **up to** a further two years from April 2014 on a 3 day a week basis. This would involve 2 days based in EDO on general policy influencing and (one day a week) also to be spent assisting Members and Officers on the Fund's strategy (based in City Bridge Trust). Because of the specialist nature of the role, it does not lend itself to a direct employment contract with City

Corporation. Once the fund is established and the City Corporation becomes more experienced in making investments (i.e. beyond 2016), this advisory service, if needed, can be bought in on an ad hoc basis.

- 5.3 An associated costs/events budget should also be allocated, as previously, albeit for a lower amount. This budget has proved very useful for research, such as the examination of the role of tax relief in encouraging market development and events such as two seminars with Independent Financial Advisers hosted at Guildhall.
- 5.4 In addition, there is a need for a dedicated Investment Analyst on a permanent basis (for 3 days per week in year one, expected to rise to 4-5 days in year 2 as the number of investments increases). The analyst will appraise the growing pipeline of investment opportunities, providing in-depth review before passing the most promising prospects across to the Fund's third party advisors for due diligence. The analyst will also monitor active investments and provide some advisory support to organisations with formative proposals which may be suitable for the Fund in due course.
- 5.5 This role would be based in both the Chamberlain's Department and City Bridge Trust, bridging the financial and social impact areas of expertise within the City Corporation and supporting the cross learning so vital to this area of work. It is suggested that this analyst support be provided by a secondee from the "City" investment community for the first 6 – 9 months with a view to informing permanent recruitment. The role of the Investment Analyst will be reviewed as part of the restructuring of the Corporate Treasury function within the Chamberlain's department, with a view to the possibility of a wider Investment Analyst function being performed in-house. The proposal was considered by Finance Investment Board in December 2013.
- 5.6 Overall coordination of Fund management (as required by the Court in October 2012) will continue to be the responsibility of the Chief Grants Officer of City Bridge Trust. This will continue to be delivered through the work of the Principal Grants Officer. In addition to this management time, the social investment fund work will need to be supported by dedicated administrative support in City Bridge Trust of 2 days per week. The resource requirement in future years for operational/specialist advice for the fund (ie specialist independent advisers to analyse applications to the Fund (as required by the Court), together with legal fees and IT costs) is expected to be at a similar level, albeit slightly less, to the current year (£44.6k).

Costs

- 6.1 The proposed level of resources, for continuing these Social Investment activities in 2014/15, is not dissimilar to the level in the current year.
- 6.2 Extending the SIA's contract on a 21 hour per week basis would cost just under £50k, and an operational budget of £20k (reduced from £34.4k last year) would allow for events, research and materials.
- 6.3 In addition to the on-going staff time from City Bridge Trust (Chief Grants Officer and Principal Grants Officer) and the Economic Development Office (Assistant Director and Corporate Responsibility Manager) the total amount of resource required to manage the social investment policy work and the Social Investment Fund is;

Request for funds

- 7.1 **2013/14:** It is proposed to request £20k in 2013-14 from Finance Committee's Bridge House Estates contingency to cover the costs of an Analyst on secondment to the Corporation (not currently budgeted for).
- 7.2 **2014/15 and 2015/16:** It is proposed that a budget adjustment is made to Bridge House estates to accommodate the management costs of the social investment fund (£92.8k for 2014/15 and £106.8k for 2015/16 comprising the analyst, admin support and operational costs).
- 7.3 In addition, a request be made to the Policy and Resources Committee for a budget uplift of £50k per annum for the SIA role, for up to 2 years. There may be a saving in the second year if the need for the role ceases within a shorter time.
- 7.4 The events budget for policy related work of £20k per annum will be met from any savings in the SIA budget in the previous years and/or the EDO local risk budget.
- 7.5 CBT will continue to contribute the time of the Chief Grants Officer and Principal Grants Officer, and EDO the time of the Corporate Responsibility Manager over the next 2 years.
- 7.6 **In the medium term (3-5 years)** it is anticipated that a growing percentage of the social investment fund management charges should be recovered from the return on investments and the fund become self-sustaining.

Recommendation

That approval be sought as follows:

- a) from the Finance Committee for an allocation of £20k from its Bridge House Estates contingency for the costs of the social investment analyst during 2013/14;
- b) from the Policy and Resources Committee for a budget adjustment to accommodate the management costs of the social investment fund for 2014/15 (£92.8k) and 2015/16 (£106.8k) ; the intention being that investment returns would cover the fund management costs over the medium term;
- c) from the Policy and Resources Committee to a budget uplift to meet the costs of extending the Social Investment Adviser role on the basis on 3 days per week for up to a further 2 years, at a cost of £50k (*rounded*) in each of 2014/15 and 2015/16.

It should be noted that the SIA events/operational budget of £20k will be met from savings in either the SIA budget or EDO budget in 2014/15 and 2015/16.

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Report written: 20th December 2013

THE CITY BRIDGE TRUST

**Professional Development Events, Conferences and Seminars
Attended 14TH November to 20th December 2013**

Date	Organisation	Type of Event	City of London's Representative	Location/ Borough	Summary Comments
14/11/13	London Funders	Trustee meeting	Jemma Grieve Combes, Grants Officer	Euston	Regular meeting of London Funder's board of which your officer is a member.
20/11/13	Wellcome Trust	Seminar	Tim Wilson, Principal Grants Officer	Euston	A regular meeting for staff from Trusts and Foundations with responsibility for learning and development work.
21/11/13	London Funders	Seminar	Tim Wilson, Principal Grants Officer	Euston	An opportunity to hear presentations on a grantee perception survey which CBT will undertake in 2014.
21/11/13	Social Finance	Seminar	Tim Wilson, Principal Grants Officer	Great Portland Street	A round table discussion for grant-makers to consider issues which could be financed through social investment.
21/11/13	Tower Hamlets Council for Voluntary Service	Funding Presentation	Jemma Grieve Combes, Grants Officer; Ciaran Rafferty, Principal Grants Officer	Tower Hamlets	Funding presentation to share your new priorities with voluntary organisation in Tower Hamlets.
04/12/13	Buzzacott	Seminar	Jemma Grieve Combes, Grants Officer and Martin Hall, Grants Assistant	City	Regular meeting of users of the GIFTS grants management software to share good practice.

10/12/13	MyBnk	Monitoring Visit	Vivienne Littlechild; Ian Seaton; Karisia Gichuke, Senior Grants Officer	London E1	This was a routine monitoring visit to learn of the work of the organisation in delivering financial literacy to care leavers.
12/12/13	Association of Charitable Foundations	Trustee meeting	Tim Wilson, Principal Grants Officer; Karisia Gichuke, Senior Grants Officer	Kings Cross	Regular meeting of ACF's board which two of your officers sit on.
18/11/13	Creative & Cultural Skills	Launch	Ciaran Rafferty, Principal Grants Officer	Royal Festival Hall, South Bank	Launch by the Deputy Prime Minister of a national scheme to create 50,000 paid jobs for young people in the creative industries. Your Arts Apprenticeships programme was formally announced and gained much appreciation.
22/11/13	Anchor House	Visit	Marianne Fredericks; Deputy Town Clerk; Chief Grants Officer	London E16	As part of their induction to the work of CBT, Marianne Fredericks, the Deputy Town Clerk and the Chief Grants Officer paid a visit to Anchor House. They were accompanied by the Director of Housing Services who was interested to learn about Anchor House's work.
27/11/13	Tricycle Theatre	Project Visit	Chief Grants Officer; Ciaran Rafferty, Principal Grants Officer	Kilburn, NW6	A chance, as part of the Chief Grants Officer's induction, to see the Theatre's excellent work with young refugees, funded by the Trust.
27/11/13	Refugee Action	Seminar	Ciaran Rafferty, Principal Grants Officer	Garden Court Chambers, Lincoln's Inn Fields	Event to formally launch a report on the work of RA's Access to Justice project.

28/11/13	Bexley Council for Voluntary Service (BCVS)	Funding Presentation	Ciaran Rafferty, Principal Grants Officer; Julia Mirkin, Grants Officer	Bexleyheath, Kent	An event to tell an assembled and appreciative audience of your new Investing in Londoners programme.
04/12/13	London Borough Access Officers	Presentation	Ciaran Rafferty, Principal Grants Officer	Guildhall	Presentation of your funding for access and inclusion to a regular meeting convened by the CoL Access Team.

**General Events and Receptions
Attended 14th November to 20th December 2013**

Date	Organisation	Type of Event	City of London's Representative	Location/Borough	Summary Comments
20/11/13	Migrant & Refugee Communities Forum (MRCF)	Reception	Ciaran Rafferty, Principal Grants Officer	Amnesty UK, Shoreditch	Event to celebrate MRCF's 20 th anniversary. Keynote speakers included BBC journalists/broadcasters Samira Ahmed and Fergal Keane.
10/12/13	Small Charities Coalition	Reception	Tim Wilson, Principal Grants Officer	IBM, South Bank	Annual reception marking Small Charities Coalition's work over the past year.
20/11/13	Museum of London	Dinner	Chief Grants Officer & Deputy Chief Grants Officer	Museum of London	Annual Dinner
04/12/2013	The Funding Network	Fundraiser	Deputy Chief Grants Officer	Copa de Cava, EC4	Please see Chief Grants Officer's Progress Report for more information.
09/12/2013	NCVO	Annual Lecture	Deputy Chief Grants Officer	Livery Hall	Please see Chief Grants Officer's Progress Report for more information.

Committee(s):	Date(s):	Item no.
City Bridge Trust	9 th January 2014	
Subject: Grant Applications Statistical Report		Public
Report of: Chief Grants Officer		For Decision
Ward (if appropriate): N/A		
<u>Summary</u>		
<p>This paper summarises applications received and action taken under your grants programmes in 2013/14. 27 applications will be dealt with at today's meeting for a total recommended sum of £1,163,206. This leaves £7,683,740 unspent on your grants budget for 2013/4 with 2 meetings remaining.</p>		
<u>Recommendations</u>		
That you:		
a) note the contents of the report		

Main Report

1.0 Introduction

- 1.1 This paper summarises action taken in 2013/14 on grant applications received under your Working with Londoners and Investing in Londoners grants programmes. It charts overall spend against your current year grants budget, grants made by programme outcomes, action taken on applications received and a summary of today's recommendations.
- 1.2 City Bridge Trust grants are awarded in line with your policy guidance which includes the priorities and exclusions that were ratified for the Trust by the Court of Common Council, in July 2013.

2.0 Grants budget 2013/14

- 2.1 27 applications will be dealt with at today's meeting for a total recommended sum of £1,163,206. The implications of today's recommendations are shown in Table 1 against the original grants budget for 2013-14. The overall grants budget includes £2,892,000 carried forward from 2012/13 (approved by the Resource Allocation

sub Committee in July 2013) and grant spend written back or revoked in 2013/14 to date of £142,710. If you agree the applications recommended for a grant today this will leave £7,683,206 unspent on your grants budget for 2013/4 with 2 meetings remaining.

Table 1: Overall spend against 2013/14 budget

	Grants budget	Grants spend
Original Grants Budget	£14,950,000	
Carry forward from 2012/13	£2,892,000	
Write-Backs & Revocations	£142,710	
Total Budget Available	£17,984,710	

Previous committee meetings		
April 2013		£1,430,095
May 2013		£959,930
June 2013		£992,107
July 2013		£1,126,120
September 2013		£1,195,427
October 3/13		£1,162,395
October 30/13		£1,102,160
November 2013		£1,169,530
Sub-total approved spend		£9,137,764
Remaining budget	£8,846,946	

Today's recommendations		
January 2014		
Working with Londoners		£702,980
Investing in Londoners		£460,226
Total January 2014		£1,163,206

Remaining budget	£7,683,740	
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3.0 Grants made by outcome area

- 3.1 Table 2 shows the breakdown of grants awarded this financial year by outcome area. Please note that only Working with Londoners programme areas have been included in this analysis. Analysis by programme areas under your new Investing in Londoners grants will be included in future reports once there are sufficient applications to consider.

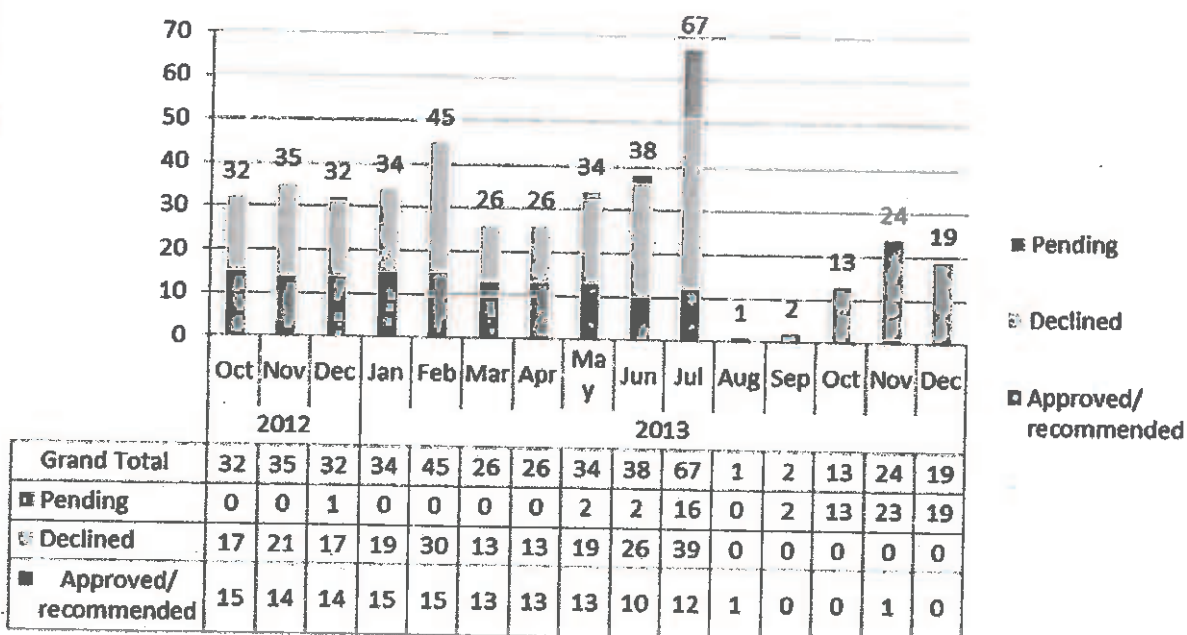
Table 2: Grant approvals by outcome area

Fund/Program	Year to date		Today's meeting		Overall Total	
	£	No.	£	No.	£	No.
Accessible London	£1,179,932	39	£0	0	£1,179,932	39
Accessible Sports	£153,700	8	£80,380	2	£234,080	10
Bridging Communities	£1,251,745	78	£175,500	3	£1,427,245	81
Greening the Third Sector	£14,105	6	£0	0	£14,105	6
Improving Londoners' Mental Health	£810,050	42	£0	0	£810,050	42
London's Environment	£632,270	20	£47,400	1	£679,670	21
Older Londoners	£1,157,855	51	£24,000	1	£1,181,855	52
Positive Transitions to Independent Living	£1,588,050	45	£72,000	3	£1,660,050	48
Strengthening the Third Sector	£1,199,500	27	£228,700	3	£1,428,200	30
Exceptional Grants	£80,000	1	£75,000	4	£155,000	5
Strategic Initiatives	£600,557	11	£4,950	1	£605,507	12
Other Investing in Londoners grants	£470,000	1	£455,276	9	£925,276	10
Grand Total	£9,137,764	329	£1,163,206	27	£10,300,970	356

4.0 Applications received

4.1 Chart 1 shows applications received by month and the action taken (excluding strategic initiatives). You will notice that there was a large peak in applications in July. This was when your Working with Londoners grants programmes closed to new applications and the peak reflects a rush to submit applications before the closure. Your Investing in Londoners applications launched in September 2013. Application numbers are growing, with a small peak in December which is not a complete month at the time of writing.

Chart 1: Applications received by month and action taken



5.0 Today's applications

27 applications will be dealt with at today's meeting. Table 3 notes the type of action required. Full details of each of these applications are shown in separate sections later on in your papers.

Table 3: Action to be taken on applications today

Action to be taken	Total	Working with Londoners	Investing in Londoners
Applications recommended for grant	10	8	2
Grants approved by delegated authority <£5k (to note)	3	0	3
Grants approved by delegated authority <£25k (to note)	3	2	1
Applications recommended for rejection	6	2	4
Withdrawn applications (to note)	3	3	0
Applications lapsed (to note)	2	2	0
Total applications	27	17	10

Recommendations:

That you

- a) note the contents of the report.

Contact: **Jemma Grieve Combes**
Grants Officer - 020 7332 3174
jemma.grievcombes@cityoflondon.gov.uk
 Report written: 20.12.2013

The City Bridge Trust Working with Londoners Summary of Grant Recommendations

	Ref No.	Organisation	Requested Amount	Recommended Amount
<u>Accessible Sports</u>				
a)	11913	British Wheelchair Basketball	£80,100	£80,380
<i>Total Accessible Sports</i>			£80,100	£80,380
<u>Bridging Communities</u>				
b)	11991	St Ethelburga's Centre for Reconciliation and Peace	£89,589	£89,500
c)	11988	Paddington Development Trust	£80,000	£80,000
<i>Total Bridging Communities</i>			£169,589	£169,500
<u>Improving Londoners' Mental Health</u>				
d)	11961	Ace of Clubs	£34,500	£47,400
<i>Total Improving Londoners' Mental Health</i>			£34,500	£47,400
<u>Older Londoners</u>				
e)	11808	Westminster Arts	£72,000	£72,000
<i>Total Older Londoners</i>			£72,000	£72,000
<u>Positive Transitions to Independent Living</u>				
f)	11986	Shoreditch Trust	£125,800	£132,700
g)	11945	The Switchback Initiative (known as Switchback)	£109,185	£96,000
<i>Total Positive Transitions to Independent Living</i>			£234,985	£228,700
<u>Strengthening the Third Sector</u>				
h)	11895	Advice UK	£75,042	£75,000
<i>Total Strengthening the Third Sector</i>			£75,042	£75,000
Grand Totals			£666,216	£672,980

The City Bridge Trust
Investing in Londoners
Summary of Grant Recommendations

	Ref No.	Organisation	Requested Amount	Recommended Amount
<u>Making London More Inclusive</u>				
i)	12014	Action for Kids	£82,500	£107,700
<i>Total Making London More Inclusive</i>			£82,500	£107,700
<u>Partnership Programmes - Hardship Fund</u>				
j)	12111	Prisoners Abroad	£330,000	£330,000
<i>Total Partnership Programmes - Hardship Fund</i>			£330,000	£330,000
Grand Totals			£412,500	£437,700

MEETING: 09/01/2014

Ref: 11913

ASSESSMENT CATEGORY - Accessible Sports

British Wheelchair Basketball

Adv: J. Grieve Combes

Base: Outside London

Benefit: London-wide

Amount requested: £80,100

{Revised request: £80,363}

Amount recommended: £80,380

Purpose of grant request: The innovative and exciting London Wheelchair Basketball Development Programme; promoting grassroots accessibility for all and empowering disabled people across London.

Background

British Wheelchair Basketball (BWB) is the national governing body for Wheelchair Basketball in the UK. Its work includes supporting and developing a national league programme of more than 130 teams; School, Community, University and Talent programmes; and supporting national teams that have enjoyed success at European, World and Paralympic levels. Wheelchair Basketball embraces a wide range of disabilities including paraplegics, spina bifida, amputees, brittle bones, cerebral palsy and multiple sclerosis, but players without disabilities are also encouraged to play and are eligible to compete in divisions 1-4, junior league and women's league. As well as fulfilling its role as a governing body, BWB also runs a grassroots programme of work to support people with disabilities through wheelchair basketball. It is under this programme that BWB is applying to you today.

Funding History

None

Current Application

BWB has identified London as an under-developed area of wheelchair basketball, with the third lowest regional participation in the country. In response BWB piloted the London Wheelchair Basketball Development Project over 2 years, starting in 2011 with funding from the Lord's Taverners, Sports Match and the Mayor's Fund. The programme was very successful with a throughput of 17,500 people and a five-fold increase in London basketball clubs from 2 to 10. However, it was also found that there was more work to be done and that the new clubs developed needed longer-term support to become self-sufficient. BWB therefore wants to extend the life of the project to have longer-term impacts.

The proposed project would provide opportunities for 9,000 people to be introduced to wheelchair basketball across London. It would focus on developing clubs which act as the centre of the sport. The London Development Officer would develop 9 new clubs; support the existing

clubs; develop 12 school clubs; run taster sessions (for example in shopping centres); and provide young official/leader/coaching courses to enable people to deliver coaching across the capital in their clubs, schools and universities. Crucially, BWB believes this support will result in 50 new disabled people per year taking up wheelchair basketball on a regular basis, giving them full access to coaching, weekly training, competition and social support networks.

Financial Observations

Audited accounts for the year ended 31st March 2013 show an overall surplus of £93,443 (5% of turnover), comprising £55,451 on unrestricted funds and £37,992 on restricted funds.

The organisation's reserves policy is to hold between 3 and 6 months' worth of fixed support costs which equates to a target holding of up to £250,000 (which equates to 2.6 months' worth of total expenditure). At 31st March 2013 unrestricted reserves stood at £453,225. This includes designated funds of £250,000 towards the financial risk of underwriting the European Championships in 2015.

The budget for 2013/14 shows a deficit of £182,130 (18.7% of turnover), comprising £135,130 on restricted funds and £47,000 on unrestricted funds. Total forecast income is £973,944, of which £734,056 (75%) has been confirmed as at 18th December 2013.

Officer's Appraisal

This is an exciting time for Wheelchair Basketball. The London 2012 Paralympic Games saw unprecedented coverage of the sport, yet take-up of the sport by people with disabilities in London remains below its potential. BWB seeks to challenge this through a proven model of delivery. The organisation's belief in the project is demonstrated not only through its passion but also through a financial commitment that has seen it use its unrestricted reserves to fund the postholder whilst they seek external funding. Your grant, if awarded, would allow BWB to put the London Development project on a sustainable footing for the next three years and support longer-term impacts of development work in London.

BWB originally requested funding of £80,100 from towards project costs. It has subsequently changed this request now to cover the salary of the Development Officer - bringing the overall request to £80,363. Project administration and on-costs will be covered from a range of other funds, from income generated and, if necessary, reserves.

Recommendation

£80,380 over three years (£26,000; £26,780; £27,600) for the salary of the full time Wheelchair Basketball London Development Officer.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11913

Date Received:

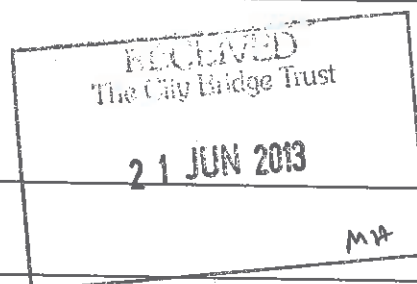
19/06/2013

Programme
Area:

01

1. About your organisation

Name of organisation applying for grant: British Wheelchair Basketball	
If the organisation is part of a larger organisation, what is its name? No, but also known as - GBWBA	
Address for correspondence: SportPark, Oakwood Drive, Loughborough Leicestershire	
Postcode: LE11 3QF Is this your home address? No	
Contact person: Mr Charlie Bethel	Position: Chief Executive
Phone: 01509 279900	Fax: 01509 279909
E-mail: c.bethel@gbwa.org.uk	
Website: http://www.gbwa.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1144808	
Date organisation established: 25/11/2011	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Accessible Sports
Purpose for which funds are requested: (25 words maximum) The innovative and exciting London Wheelchair Basketball Development Programme; promoting grassroots accessibility for all and empowering disabled people across London.
How much funding is requested? Year 1: £26,700 Year 2: £26,700 Year 3: £26,700 Total: £80,100

3. Aims of your organisation

British Wheelchair Basketball (BWB) will create, underpin and deliver quality opportunities for players at all levels across the United Kingdom to obtain the best possible performances for teams, clubs and each and every member.

We will continue to:

- change the way people think and act towards disabled people.
- support the opportunities disabled people have to participate in sport and exercise.
- support local areas to make sure disabled people can take part in the places where they live.
- raise awareness and understanding of the needs of disabled people through sport, information and training.
- To allocate our resources as cost-effectively as possible in order to deliver high-quality service to the maximum number of disabled and able bodied people.

4. Main activities of your organisation

At BWB we are addressing challenges faced by people with disabilities by providing a platform of activity that enables disabled people to participate on an equal level to their able bodied siblings and friends as well as providing a tool for integration in schools and the community. BWB has a strong national league programme with over 130 teams together with School, Community, University and Talent programmes underpinning a planned academy and the national teams that have enjoyed success at European, World and Paralympic level. BWB aims to create, underpin and deliver quality opportunities for players at all levels across the United Kingdom to obtain the best possible performances for teams, clubs and each and every member.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
12	2	12	1,000

6. How do you support your volunteers?

We support our volunteers by offering high quality training, travel expenses per activity, insurance. We also offer access to local and national networks, local Skills Active and local county Sport Partnerships.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	15 yr lease expiring 2025

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2013**

Income received from:	£
Voluntary income	1,705,446
Activities for generating funds	
Investment income	37
Income from charitable activities	128,571
Other sources	
Total Income	1,834,054

Expenditure:	£
Charitable activities	1,591,666
Governance costs	36,934
Cost of generating voluntary income	112,011
Other	
Total Expenditure	1,740,611
Net (Deficit)/Surplus:	93,443
Other Recognised Gains/(Losses)	0
Net Movement in Funds	93,443

Asset position at year end	£
Fixed assets	72,896
Investments	0
Net current assets	763,831
Long-term liabilities	0
*Total A	836,727

Reserves at year end	£
Endowment funds	
Restricted funds	327,269
Unrestricted funds	509,458
*Total B	836,727

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
90%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

n/a

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year:	Ref: 0	Grant received: £0	OR application rejected?	No
Month/Year:	Ref: 0	Grant received: £0	OR application rejected?	No
Month/Year:	Ref: 0	Grant received: £0	OR application rejected?	No

12. Previous funding received

Funding received by your organisation from the following sources during the last THREE years: (i) City of London (other than the City Bridge Trust)(ii) London boroughs (iii) London Councils (formerly ALG) (iv) Health authorities (v) Central government departments (vi) Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:			
	Year: 2010	Year: 2011	Year: 2012
(i)			
(ii)			
(iii)			
(iv)			
(v)			
(vi) Mayors Fund		36,600	78,900

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last TWO years. List source, years and annual amounts:		
	Year: 2011	Year: 2012
The Lord Taverners	36,000	0
National Governing Body	28,090	11,000
Sportsmatch	36,000	0
Skills Active	4,500	9,375

14. What steps is your organisation taking to reduce its carbon footprint?

BWB is reducing our carbon footprint by:

- Producing literature electronically eg Sports handbook work in progress to offer as an app.
- Electronic Registration process
- Strategic placement of sport wheelchairs around London to cut down on transport movement.

As an organisation we continue to identify areas that can effectively reduce its carbon footprint.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

In order to provide the right information, please refer to guidance note 15 before completing this section.

Children, young people and adults with disabilities want to do the same types of activities as anyone else thus experiencing the physical, psychological benefits of exercise. In addition to feeling good, raising self-confidence, promoting better health and possible improvement in ability, sport and exercise can also bring added benefits such as social interaction, friendship and increased job prospects. Wheelchair Basketball promotes a more cohesive community especially at grass roots level. Research shows that such sports can deter antisocial behaviour; keeping young people busy and out of trouble, it makes young people feel empowered, meets the need that young people have for risk taking, it increases feelings of connectedness, it fosters teamwork-the positive benefits are endless. "Develop sporting opportunities for young people to help them foster a sense of their value to society and to help tackle problems of youth crime"(Crabbe, 2000). Many great athletes from the UK have spoken publicly about how sport probably helped keep them away from criminal activities.

Evidence in both throughput and increases in membership through the pilot programme have demonstrated a high percentage of people from a BME community. Three examples of high BME participation in the London Development Programme are clubs in Brixton, Redbridge and Hackney where the percentage of participation is in excess of 70%.

The London Development Officer works at grassroots level in the community, developing school clubs, new clubs, Taster Days and a Young Officials/Leader programme. Change4Life Sports Clubs have become a fantastic tool for schools to engage less active young people and retain their involvement in physical education and school sport as well as a great vehicle for the deployment of young leaders and volunteers. Developing a new club BWB invests in the provision of: coaching time, court time (often a restricting factor), equipment, the development of members in to the coaching and welfare workforce and facilitating the relationship with the county sport partnership and/or local authority-areas. Taster Days encourage the use of local authority facilities and accessibility to venues. The existing young officials programme is unique in the world and has been identified as a good practice model in the development of young people. Development of young officials has retained the less able to remain in the sport as both officials and players. We've also seen the transition of young officials into the senior pathway for referees, statisticians and table officials. Disabled children and young people live in different personal situations from their non-disabled counterparts, and are more likely to live with low-income, deprivation, debt and poor housing. Given the relationship between positive health, social and education outcomes and poverty and material deprivation, improving the circumstances of disabled people is crucial. Interestingly less than 10% of those living in London and participating in wheelchair basketball are female. Encouragingly, the pilot programme saw an increase in engagement of females in the sport not only as players but as coaches too. Our delivery of Wheelchair Basketball is truly inspiring; we are experts in our field and have a proven track record for innovation. A great example is Inclusive Zone Basketball. A 4 a-side game, developed to enable players who cannot participate in a full game of basketball to enjoy playing the game. The zones used enable players to be matched in their abilities within these zones. IZB can be used as a tool for breaking down barriers and stereotypes in a positive and fun way as well as portraying a positive image of disability. Allowing a whole school approach, the game links many of the strands of the National Curriculum for PE, 'games activities', Key Stages 1-4; providing cross-curricular links with Science, Literacy and Numeracy. The small-sided teams and adapted playing area enable girls and boys, both disabled and non-disabled, to participate in a fun game of basketball.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

The levels of participation will be measured at both a local and national level. The programme officer will be responsible for monitoring the beneficiaries to the programme and the throughput of activity.
 This will take place by:

- Monitoring participation at taster sessions
- Monitoring the number of people on courses
- Monitoring the activity in clubs

From a national perspective the actual membership number will be recorded and reported upon in a similar manner to the way British Wheelchair Basketball reports to Sport England.
 Excel will also be monitored through national statistics with participation in competition, training and qualifications gained.
 In both cases the quality of provision will be monitored through recording contact time with coaches, the level of the coach and the people delivering sessions.
 Views is the principal software we use to monitor participation in London.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year?
9000+

What age group will benefit? **All children & young people, Adult**

In which local authority is your organisation based?
~~Southwark~~ **Loughborough** *EGC*

Which borough(s) of Greater London will benefit from this grant?
 (if more than one, please give % for each)
Harrow, Bexley, Hammersmith, Sutton, City, Enfield, Redbridge, Newham, Tower Hamlets, Lewisham, Lambeth, Kingston upon Thames, Ealing, Greenwich, Croydon

At what address will the activity be located?
Activity will be located in boroughs mentioned above. We will be promoting where ever possible, the use of local authority facilities.

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

	%		%
White - British	31	Black - Caribbean	41
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Mixed	16	Not specified	8
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Not specified	4		
Open to everyone			100

What proportion of the beneficiaries will be disabled people?
100%

18. Funding required for the project

{As Revised}

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Officer Costs	26,000	26,780	27,583	80,363
School Programme	3,000	3,000	3,000	9,000
Club Development Programme	5,000	5,000	5,000	12,500
Taster Days	7,200	7,200	7,200	21,600
Young Officials and Leaders	8,500	8,500	8,500	21,500
TOTAL	49,700	50,480	51,283	151,463

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Sport England Capture Programme	7,200	7,200	7,200	21,600
Whole Sport Plan	6,000	7,000	7,000	20,000
TOTAL				

What other funders are currently considering the proposal?

Funders	£
Youth Sport Trust School Grant	15,000
Course income	8,000
TOTAL	23,000

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Programme Officer Gross Salary + NI+P	26,000	26,780	27,583	80,363
TOTAL	26,000	26,780	27,583	80,363

20. Funding requested from the Trust (continued)

When will the funding be required?

01/09/2013

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

The aim of the programme is to develop self sustainable and self funding clubs throughout London with continued support from British Wheelchair Basketball. Also enabling each club to access local authority grants.

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

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee

Name: Nicky Pemberton

Organisation: The Lord Taverners

Address:

Head of Foundation
The Lord Taverners
10 Buckingham Place
London
SW1E 6HX

Tel: 020 7821 2828

E-mail: Nicky.Pemberton@lordstaverners.org

Declaration on behalf of applicant organisation

I, CHARLIE BETHEL (your name)

am an authorised representative of

BRITISH WHEELCHAIR BASKETBALL (your organisation)

within which I am CHIEF EXECUTIVE (your position)

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

Signature Charlie Bethel Date 20th JUNE 2013

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

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MEETING: 09/01/2014

Ref: 11988

ASSESSMENT CATEGORY - Bridging Communities

Paddington Development Trust

Adv: Jenny Field

Amount requested: £80,000

Base: Westminster

Benefit: Westminster

Amount recommended: £80,000

Purpose of grant request: For our continued delivery of community development in Queen's Park - support to the new Community Council and extending our reach and development of active citizens.

Background

Paddington Development Trust (PDT) was established in December 1997 to actively engage in the economic, environmental and social regeneration of the North Westminster area. It is one of a national network of development trusts across the country and is a member of Locality.

It has a strong track record in providing opportunities for "active citizens", working alongside local residents in delivering a wide range of projects and neighbourhood forums, ranging from health information to provision for under 5's. It has established the first Community Council in London, with powers to levy local taxes. It also provides employment opportunities and business start-up advice for unemployed people and a youth service, delivering youth activities, after-school provision and holiday schemes for children and young people aged from 8 to 25 years.

Funding History

You have funded PDT on two previous occasions. It was one of the exemplar projects of your Fear and Fashion initiative, working in partnership with Working with Men, with a grant of £55,000 approved in July 2007. In December 2010, you approved a grant of £120,000 over three years (3 x £40,000) towards a civic engagement programme. That grant is due to end in March 2014 and the application before you requests funding to continue this project for a further two years.

Current Application

Your grant has funded a Neighbourhood Manager in Queen's Park who has recruited, trained and supported a diverse cohort of 70 - 80 "active citizens" engaged in various aspects of PDT's work. This has included the local campaign to establish London's first Community Council as outlined above. This involved extensive, regular consultation over several months.

In addition, residents have been actively involved in running a befriending project for vulnerable groups, producing a regular newsletter, organising

an annual gardens competition and the Queen Park Annual Festival. PDT's Queen's Park has also been involved in the Spice Londoner Time Credits project. This is a new model of volunteering that you are currently supporting as a Strategic Initiative whereby volunteers earn time credits which can be exchanged for trips, events, entertainment or recreational facilities.

Building on the success of the work taking place in Queen's Park PDT received a one-off grant of £120,000 last year from the Department for Communities and Local Government under its Neighbourhood Community Budgeting programme. This has enabled PDT to work with local residents in the co-design and co-production of local services with a particular focus on early year's provision. Funding was also secured from Westminster NHS to enable PDT to recruit a Community Health Champions Team comprising 15 volunteers who use their networks to connect friends, families and neighbours with local services and spread information about health and wellbeing. In return, the volunteers receive training, support and guidance to pursue their chosen career path.

You are asked to enable PDT to maintain the momentum of its work in Queen' Park by continuing to support the salary costs of its development work for a further two years. This would enable it to continue its community activities, including the befriending scheme, the community allotment scheme and the engagement of around 100 volunteers in the Spice Time Credit scheme. In addition, it is proposed to recruit, train and support a further 30 "active citizens"; develop a youth engagement group to have a strong voice in the new Community Council; support the Friends of Queen's Park Gardens in its negotiations to take over the running of it; and to maintain strong links with other voluntary and community groups, health providers, police and the local authority. It will also allow PDT to explore the development of Community Councils in other North Westminster neighbourhoods.

Financial Observations

Audited accounts for the year ended 31st March 2013 show an overall deficit of £229,102 (12% of turnover) which was financed from unrestricted funds. The charity advises that this deficit was due to the planned use of unrestricted funds to supplement a number of restricted projects.

The charity states that it aims to hold free unrestricted reserves equating to six months' worth of total expenditure, which based on the budget for 2013/14 equates to £710,190. At 31st March 2013, free unrestricted reserves stood at £320,879 equating to 2.7 months' worth of budgeted expenditure.

The budget for the current year 2013/14 shows total income of £1,388,595 all of which is confirmed. After expenditure of £1,420,376 a deficit of £31,781 is forecast.

Officer's Appraisal

Whilst three years is the maximum period that you will usually fund a project or activities, your policies allow you to fund for a further two years, work which is of strategic importance to London. PDT, whilst working at the neighbourhood level, is at the forefront of the localism agenda. The establishment of the Community Council would have been less likely to have happened without your support of the Neighbourhood Manager's salary and it is important that PDT is able to continue to provide it with support. Learning from PDT's work has the potential for wider dissemination and replication. The final year's monitoring report is due in March 2014 therefore any grant should be subject to this being received and satisfactory.

Recommendation

£80,000 over two years (2 x £40,000) as a final contribution towards the salaries and associated running costs of PDT's community development work in Queen's Park on condition that a satisfactory monitoring report is provided for the current grant.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11988

Date Received:

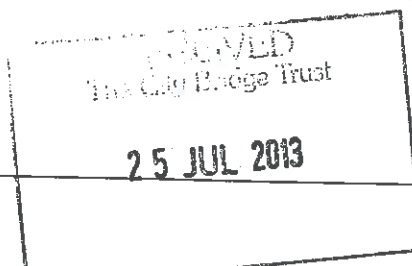
05/07/2013

Programme
Area:

02

1. About your organisation

Name of organisation applying for grant: Paddington Development Trust	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: Unit 122, Great Western Studios 65 Alfred Road London	
Postcode: W2 5EU Is this your home address? No	
Contact person: Ms Jackie Rosenberg	Position: Deputy Chief Executive
Phone: 07949108112	Fax:
E-mail: jackie@pdt.org.uk	
Website: http://www.pdt.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1080883	
Date organisation established: 14/10/1998	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Bridging Communities
Purpose for which funds are requested: (25 words maximum) For our continued delivery of community development in Queen's Park:- support to the new Community Council and extending our reach and development of active citizens.
How much funding is requested? Year 1: £40,000 Year 2: £40,000 Year 3: £0 Total: £80,000

3. Aims of your organisation

Our mission is "to facilitate social action and catalyse economic opportunities that lead to freedom from welfare dependence and growth in social and economic independence". PDT has five core values: mutuality - sharing benefits within the community; sustainability - developing a green cooperative economy; empowerment - participation of local people; financial self-sufficiency-acquiring an income generating asset base; and equal opportunities for all communities.

4. Main activities of your organisation

PDT undertakes 3 key areas of work. (1) We provide a youth service - delivering youth activities after school and during school holidays to children and young people aged 8-25. (2) We run an Employment and Enterprise service - providing support and advice for unemployed people and young people to access training or employment opportunities and providing business start-up advice to sole traders and others. (3) We run a range of Community Development and "active citizen" opportunities - working within our local community alongside local residents delivering a range of projects including - community champions - where local residents volunteer to give out health messages to their neighbours, setting up the first community council in London, working with residents and service providers to change the model of early years delivery, working with local residents to set up Neighbourhood Forums, Community festivals and newsletters. We also run a number of voluntary and community sector forum where local agencies come together to share information and meet with service providers to support partnership working.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
7	23	13	80

6. How do you support your volunteers?

Through the implementation of our policy we ensure that all volunteer receive induction, support and supervision sessions and are given clear responsibilities and tasks. We also link them into the Time Credit programme so they can receive Time Credits for their time.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	10 years

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: March

Year: 2013

Income received from:	£
Voluntary income	1,530,533
Activities for generating funds	320,417
Investment income	1,364
Income from charitable activities	0
Other sources	0
Total Income	1,852,314

Expenditure:	£
Charitable activities	1,840,130
Governance costs	6,900
Cost of generating funds	234,386
Other	0
Total Expenditure	2,081,416
Net (Deficit)/Surplus:	(229,102)
Other Recognised Gains/(Losses)	0
Net Movement in Funds	(229,102)

Asset position at year end	£
Fixed assets	17,196
Investments	0
Net current assets	320,879
Long-term liabilities	0
*Total A	338,075

Reserves at year end	£
Endowment funds	338,075
Restricted funds	0
Unrestricted funds	0
*Total B	338,075

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
74%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Our balances were reduced as at 31st March 2013, following a strategic decision to sustain certain key posts. For year ending 2014 we predict a modest deficit and are taking the decisions needed to ensure we break even from 2014 onwards.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	01/11	Ref:	10364	Grant received:	£105,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	
Month/Year:		Ref:		Grant received:		OR application rejected?	

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i)			
(ii) Westminster City Council	1,965,336	2,230,801	694,585
Royal Borough Kensington & Chelsea	100,000	131,422	174,256
(iii) London Council's /ERDF	595,121	1,013,731	296,305
(iv) NHS Westminster PCT	145,141	425,929	101,000
(v) Cross River Partnership		109,060	
London Development Agency (LDA)	145,610	339,234	386,290
(vi) GLA - Notting Hill Carnival	275,000	214,810	179,566
Skills Funding Agency	164,608	122,122	61,184

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
Dolphin Square Charitable Trust	5,130	2,795
Tudor Trust		35,000
Wates Foundation		30,000
Esmée Fairbairn		40,000
Harriet's Trust		10,000
First Light	38,715	

14. What steps is your organisation taking to reduce its carbon footprint?

The following is taken from our Environmental Policy:

- promote environmental awareness among our employees and encourage them to work in an environmentally responsible manner,
- train, educate and inform our employees about environmental issues that may affect their work,
- reduce waste through re-use and recycling and by purchasing recycled, recyclable or re-furnished products and materials where these alternatives are available, economical and suitable,
- promote efficient use of materials and resources throughout our premises including water, electricity, raw materials and other resources,
- purchase and use environmentally responsible products accordingly,
- communicate our environmental commitment to clients, customers and the public and encourage them to support it,
- strive to continually improve our environmental performance and minimise the social impact and damage of activities by periodically reviewing our environmental policy in light of our current and planned future activities.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

In order to provide the right information, please refer to guidance note 15 before completing this section.

Funding will support the costs of 2 key members of staff working in Queen's Park: - our Community Engagement and Projects Officer and our Senior Project and Partnership Manager. It will also support some PDT management and overheads.

City Bridge has contributed to our work in Queen's Park for the past 2 years. Our current grant ends in March 2014. This is 2-3 months before the first community council in London is elected in Queen's Park in May/June 2014. It is clear that the council and wider community will need on-going support and assistance for at least a couple of years to bed down and establish itself. The new council will not have enough revenue to sustain these 2 workers. However, their role in coordinating resident activity and engagement across a host of projects is absolutely crucial to the sustainability of this work. Funding from City Bridge will enable a huge amount of our current activity to continue and ensure a strong and vibrant start to the new council. Activities and outputs will include:-

Identification and support of a further 30 diverse and representative local Queen's Park residents to actively engage in their area.

Provision of a coaching and empowerment training programme.

Sustain and support the active involvement of up to 100 diverse local residents to undertake volunteering activities.

Provision of on-going support and advice as requested to new Community Council including policy and procedural development.

To build on success of Community Budget and Community Health Champions and expand across North Paddington where possible and where funding allows.

Quarterly community newsletter to every household, community web-site and blog and annual summer festival and fire-works display.

Support to Friends of Queen's Park Gardens in negotiating running of the local park

The managing of the local community allotment scheme, befriending service for elderly residents, establishment of youth engagement plan to ensure that young people in the area have a strong voice on the new council.

Support and advice to "Tell It" parents group.

Links with and building of the Spice Time Credit scheme.

Links and partnership working with other voluntary and community groups, statutory partners and providers, health providers, public health, local police etc.

Evaluate, measure, record and report the real-time process and effects of the empowering process.

To disseminate the findings and outcomes to a wide audience so that lessons can be learned.

Within Queen's Park we already work with an extremely diverse group of around 70 local volunteers who support us in a host of local community activity including door-knocking, conducting community research, identifying community priorities, writing articles for the newsletter and now standing for election onto the community council. We are also running a public health funded programme - Community Health Champions - where we have trained 20 local residents to provide early years health messages. Our aim is to sustain these residents and identify a further 30-50 to get actively involved in some way or another in the local community. These residents come from a wide range of ethnic and social backgrounds.

Through our partnership with Spice, all our volunteers can secure Time Credits for their efforts within the community.

In keeping with all our work, PDT links all our activity into the wider community - supporting other local community projects, building local capacity and encouraging innovation and partnership working. Our activities and priorities over the next few years will be informed by the views of the shadow and then elected Community Council.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

PDT has retained our relationship with the University of Westminster (UoW) who, through their Leadership and Development Department, continue to provide the content and accreditation for the coaching and empowerment training programme and the support to enable us to conduct effective and legitimate qualitative research and evaluation.

Alongside this formal external evaluation we also intend to undertake our own monitoring and evaluation to include: (i) an evaluation of whether individual residents feel empowered as a result of their training and support or volunteer engagement (ii) a wider evaluation of the local resident community identifying if people's perceptions of the neighbourhood and communities within it, changes over the course of the project.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year? 100 directly over 3,000 indirectly	
What age group will benefit? All	
In which local authority is your organisation based? Westminster	
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Westminster	
At what address will the activity be located? In Queen's Park - Westminster	
What will the ethnic grouping(s) of the beneficiaries be?	
	%
White - British	%
White - Irish	%
White - Other (please describe)	%
Asian - Indian	%
Asian - Pakistani	%
Asian - Bangladeshi	%
Asian - Other (please describe)	%
Black - Caribbean	%
Black - African	%
Black - Other (please describe)	%
Black - British	%
Chinese	%
Other (please describe)	%
Open to everyone	100
What proportion of the beneficiaries will be disabled people? 10%	

18. Funding required for the project

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Senior Project and Partnerships officer salary x 4 days	32,400	32,400		64,800
Tax, Ni and Pension contribution	6,156	6,156		12,312
Neighbourhood Officer salary - full time	30,000	30,000		60,000
Tax, Ni and Pension contribution	5,700	5,700		11,400
Office overheads	17,500	17,500		35,000
Management and Administration overhead @ 20%	14,851	14,851		29,702
TOTAL	106,607	106,607		213,214

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
TOTAL				

What other funders are currently considering the proposal?

Funder	£
Big Lottery - Reaching Communities - larger bid	70,000
Henry Smith Charity - larger bid	65,000
TOTAL	135,000

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Contribution to salaries	33,000	33,000		66,000
Contribution to management overheads	6,000	6,000		12,000
Contribution to office costs	1,000	1,000		2,000
TOTAL	40,000	40,000		80,000

20. Funding requested from the Trust (continued)

When will the funding be required?

01/04/2014

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

We are confident that the Community Council, once fully established and secure, will be able to make independent funding bids in order to sustain much of this work. We are also hoping that more of the work we currently undertake will be able to be done on a voluntary basis by residents themselves.

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

not applicable

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee

Name: Jayne Vertkin

Organisation: Westminster City Council

Address:

Lisson Grove Health Centre, Gateforth Street
London NW8 8HE

Tel: 020 7641 5745

E-mail: jvertkin@westminster.gov.uk

Declaration on behalf of applicant organisation

I, DREW STEVENSON (your name)

am an authorised representative of

PADDINGTON DEVELOPMENT TRUST (your organisation)

within which I am CHAIR (your position)

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

Signature Drew Stevenson Date 23 July 2013

How your information will be used by the Trust

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raiseyourconcern@cityoflondon.gov.uk

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City of London

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London EC2P 2EJ

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- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

MEETING: 09/01/2014

Ref: 11991

ASSESSMENT CATEGORY - Bridging Communities

St Ethelburga's Centre for Reconciliation and Peace

Adv: Karisia Gichuke

Amount requested: £89,589

Base: City

Benefit: Several London boroughs

Amount recommended: £89,500

Purpose of grant request: To develop a support programme for emerging leaders from divided communities in London to build improved community relations and promote community engagement.

Background

It is ten years since St Ethelburga's reopened as a centre for reconciliation and peace following its destruction by the 1993 Bishopsgate bomb. The Centre's work went from strength to strength and it became renowned for work in the field of reconciliation and peace where people of all faiths and none can come together in the spirit of peace.

The Centre is a busy and well-used space hosting activities concerned with reconciliation and peace-making within London and around the world. These include facilitating discussions between people in conflict from London and wider afield; skills training workshops on reconciliation practice; public and private dialogue between people from different sides of conflicts or different religious traditions. The Centre also provides safe space and skilled facilitation for private reconciliation projects and is about to start delivering an MA course in the ethics and practice of reconciliation (in partnership with the University of Winchester). It runs a well-attended music and poetry programme, 'Listen to The World', funded by the Arts Council. It also has partnerships and collaborative projects with a number of organisations, for example it has facilitated an exchange programme over the last four years for young people from Newry (Northern Ireland) and Tower Hamlets.

Funding History

You have funded St Ethelburga's Centre for Reconciliation and Peace on two occasions in the last 10 years. In 2007 a two year grant of £45,000 was approved to develop a comprehensive training course in approaches to reconciliation and establish a learning bank to share the Centre's experience of effective reconciliation work. In 2009 a one year grant of £15,000 was given to disseminate the training course more widely.

Current Application

The current application is to develop a programme for emerging leaders from divided communities in London, to bring them together to improve community relations and promote community engagement.

Over the last two years St Ethelburga's has brought together young people from divided communities in London, often through shared cultural activities, enabling them to meet together safely and identify potential for collaboration across boundaries. It has enabled participants to work together on projects in their own community, such as a cultural event for almost 100 Turkish and Greek Cypriots, involving music, dance, and storytelling, and a series of events for over 150 people from Sudan and South Sudan who live in London. It has provided training and development support for small groups of volunteer leaders from these communities to take joint work forward under their own auspices.

This proposal's objectives are to develop this work by creating a community reconciliation resource and training programme, with a focus on four divided communities in London, three of which have tensions arising from the socio-political history in countries of origin (Greek and Turkish Cypriot, Sudanese, and Columbian) and one community in Poplar, where the initiative will focus on four local estates where there is a history of tension and violence. The Centre will develop a training programme for young leaders in these communities and stimulate and support practical community engagement projects that involve wider numbers of people from these communities. Staff from the Centre will deliver this work together with freelance associates.

Financial Observations

Audited accounts for the year ended 31 December 2012 show an operating deficit of £133,147 (42.5% of turnover), comprising £19,695 on unrestricted funds, and £113,452 on restricted activity which was due to spending funds received in prior years. Gains on investments of £15,492 were achieved, resulting in an overall net decrease in funds of £117,655. The charity's reserves policy is to hold free unrestricted reserves equivalent to three months' worth of core revenue expenditure which based on the 2014 budget equates to £39,750. At 31 December 2012, free unrestricted reserves stood at £20,441, equating to 1.5 months' worth of 2014 expenditure.

In February 2013 a new strategic plan was agreed based on a reduced staff complement, greater involvement of volunteers and associates, and a plan for financial stability which includes seeking greater financial support from membership and a new social enterprise to market unused capacity of the building on a commercial basis. This new annual appeal and social enterprise initiative should help to build up reserves by generating surpluses on unrestricted funds. The forecast for 2013 shows total income of £249,185, of which £236,885 (95.1%) had been confirmed at 30th September 2013, and a small unrestricted fund surplus of £856 (0.3% of turnover). The budget for 2014 predicts a surplus of £31,000 (10.4% of turnover), comprising a surplus of £35,000 on restricted funds partially offset by a deficit of £4,000 on unrestricted

45
funds. Total income is expected to be £330,000, of which £65,000 (19.7%) has been confirmed as at 1st November 2013.

Officer's Appraisal

The centre has become renowned for its work in the field of reconciliation and peace and has turned itself into a home for those seeking non-violent resolution to conflict of any sort anywhere in the world, from neighbourly disputes and community tension to armed conflict and civil strife. This project draws on that experience of developing practical methods for helping people build relationships across divisions and applies it directly to facilitate engagement by divided communities in London.

Recommendation

£89,500 over three years (£33,700; £27,800; £28,000) for the salary and costs of developing a programme for emerging leaders from divided communities in London to build improved community relations and promote community engagement.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11991

Date Received:

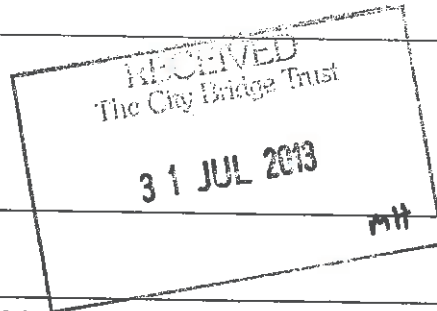
05/07/2013

Programme
Area:

02

1. About your organisation

Name of organisation applying for grant: St Ethelburga's Centre for Reconciliation and Peace	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: 78, Bishopsgate London	
Postcode: EC2N 4AG Is this your home address? No	
Contact person: Mr. Simon Keyes	Position: Director
Phone: 02074961618	Fax:
E-mail: simon@stethelburgas.org	
Website: http://stethelburgas.org	
Legal status of organisation: Company Limited by Guarantee	
If registered, please give charity number: 1121983	
Date organisation established: 01/08/1997	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Bridging Communities
Purpose for which funds are requested: (25 words maximum) To develop a support programme for emerging leaders from divided communities in London to empower them to build improved community relations and promote community engagement.
How much funding is requested? Year 1: £33,721 Year 2: £27,768 Year 3: £28,100 Total: £89,589

3. Aims of your organisation

To help people build relationships across divisions of conflict, culture and religion

4. Main activities of your organisation

Our current goals are:

To develop community reconciliation projects and training

To explore new areas of reconciliation practice, including faith based responses to conflict, disagreement success, and the use of narrative and stories

To offer young people from different communities a chance to meet and explore difference through our Gullion Link project

To enable people to experience music, poetry and stories from areas of conflict and different spiritual traditions.

The unusual restored building and The Tent offer private spaces for people to meet each other. We are expert in a range of facilitation and dialogue methods and offer skilled support for difficult conversations.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	4	7	15

6. How do you support your volunteers?

We give them clear task descriptions, supervision and support, and involve them in our decision-making through community meetings and other methods. We have a well-developed Volunteer Policy.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Owned	

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: December**

Year: 2012

Income received from:	£
Voluntary income	246,369
Activities for generating funds	59,194
Investment income	7,369
Income from charitable activities	0
Other sources	0
Total Income	312,932

Expenditure:	£
Charitable activities	423,109
Governance costs	2,315
Cost of generating funds	20,655
Other	0
Total Expenditure:	446,079
(Deficit)/surplus for the year:	(133,147)

Asset position at year end:	£
Fixed assets	1,722,804
Investments	159,882
Net current assets (liabilities)	53,469
Long-term liabilities	0
*Total A:	1,933,155

Reserves at year end:	£
Endowment funds	0
Restricted funds	1,743,245
Unrestricted funds	189,910
*Total B:	1,933,155

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
0%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

The staffing structure was remodelled in January 2013, reducing the core staff to 1 full-time and 4 part-time staff, with projects delegated to associates and volunteers. The annual budget was reduced by 40% and new forms of income generation put in place, including an appeal to members and a new social enterprise. These changes aim to create a sustainable future for the organisation.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year:	04/09	Ref:	9276	Grant received: £15,000 OR application rejected? No
Month/Year:	04/07	Ref:	7893	Grant received: £45,000 OR application rejected? No
Month/Year:	10/99	Ref:	0	Grant received: £150,000 OR application rejected? No

12. Previous funding received

Funding received by your organisation from the following sources during the last THREE years: (i) City of London (other than the City Bridge Trust)(ii) London boroughs (iii) London Councils (formerly ALG) (iv) Health authorities (v) Central government departments (vi) Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:			
	Year: 2010	Year: 2011	Year: 2012
(i)			0
(ii)			0
(iii)			0
(iv)			0
(v) DCLG	9,000		0
(vi) Awards for All	0	8,640	0
Arts Council	0	0	8,973
Faiths in Action (CDF)	6,000	0	0

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last TWO years. List source, years and annual amounts:		
	Year: 2011	Year: 2012
Tudor Trust	35,000	64,750
Rayne Foundation	45,000	45,000
Kitchin trust	19,000	19,155
Sir Halley Stewart Foundation	18,500	9,800
Kirby Laing Foundation		25,000
Camelia Foundation		7,500
Worshipful Company of Leathersellers		10,000
Worshipful Company of Saddlers		5,000
Lloyds Charities Trust		5,000

14. What steps is your organisation taking to reduce its carbon footprint?

We are gradually replacing all light fittings with low energy LED bulbs. We have an active recycling policy. We discourage private car use and the use of bottled water. we are reducing printer and paper usage

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

A striking characteristic of London's diversity is the presence of many diaspora communities from areas of conflict. These communities often reflect the divisions and tension back home and can become inward looking, isolated and hostile to each other, unable or unwilling to engage with the wider London community.

Our proposed new Community Reconciliation Project aims to work with young leaders from four such divided communities to bring people from different sides of these divisions together, build relationships and trust, and encourage practical forms of collaboration which will benefit wider society.

This project seems to fit very closely with the aims of CBT's Bridging Communities programme in that it addresses directly some of the challenges which relate to diaspora groups within the tapestry of London's diversity. It aims to tackle the specific issue of those London communities which are polarised by conflicts elsewhere in the world.

This project arises from successful pilot work over two years with Londoners from the divided Cypriot, Sudanese and Sri Lankan communities here. This has been driven by a desire from younger members of these communities to reduce tensions between these groups and find ways of collaborating to alleviate some of the problems in London and at home.

We have supported young leaders from both sides of these communities to organize cultural and dialogue events in St Ethelburga's which bring their communities together, which in turn is leading to practical collaborative work which benefits the wider community.

"Community Reconciliation" describes the four step process that has emerged from this exploratory work:

- a) Bringing together people from different sides of divided communities.
- b) Identifying and supporting community leaders
- c) Inter-community dialogue to break down divisions and identify potential for collaboration
- d) Working together on joint community engagement projects

We now wish to formalise this work into a properly structured project. Working initially with 10 young leaders we will co-create a Community Reconciliation programme which will enable these and other leaders to extend this work to larger numbers of people in the Sudanese and Cypriot communities.

This work draws on St Ethelburga's unique skills and experience, cultivated over ten years, in helping people build relationships across divisions of conflict, culture and religion, and makes good use of our specially adapted building. The project has been initiated and managed by Simon Keyes, Director of St Ethelburga's, who will remain directly involved alongside freelance associates.

Objectives

1. To create a Community Reconciliation resource and training programme with and for leaders of divided communities
2. To extend the two existing Community Reconciliation projects further into the Sudanese and Cypriot communities
3. To stimulate and support practical community engagement projects by these communities
4. To develop similar new Community Reconciliation projects in two other divided communities

Outcomes

This project will have a substantial and significant impact in two of CBT's programme outcome areas:

- a) 40 leaders from four divided communities in London will be enabled to bring together their communities to bridge their divisions. This will be reflected in improved community relations
- b) Up to 500 people from different sides of these communities will work together on new community engagement projects

Specific output measures have been developed for each of the above objectives to enable the project to be properly planned and monitored and its outcomes evaluated (See detailed proposal). The project exemplifies CBT's Principles of Good Practice with regard to user involvement, diversity, participation of volunteers. We are making progress on greening St Ethelburga's within the constraints imposed by a Grade 1 listed mediaeval building.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Monitoring structures will be established to measure progress against each of the fur project objectives, such as:

- Specification of contents of CR resource finalised
- Number of modules completed
- Numbers of leaders participating in training
- Feedback from leaders on quality and relevance of training
- Number of people attending cultural and dialogue events
- Feedback from these participants
- Similar measures for the development and delivery of community engagement projects

We will develop three primary evaluation criteria

- a) quantitative (% progress towards objectives)
- b) qualitative (degree of satisfaction from leaders and project participants)
- c) Outcome-based (tangible results under Outcomes a and b)

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year?

500

What age group will benefit? **Adult, over 16 years, over 60**

In which local authority is your organisation based?

City

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

Camden; Hackney; Kensington and Chelsea; Southwark; Tower Hamlets

At what address will the activity be located?

City; Camden; Hackney; Kensington and Chelsea; Southwark; Tower Hamlets

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

	%		%
White - British	30	Black - Caribbean	
White - Irish	10	Black - African	30
White - Other (please describe) Greek and turkish Cypriots	30	Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			

What proportion of the beneficiaries will be disabled people?

10%

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff time (Director 25%/20%/15%)	10,750	8,772	6,772	26,294
Associates (freelance staff)	8,000	10,000	12,000	30,000
NHI & pension	1,612	1,315	1,015	3,942
Volunteers expenses	1,200	1,500	2,000	4,700
Direct project costs (pump priming project activities)	2,000	3,000	4,000	9,000
St Ethelburga's management charge	3,363	3,431	3,499	10,293
Building facilities & technical support for events	4,000	6,000	6,000	16,000
IT support and website	2,000	1,000	1,000	4,000
Creation of CR resource (inline and rited manual)	3,000	0	0	3,000
Contingency (5%)	1,796	1,750	1,814	5,360
TOTAL	37,721	36,768	38,100	112,589

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Income generation from events	4,000	6,000	6,000	16,000
Fundraising target or projects	0	3,000	4,000	7,000
TOTAL	4,000	9,000	10,000	23,000

What other funders are currently considering the proposal?

Funder	£
None	
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff time (Director 25%/20%/15%)	10,750	8,772	6,772	26,294
Associates (freelance staff)	8,000	10,000	12,000	30,000
NHI & pension	1,612	1,315	1,015	3,942
Volunteers expenses	1,200	1,500	2,000	4,700
Direct project costs (pump priming project activities)	2,000	0	0	2,000
St Ethelburga's management charge	3,363	3,431	3,499	10,293
Building facilities & technical support for events	0	0	0	0
IT support and website	2,000	1,000	1,000	4,000
Creation of CR resource (online, video and printed materials)	3,000	0	0	3,000
Contingency (5%)	1,796	1,750	1,814	5,360
TOTAL	33,721	27,768	28,100	89,589

20. Funding requested from the Trust (continued)

When will the funding be required? 01/10/2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? If successful this project will be integrated into St Ethelburga's core activities and be funded through the organisation's future income generation activities
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? None required

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee	
Name:	Tim Joss, Director
Organisation:	Rayne Foundation
Address:	100 George Street London W1U 8NU
Tel:	(0)20 7487 9656
E-mail:	tjoss@raynefoundation.org.uk

Declaration on behalf of applicant organisation

I, SIMON KEYES (your name)

am an authorised representative of

ST ETHELBERGAS CENTRE (your organisation)

within which I am DIRECTOR (your position)

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

Signature  Date 20 July 2012

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust

City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

- do not send this application by fax or e-mail - unless applying online, applications must be posted to the Trust
- do send the information in the checklist - if items are missing, your application will be returned to you
- do send only the information in the checklist - if further information is required, we will contact you
- do ensure you have signed and dated this form - we cannot accept forms which have not been signed and dated
- do use the correct postage - the completed form and additional materials are likely to exceed 100g in weight

MEETING: 09/01/2014

Ref: 11961

ASSESSMENT CATEGORY - Improving Londoners' Mental Health

Ace of Clubs

Amount requested: £34,500
{Revised request: £47,400}
Amount recommended: £47,400

Adv: Sandra Davidson
Base: Lambeth
Benefit: Lambeth,
Southwark, Wandsworth &
Westminster

Purpose of grant request: To part fund the salary of our Day Centre Manager over the next three years helping us transition into being a fully self-funding organisation.

Background

The Ace of Clubs has been running for eighteen years since its humble, ad hoc, beginning in May 1995. It provides a welcoming and family-like community for those who are homeless, vulnerable and otherwise marginalised in South London. Its activities take place in the old school building of St. Mary's primary school on St. Alphonsus Road, Clapham.

The charity aims to support and transform the lives of mainly destitute or marginalised members of society. This is achieved by providing free professional advice, health care, and emotional support, so that people can make informed and responsible decisions about their lives. As well as advice, meals are served every day and addiction support is provided. Clothing, laundry and shower facilities are available and there are also educational and training opportunities, alongside leisure activities. The centre is open 9am-4pm Monday to Friday. The organisation also manages two charity shops in the Clapham area.

At the moment the charity supports over 120 people each day. The number of people accessing the services has doubled over the last year due to the recession, job losses and a severe increase in homelessness. The centre provides a much needed base for local homeless, as well as an invaluable community for a number of older people living alone in the area. At the time of your officer's visit the Centre was very busy and was clearly of great benefit to some very vulnerable people.

Funding History

None

Current Application

This application is towards the salary costs of a Centre Manager to ensure the overall safe management of the centre and general service as well as to help deliver advice and advocacy services including referral to other, specialist, agencies as appropriate. During the last year, the organisation has seen a rise in the number of clients identified as having mental health

issues. Over 780 people were seen by the staff team last year. As a result of the interventions 85% of clients have shown a positive outcome with regard to their mental health and wellbeing. The age group of attendees is mainly 25-50, most of whom are male users. The Centre Manager acts as the lead person liaising with external agencies and in offering more targeted in-house services to an increasing case load of clients. The post holder acts as a vital link between services and is often the clients' only trusted professional link working with on average 30-50 people per day. The new rules on benefits have had a profound effect, impacting on many clients who may need additional support to get back on their feet.

Financial Observations

Officer's Appraisal

The Audited accounts for the year ended 31 July 2012 show a surplus of £18,975 (10.8% of turnover), comprising a surplus on unrestricted funds of £21,018 partially offset by a deficit of £2,043 on restricted funds.

The reserves policy states that the organisation aims to hold free unrestricted reserves equivalent to three months' worth of operating costs which equates to £39,942 based on 2013/14 budgeted expenditure. As at 31 July 2012 free unrestricted reserves stood at £66,885, equating to five months' worth of current year expenditure.

The outturn for 2012/13 shows a deficit of £32,559 (17.7% of turnover) comprising deficits of £14,879 on restricted funds and £17,680 on unrestricted funds. This would reduce the free unrestricted reserves position to £49,205, equivalent to 3.7 months' worth of expenditure.

The budget for 2013/14 projects a further deficit of £31,717 (24.8% of turnover), all on unrestricted funds. This deficit would further reduce the free unrestricted reserves position to £17,488, which equates to 1.3 months' worth of expenditure. Total income is expected to be £128,050, of which £109,650 (86%) has been confirmed as at 4 November 2013.

The organisation's Director advises that he has implemented a process of restructure geared towards generating more income and reducing costs. Reorganisation of the charity shops (which is now complete) should reduce their costs, while a new bicycle-repair enterprise should generate £4-5,000 surplus per annum as its core costs are met by another funder. Longer term plans include offering some unused property assets to a developer in exchange for renovation of on-site space into flats which should generate rental income.

Officer's Appraisal

Ace of Clubs is a very busy establishment and has seen a rise in clients in the past year. The range and quality of services is impressive as it clearly understands the needs of its client group and has the skills to provide appropriate support, in the right way. As an organisation that is new to

the Trust, it did not want to appear to be asking for too much and originally only requested part of the cost for the Centre Manager's post excluding any associated costs. During assessment, it became apparent that given the close fit to your priorities, there would be value in the organisation requesting an increased level of funding to make the project viable. A revised request has been submitted and this is appended at Appendix A.

Recommendation

£47,400 over 3 years (£10,400; £18,500; £18,500) towards the salary and associated costs of a Centre Manager (30hpw), subject to the Trust not being the organisation's largest single funder in years 2 & 3.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11961

Date Received:

05/07/2013

Programme
Area:

03

1. About your organisation

Name of organisation applying for grant: Ace of Clubs	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: St Alphonsus Road Clapham London	
Postcode: SW4 7AS Is this your home address? No	
Contact person: Mr David Logan	Position: Director
Phone: 020 7720 2811	Fax:
E-mail: davidlogan@aceofclubs.org.uk	
Website: http://www.aceofclubs.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1055187	
Date organisation established: 31/07/1995	

Stamp: RECEIVED The City Bridge Trust 05 AUG 2013 MH

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Improving Londoners' Mental Health
Purpose for which funds are requested: (25 words maximum) To part fund the salary of our Day Centre Manager over the next three years helping us transition into being a fully self-funding organisation.
How much funding is requested? Year 1: £11,500 Year 2: £11,500 Year 3: £11,500 Total: £34,500

3. Aims of your organisation

To provide a welcoming and accepting family-like community for local homeless, vulnerable and marginalised people who are damagingly lonely.

To provide support and empower homeless, mentally unwell and vulnerable people in our borough to transform their lives.

To support people in making a permanent transition into healthy living and maintaining this change.

4. Main activities of your organisation

Daily provision of a welcoming family-like community which offers a wide range of transformative support services as follows:

Immediate Support includes:

Hot meals, Warm Shelter, Showers, Laundry, Health Clinic, Postal Address, First Aid, Safety & Protection from various forms of abuse, friendship.

Longer-Term In-Depth Support includes:

Welfare Advice, Housing Support, Connections & visits with Mental & Physical Health Experts, Optician, Art Club, Bike Club, Accredited and Non-accredited Training & Education Courses, Volunteering Opportunities, Money Management Support, Safeguarding Services for particularly Vulnerable people, Community for older people, Addiction Services Support, Womens Services Connections, Referral Service to appropriate external partners, Winter Night Shelter for homeless people.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
2	3	6	35

6. How do you support your volunteers?

We daily provide structured volunteer guidance, training, feedback, debriefing and encouragement. We work together with our volunteer forum granting them input and influence into how we run. We seek out their strengths and interests with them to find how they can best develop with us.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	15 Years

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: July**

Year: 2012

Income received from:	£
Voluntary income	160,727
Activities for generating funds	0
Investment income	53
Income from charitable activities	15,425
Other sources	0
Total Income	176,205

Expenditure:	£
Charitable activities	156,316
Governance costs	914
Cost of generating funds	0
Other	0
Total Expenditure:	157,230
(Deficit)/surplus for the year:	18,975

Asset position at year end:	£
Fixed assets	9,279
Investments	
Net current assets (liabilities)	81,764
Long-term liabilities	0
*Total A:	91,043

Reserves at year end:	£
Endowment funds	0
Restricted funds	14,879
Unrestricted funds	76,164
*Total B:	91,043

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
0%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

None

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:			
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

12. Previous funding received

Funding received by your organisation from the following sources during the last THREE years: (i) City of London (other than the City Bridge Trust) (ii) London boroughs (iii) London Councils (formerly ALG) (iv) Health authorities (v) Central government departments (vi) Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:			
	Year: 2010	Year: 2011	Year: 2012
(i) None			
(ii) None			
(iii) None			
(iv) None			
(v) None			
(vi) None			

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last TWO years. List source, years and annual amounts:		
	Year: 2011	Year: 2012
Harold Hood Trust	10,000	10,000
Streetsmart	10,000	10,000
Lloyds TSB Foundation	10,000	10,000
ES Dispossessed Fund / LCF	0	16,500
Peter Minet Trust		3,000

14. What steps is your organisation taking to reduce its carbon footprint?

We decreased vehicle useage as far as possible to one vehicle and are creative in our transport needs.

We train mentally unwell people in building bikes so that no one needs to use polluting transport in our staff team or clientelle. We are part of London's cycling campaigns.

We recycle 90% of our waste and, working with local council to expand our recycling facilities.

We use minimal energy and appliances.

We collect waste food from the local supermarkets and food outlets, cooking with it for 120 vulnerable people per day. It would otherwise be high-carbon waste.

We take in donations from local people from furniture to clothing to reuse or recycle it when we house vulnerable people.

We partner with recycling company Choice to ensure all our unwanted goods including electrical items are recycled.

We partner with local organic meat, fruit and veg and egg providers.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

We assessed the need for the role over 24 months through daily staff reports on member numbers, their needs, challenges and progress. We evaluated how these progressions related to the role of centre manager - It shows to be pivotal in 95% of cases.

We assessed through member-led forums, feedback forms and sessions. Again the role showed as key to the progress made by our mentally unwell members.

Our internal reports show the number of vulnerable people in need of and engaging with our services has more than doubled in 14 months (from 700 to 1600 per month).

We have gotten 184 rough sleepers housed and supported in 24 months, 163 of whom suffered mental health issues. We provided mental health support for 780 people in 12 months.

Overall 7 out of 10 members suffer with life-altering mental health issues.

According to these assessments, the above made profound improvement on the mental health of 3,500 regular members. 85% said the family-like community of Ace of Clubs has improved their mental health, helping them to stabilise.

External factors like welfare reforms and cuts to vulnerable peoples services mean overwhelming numbers of people are entering poverty and homelessness.

There are increasing numbers of economic migrants and refugees in our services falling into homelessness and deteriorating mental health.

Increasing numbers of young people are coming for help, unable to find work or sustain tenancies. This results in homelessness, robbing them of purpose and leading to increasing mental health issues.

With these issues at play many people are turning to substance misuse, resulting in mental health breakdown.

The above factors are all taking effect on the mental health of 75% of our members.

The work will be delivered by our Centre Manger who will:

- run weekly mental health programme
- link between mentally unwell members and mental health services.
- develop partnerships increasing our capacity to help each individual.
- oversee administration.
- delegate to staff/volunteers,
- oversee training & support programmes

The projects 4 clear objectives for grant duration are as follows:

1. To see more homeless and transient people and rough sleepers in touch with mental health services and reporting improvements in well-being
2. To see more people with mental health problems successfully managing to live independently or in supported accommodation.
3. To see fewer older people lonely with depression and more people reporting improvements in well-being
4. To see more offenders receiving help and support with improved mental health.

We will introduce a weekly programme of Mental Health Assessments, Support Groups including restorative classes and activities, Counselling & Referral Services and a Cycling Club. Outcomes will be reported daily to describe the impact of our project, recording improvements in members' mental health due to the development of these outputs.

We are the right organisation to deliver the work as we have the fully trained and highly experienced staff. 90% of our members engaging daily are mentally unwell. We have a unique relationship with these people where they respond to our support.

The project will improve the mental health of Londoners by providing them with purposeful and empowering activities boosting their skills and self-esteem. It will help engagement with others, working in teams and linking into Mental Health Services. We provide a supportive community to play an active role in.

The project meets Principles of Good Practise with Mental Health, involving members in planning through member forums, welcoming all people with our open door policy, valuing diversity. We value and support volunteers, involving them in decisions and giving structured feedback.

Centre Manager Job description attached. Rate of Pay: £21,500 PA.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Monitoring:
 In our daily, monthly and annual reports we will
 -Record the number of people attending mental health assessments and meetings here at our centre
 -Record number and progress of referrals to specialist mental health services.
 -Build case studies for each person plotting their progress
 In our monthly reports we will
 -Collect feedback through forms and face to face conversations with our members and our members forum to learn how their mental health has been improved.
 Evaluation:
 We will then interpret the monitoring data with the help of our nurse and our borough's partnering mental health team to determine both an internal and external perspective on the projects value and success - Looking at numbers/percentages of people improving through it.
 We will provide evaluation questionnaires to each members to have them assess the value and impact of the project on their mental health.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year? 5,000			
What age group will benefit? Adult, over 60, over 16 years			
In which local authority is your organisation based? Lambeth			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Lambeth; Southwark; Wandsworth; Westminster			
At what address will the activity be located? Clapham in Lambeth			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	30	Black - Caribbean	10
White - Irish	10	Black - African	10
White - Other (please describe) 20% White European		Black - Other (please describe)	
Asian - Indian	5	Black - British	10
Asian - Pakistani		Chinese	5
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			Yes
What proportion of the beneficiaries will be disabled people? 20%			

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Ace of Clubs Day Centre Manager Salary	21,500	21,500	21,500	64,500
TOTAL	21,500	21,500	21,500	64,500

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Fundraising Events & Activities	0	7,000	0	7,000
Streetsmart	10,000	0	0	10,000
TOTAL	10,000	7,000	0	17,000

What other funders are currently considering the proposal?

Funder	£
No other applications currently out for this	
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Part Funding of Day Centre Manager Salary	11,500	11,500	11,500	34,500
TOTAL	11,500	11,500	11,500	34,500

20. Funding requested from the Trust (continued)

When will the funding be required? 07/10/2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? If we receive this grant it will give us time and resources to grow regular donors, grow our retail and social enterprise profits by 167%, develop our property to produce significant income, continue application for future grants, continue increasing service efficiency making more money available for this. In 3 years we will be fully self-funding.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? No consents are required

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee
Name: Kate Moralee
Organisation: London Community Foundation (LCF)
Address: London Community Foundation, 357 Kennington Lane, London SE11 5QY
Tel: 020 7582 5117
E-mail: kate@londoncf.org.uk

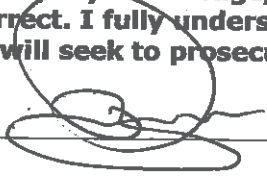
Declaration on behalf of applicant organisation

I, DAVID LOGAN (your name)

am an authorised representative of
ACE OF CLURS (your organisation)

within which I am DIRECTOR (your position)

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

Signature  Date 15.7.2013

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust

City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

- do not send this application by fax or e-mail - unless applying online, applications must be posted to the Trust
- do send the information in the checklist - if items are missing, your application will be returned to you
- do send only the information in the checklist - if further information is required, we will contact you
- do ensure you have signed and dated this form - we cannot accept forms which have not been signed and dated
- do use the correct postage - the completed form and additional materials are likely to exceed 100g in weight

18. Funding required for the project

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Centre & Welfare Manager Salary	21,500	21,500	21,500	64,500
Direct Project Management Cost	2,500	2,700	2,900	8,100
Overhead Costs (e.g. Utilities, Rent)	2,100	2,200	2,350	6,650
Training Costs	1,000	1,000	1,000	3,000
Promotion/Marketing Costs	1,000	500	300	1,800
Materials Costs	500	600	700	1,800
Travel Costs	300	350	375	1,025
TOTAL	28,900	28,850	29,125	86,875

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Red Nose Day	18,500	0	0	18,500
TOTAL	18,500	0	0	18,500

What other funders are currently considering the proposal?

Funders	£
Fundraising Applications On-going	0
TOTAL	0

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Centre & Welfare Manager Salary	3,000	18,500	18,500	40,000
Direct Project Management Cost	2,500	0	0	2,500
Overhead Costs (e.g. Utilities, Rent)	2,100	0	0	2,100
Training Costs	1,000	0	0	1,000
Promotion/Marketing Costs	1,000	0	0	1,000
Materials Costs	500	0	0	500
Travel Costs	300	0	0	300
TOTAL	10,400	18,500	18,500	47,400

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MEETING 09/01/2014

Ref: 11808

ASSESSMENT CATEGORY - Older Londoners

Westminster Arts

Amount requested: £72,000

Amount recommended: £72,000

Adv: Tim Wilson

Base: Westminster

**Benefit: Westminster,
Hammersmith & City,
Kensington & Chelsea.**

Purpose of grant request: To develop Resonate, our varied multi-setting arts programme for people living with dementia and mental health issues and their carers.

Background

Westminster Arts (WA) promotes improved health and wellbeing through arts and creative learning activities. In 2008 the charity was commissioned by NHS Westminster to develop a new service, Resonate, to help people with dementia live as independently as possible for as long as possible.

Dementia is an umbrella term describing a range of neurological conditions affecting memory, mood and comprehension. It is a progressive and degenerative disease for which there is currently no cure. 700,000 – 800,000 people in the UK have a type of dementia, 1,700 of whom live in the City of Westminster. As London's population ages, dementia is becoming more commonplace, and NHS Westminster forecasts the number of dementia patients in its own borough will rise to 2,600 by 2050.

Arts activities have been shown to help slow down the progress of some forms of dementia, and to improve the quality of life for people with the condition. WA developed Resonate for patients at all stages of the disease, and in a variety of residential settings. The programme was prepared in collaboration with public health professionals and developed in support of the National Dementia Strategy. As well as working with people experiencing dementia, WA also offers a number of complementary services for their families and carers.

Funding History

You have not previously funded Westminster Arts. WA withdrew an application in 2012 in order to update its charitable objects and strategic plan. This process is now complete, and the current application reflects the charity's new focus.

Current Application

WA seeks your support to expand its Resonate programme within Westminster and into neighbouring Kensington & Chelsea, and Hammersmith & Fulham. The charity's proposed tri-borough approach has been designed to correspond with changes in NHS commissioning which, in this area of London, is no longer at the individual borough level.

WA aims to support 320 people each year through activities in community centres, residential care settings, and domestic homes. Beneficiaries will continue to be identified through WA's connections with Community Mental Health Teams and Housing Associations, as well as through a formative GP network who the charity is engaging via its new Arts on Prescription project.

As a result of the condition, most beneficiaries will be in their late 70s or older, but the charity would also like to offer its services to those in their 60s who are affected by early onset dementia. Carers, many of whom will be older people themselves, will also be able to participate in the programme and WA aims to provide these beneficiaries with opportunities to learn practical skills that help manage the care of the patient.

Financial Observations

Independently examined accounts for the year ended 31st March 2013 show an overall deficit of £29,073 (36%), comprising a deficit of £50,116 on unrestricted funds partially offset by a surplus of £21,043 on restricted funds. The unrestricted deficit arose from a substantial fall in unrestricted income, a consequence of the decision by Westminster City Council, previously the charity's largest donor, to discontinue all arts funding across the borough. As a result, WA made its Director redundant, leaving it with limited fundraising capacity.

The charity's reserves policy is to hold sufficient funds to cover redundancy and all wind up costs should such an eventuality be reached, which the organisation has calculated as £5,500 (equivalent to 23 days' worth of current year budgeted expenditure). At 31st March 2013, the charity held £4,698 in free unrestricted reserves (equivalent to 19.5 days' worth of current year budgeted expenditure).

The forecast for 2013-14 shows a deficit of £15,884 (22% of turnover), comprising £18,384 on restricted funds, partially offset by a surplus of £2,500 on unrestricted funds. The organisation's total income for 2013-14 is expected to be £72,200, of which £63,950 (88.6%) has been confirmed as at 31st October 2013.

Officer's Appraisal

Services addressing the consequences of dementia are timely given the Prime Minister's recent announcement to double the funding spent on

research into a possible cure for this disease. Despite the recognised value of WA's work with dementia patients, borough-wide commissioning changes have had a negative impact on the organisation's finances. The decision by the council to discontinue all arts funding across the borough resulted in the loss of core (unrestricted grant) and the need to trim all unrestricted expenditure, including that related to the charity's director.

With only one operational staff member remaining, the charity's management is currently being delivered by the volunteer trustees. They have identified future income opportunities through relationships with the local clinical commissioning group (CCG), and the potential to expand the Resonate service to the new tri-borough area of Westminster, Kensington & Chelsea, and Hammersmith & Fulham. A decision from the CCG is not, however, expected until the April 2014, and you therefore have the opportunity to play an important role providing 'bridging' finance alongside the other funders mentioned in section 18 of WA's application.

Recommendation

£72,000 over three years (£17,000; £25,000; £30,000) towards Westminster Arts' Resonate programme, on the condition that the balance of funding is raised.

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MEETING : 09/01/2014

Ref: 11986

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

Shoreditch Trust

Adv: Karisia Gichuke

Base: Hackney

Benefit: Hackney

Amount requested: £125,800

{Revised request: £132,816}

Amount recommended: £132,700

Purpose of grant request: Funding towards the Blue Marble Training programme to support care leavers and ex-offenders to develop skills and access opportunities for fulfilling careers in food.

Background

Shoreditch Trust (ST) is a charity formed in 2000 to support communities to address the causes of disadvantage in the most deprived areas of the London Borough of Hackney, through community regeneration enterprises. It tackles a range of issues in a multidisciplinary way towards four strategic priorities (i) addressing health inequalities; (ii) skills development through work based training for young adults and those who are long term unemployed; (iii) enriched living and learning to improve the quality of life of residents, such as London Children's Book Swap, Shoreditch Festival, and Starlit Children's Literature festival; (iv) and supporting enterprise and facilitating small business growth by providing incubator workspace for the creative industry and through this connecting young people to careers in the creative economy and social enterprise sector. The charity's fixed assets all contribute towards the delivery of these charitable outputs.

Funding History

No previous funding history.

Current Application

The proposal is for ST's Blue Marble Training programme, which supports adults and young people to develop skills, gain qualifications and access opportunities to achieve careers in food and hospitality. The programme exclusively targets care leavers and ex-offenders, in recognition that they are disproportionately affected by a lack of access to the labour market and face multiple barriers that hinder the transition to living independently. 2011 census data for Hackney showed that 21% of the borough's working age population was claiming benefits compared with 14.3% across London, with a 75% increase in JSA claimants under 25 years old, over twice the national average.

On the positive side, however, catering is a key growth sector in east London. The Council's 'Skills Strategy for Hackney' (2009) highlights the growth in employment in the hotel and restaurant sector between 2000 and 2006, and projects increasing growth during 2006-14. At the same time the report highlights the shortage of skilled chefs in the borough.

The training will predominantly take place at Waterhouse Restaurant – ST's social enterprise training restaurant where, unusually, trainees are exposed to a commercial, customer-facing, environment from the outset. It will operate across three tiered levels offering a clear route of progression into the labour market. There will be a rolling intake at foundation level, to offer a two week 'taster' developing core practical skills such as knife work, stock making, achieving a City and Guilds accredited certificate. It is anticipated that a minimum of 52 would go through this stage. The majority then progress to the 'intermediate' stage offering over 100 training hours in professional kitchens, and opportunities to gain further qualifications (e.g. in hygiene). The duration depends on the individual but normally lasts approx. 3-4 months. The advanced level training lasts around 12 months, and offers participants training placements in a restaurant, accredited qualifications, employability tasks, seminars and field trips. ST works closely with referral partners and provides pastoral support alongside individual skills training and personal development opportunities to aid successful transition into independent living.

The grant will pay for the salary of the lead facilitator and a proportion of project costs. Since submitting the original application to City Bridge Trust the organisation has restructured how the project is delivered and a new budget reflecting this is appended. The amount requested has also been amended following discussion with the organisation and the new amount requested (shown as highlighted items within the appendix and totalling £132,816 over three years) is reflected in this assessment.

Financial Observations

Audited accounts for the year ended 31 March 2013 show a deficit of £115,604 (5% of turnover), comprising £445,811 on restricted funds partially offset by a surplus of £330,207 on unrestricted funds, which includes a gain on disposal of fixed assets of £503,474. The charity's reserves policy is for unrestricted reserves to be held at a level equivalent to three months' worth of expenditure, which based on the current year budget equates to £395,274. At 31 March 2013 free unrestricted reserves were £397,354 ahead of this target at £792,628, equating to 6 months' worth of total expenditure. The budget for the current year 2013/14 shows total income of £1,571,052 of which £1,437,552 (91.5%) has been confirmed. After expenditure of £1,581,098 an overall deficit of £10,046 (0.6% of turnover) is anticipated, comprising a deficit of £200,476 on unrestricted funds partially offset by a surplus of £190,430 on restricted

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funds. The unrestricted fund deficit of £200,476 would reduce the free unrestricted reserves position to £592,152 at 31 March 2014, equivalent to 4.5 months' worth of expenditure. The budgeted expenditure of £1,581,098 for 2013/14 is £858,496 (35%) lower than expenditure of £2,439,594 in 2012/13. The charity says that it had to reduce expenditure due to no longer receiving regeneration funding from the government's New Deal for Communities Programme, which supported some of England's most deprived neighbourhoods.

Officer's Appraisal

This project provides ex-offenders and care leavers with routes into employment in the food and hospitality industry. There are very few opportunities for this demographic to access training and development that also tailor to individual need and provide high-quality pastoral support alongside the skills training to aid a successful transition to independent living through stable employment. Key to this particular programme's success is the Waterhouse Restaurant, established as a social enterprise by Shoreditch Trust in 2008, which is open to the public and provides trainees with real industry experience.

Recommendation

£132,700 over three years (£43,000; £44,000; £45,700) towards a full time Lead Facilitator and the running costs of Blue Marble Training programme to support care leavers and ex-offenders to develop skills and access opportunities for fulfilling careers in food.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11986

Date Received:

05/07/2013

Programme
Area:

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1. About your organisation

Name of organisation applying for grant: Shoreditch Trust	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: Units 1-2 Waterhouse 8 Orsman Road London	
Postcode: N1 5QJ Is this your home address? No	
Contact person: Ms Jacqui Roberts	Position: Chief Executive Officer
Phone: 08442252051	Fax:
E-mail: info@shoreditchtrust.org.uk	
Website: http://www.shoreditchtrust.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1086812	
Date organisation established: 09/12/1999	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) Funding towards 2 x Blue Marble Trainer salaries to support care leavers and ex-offenders to develop skills and access opportunities for fulfilling careers in food.
How much funding is requested? Year 1: £41,000 Year 2: £41,870 Year 3: £42,870 Total: £125,800

3. Aims of your organisation

Shoreditch Trust is a charity and a company limited by guarantee, originally established through the Government's New Deal for Communities programme in 2000.

Shoreditch Trust supports and empowers communities to address inequality and exclusion across deprived and disadvantaged neighbourhoods in London Borough of Hackney and beyond.

By focussing on the root causes of inequality we aim to help individuals, families and communities improve their mental, physical and social wellbeing enabling citizens to take responsibility for themselves, in their own spaces across the entire Hackney borough.

The Trust delivers a holistic community wellbeing programme across priority areas; Skills for Life, Enriched Living and Learning, Addressing Health Inequalities, Financial Inclusion and Enterprise Support.

In addition to targeted project delivery Shoreditch Trust manages a mixed asset portfolio including four Business Incubator Workspace Schemes, a Healthy Living Centre, Waterhouse Restaurant and Conference Centre.

4. Main activities of your organisation

Shoreditch Trust delivers a holistic Community Wellbeing programme maximising synergy across priority areas;

1. Tackling Health Inequality - adopting a person centred approach to improve physical and mental wellbeing . Projects include; Smoking Cessation services, Bump Buddies ante-natal support for vulnerable women, Peace of Mind therapies and Community 'grow, cook and eat' workshops.
2. Strengthening Skills for Life - working with those severely disengaged from the labour market to offer work based training opportunities in key growth industries. Projects include; Creative Mentoring to connect young people with Shoreditch creative and tech companies, Blue Marble Training to nurture and train chefs.
3. Enriched Learning and Living - improving quality of life offering experiences that facilitate enjoyment, enrichment and raised aspirations. Projects include; Elders Christmas Lunches, StarLit Children's Literature Festival and Shoreditch Festival.
4. Embedding Financial Inclusion in the Trust programmes, working with partners to widen access to appropriate financial services, and supporting individuals to make well informed financial decisions.
5. Supporting Enterprise - Projects include; four Business Incubator Workspace Schemes, a Healthy Living Centre, Waterhouse Restaurant and Conference Centre.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
15	23	8	70

6. How do you support your volunteers?

Shoreditch Trust manages a dedicated 'Hackney Shares' volunteer time bank programme. It is a trading network of skills, resources and assets from individuals and organisations where the currency is time rather than money. The programme provides an intelligent mechanism to broker and sustain volunteer relationships.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Owned	

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **31** Month: **March**

Year: **2013**

Income received from:	£
Voluntary income	65,838
Activities for generating funds	145,545
Investment income	126,423
Income from charitable activities	1,504,660
Other sources	481,526
Total Income	2,323,990

Expenditure:	£
Charitable activities	2,320,506
Governance costs	67,834
Cost of generating funds	51,254
Other	0
Total Expenditure	2,439,594
Net (Deficit)/Surplus:	(115,604)
Other Recognised Gains/(Losses)	0
Net Movement in Funds	(115,604)

Asset position at year end	£
Fixed assets	6,671,094
Investments	31,038
Net current assets	804,930
Long-term liabilities	1,594,324
*Total A	5,912,738

Reserves at year end	£
Endowment funds	0
Restricted funds	5,120,110
Unrestricted funds	792,628
*Total B	5,912,738

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
20%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

None

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year: 04/10	Ref: 9830	Grant received: £0	OR application rejected? Yes
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i) The Barbican	0	0	3500
(ii) London Borough of Hackney	44982	397722	525762
(iii)			
(iv) City and Hackney Primary Care Trust	350903	782840	866450
(v) Dept Communities & Local Government	3861857		
(vi) Arts Council England	20000	0	13599

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
Big Lottery	39434	168321
Harbour Foundation	15000	
Action for Children	9139	
Harold Hyam Wingate Foundation	6500	
British Heart Foundation		4995
SAE Education		9705

14. What steps is your organisation taking to reduce its carbon footprint?

Shoreditch Trust comply and exceed the requirements of available environmental legislation to be an exemplar of excellence in environmental management.

Waterhouse Restaurant was awarded Three Star Sustainability Champion status (83%) from the Sustainable Restaurant Association in February 2012.

Initiatives include :

In house production of filtered bottled water on-site, eliminating emissions from mineral water transportation.

Cooling and heating provided by an energy efficient fresh air displacement ventilation system through panels made of woven wicker.

An onsite food dryer macerator. The machine reduces the volume of food waste by over two-thirds, transforming it into a dried, stable material that will biodegrade a lot more slowly. The dried material is used in Shoreditch Trust's growing areas, slowly releasing nutrients as it rehydrates naturally.

Vertical salad wall. Plants are grown vertically in our patented modular, hydroponic-fed system. The benefits of green walling include reduced thermal loading on buildings and natural air filtration.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

In order to provide the right information, please refer to guidance note 15 before completing this section.

Shoreditch Trust's Blue Marble Training programme supports and nurtures care leavers and ex-offenders to develop skills, gain qualifications, experiences and access opportunities to achieve fulfilling careers in food and hospitality.

Objectives :

- Increased engagement in education and training
- Reduction in youth offending (and re-offending)
- Sustained transitions from care to independent living
- Increased peer to peer mentoring in communities with endemic underemployment

Ex-offenders and care leavers are disproportionately affected by a lack of access to the labour market in Hackney, facing multiple barriers that hinder their transition to independent living. The risk of entrenched social exclusion, offending or re-offending is high as a result.

Hackney is ranked the second most deprived local authority area in England and Wales (2010 Index of Multiple Deprivation) with high levels of youth unemployment. However, catering is a key growth sector in east London and the Council's Skills Strategy for Hackney (2009) highlights the shortage of skilled chefs in the borough. Blue Marble Training seeks to meet this need by training chefs from ex-offender or care leaver backgrounds.

BMT operates across three tiered levels -- Foundation, Intermediate & Advanced - offering a clear route of progression into the labour market. The training takes place at Waterhouse Restaurant, Shoreditch Trust's social enterprise training restaurant, and its Healthy Living Centre. Trainees are exposed to a commercial, customer-facing environment from the outset.

All trainees start at the Foundation Level and are supported by the Head Chef Trainer and Training & Engagement Coordinator to progress to the Advanced Level. The hierarchical structure demonstrates a transparent route of progression, rewards skills development and encourages mentoring relationships between trainees.

Shoreditch Trust works with east London partners including probation and statutory services to recruit at least one new trainee every week. We operate a rolling intake (rather than academic or financial calendars) across the year. This allows ex-offenders and care leavers to join the programme when their social workers or probation officers recommend they are ready to commit to, and benefit from, the training opportunities on offer.

Each year, BMT works with a minimum of 52 ex-offender or care leaver trainees. Since 2009, 75% of all BMT trainees (>150 individuals) recruited have been ex-offenders and over a quarter have been in care. Of those completing 12 months on the programme, 91% have remained employed in food & hospitality 6 months after leaving.

Shoreditch Trust is a charity that provides specialised pastoral support alongside individual skills training and personal development opportunities to aid successful transition to independent living.

Trainees are challenged to see themselves as leaders in the kitchen and in the community. BMT integrates a strong social and ethical message into its work, emphasising the important and positive impact good food and food businesses have in the local community. Advanced Level trainees are offered the opportunity to gain teaching qualifications, to design and improve course modules and are expected to cascade their learning to new trainees.

Advanced Level trainees are paid a living wage whilst furthering their training. In contrast to other apprenticeship and college based vocational courses, this assists greatly in enabling trainees to achieve independent living; financial stability, fiscal responsibility and budget management skills.

Environmental sustainability is a key focus of Blue Marble Training. Trainees gain knowledge of 'field to fork' processes, high ethical standards and key skills to limit environmental impact in the catering and hospitality industry.

BMT benefits from outstanding training facilities and experienced training staff led by the Head Chef Trainer and supported by the Training Coordinator. We seek support to continue to provide educational and employment opportunities for young care leavers and ex-offenders.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Shoreditch Trust records and analyses datasets to map an individual's progression through BMT and beyond. We capture; background information at application and interview, personal learning portfolios, qualifications, timesheets, work based appraisals, employment outcomes on graduating from the programme, plus tracking at a further 6 and 12 months.

BMT's curriculum and accredited qualifications meet the requirements of OFSTED's Common Inspection Framework and are assessed by a Quality Assurance Officer.

Shoreditch Trust commissions a 'Social Return on Investment' report conducted independently every two years. The last report was published in August 2012. The SROI model generated outcome mapping and determined that for every £1 invested in BMT, the social value of the outcomes created is £3.42.

Alongside independently conducted SROI evaluation, The Trust's senior management team meet with BMT training personnel on a quarterly basis to interpret monitoring data and analyse success against targets, enhancing programme delivery strategies as required.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year?

52

What age group will benefit? **Over 16 years, Adult**

In which local authority is your organisation based?

Hackney

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

Hackney 75%, Tower Hamlets 5%, Waltham Forest 5%, Newham 5%, Islington 5%, Haringey 5%.

At what address will the activity be located?

**Shoreditch Trust Healthy Living Centre, 170 Pitfield Street, London N1 6JP
Waterhouse Restaurant, 10 Orsman Road, London N1 5QJ**

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

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			100

What proportion of the beneficiaries will be disabled people?

10%

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Training Venue	20,000	20,000	20,000	60,000
Training Equipment & Course Materials				0
Foundation Level (50 x £500)	25,000	25,000	25,000	75,000
Intermediate Level (25 x £1,250)	31,250	31,250	31,250	93,750
Advanced Level (15 x £2,000)	30,000	30,000	30,000	90,000
Evaluation	6,500	6,500	6,500	19,500
Marketing - Design and Print	2,000	2,000	2,000	6,000
Seminars and Field Trips (12 x £500)	6,000	6,000	6,000	18,000
Management				0
Service Desk & Communications	9,960	9,960	9,960	29,879
Trainee Management Software Licence	1,000	1,000	1,000	3,000
Assessment and Verification Officer Services (8 x £500 per day)	4,000	4,000	4,000	12,000
Chef Trainer Salary	30,000	30,600	31,200	91,800
Training Coordinator Salary	22,000	22,660	23,340	68,000
TOTAL	187,710	188,970	190,249	566,928

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Savoy Educational Trust	13,750	0	0	13,750
LBH Virtual School for Looked after Children	20,000	10,000	10,000	40,000
Shoreditch Trust	100,000	75,000	50,000	225,000
TOTAL	133,750	85,000	60,000	278,750

What other funders are currently considering the proposal?

Funder	£
JP Getty Foundation	10,000
East London Business Alliance	15,000
Trusthouse Charitable Foundation	15,000
Worshipful Company of Cooks	20,000
TOTAL	60,000

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Chef Trainer (full salary)	30,000	30,600	31,200	91,800
Training Coordinator (50% salary)	11,000	11,330	11,670	34,000
TOTAL	41,000	41,930	42,870	125,800

20. Funding requested from the Trust (continued)

When will the funding be required? 01/01/2014
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Shoreditch Trust will continue to develop its social enterprise Waterhouse Restaurant as the home of Blue Marble Training. The restaurant has been open since 2009 and the business plan confidently projects increased income over the next three years to support BMT - alongside a limited amount of rental income through The Trust's property portfolio.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? None required.

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee
Name: Nick Corker
Organisation: Virtual School for LAC, Hackney Learning Trust
Address: Hackney Technology and Learning Centre London E8 1GQ
Tel: 020 8356 5016
E-mail: Nick.Corker@Hackney.Gov.UK

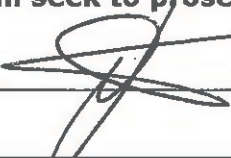
Declaration on behalf of applicant organisation

I, JACQUI ROBERTS (your name)

am an authorised representative of
SHOVEDITH TRUST (your organisation)

within which I am CHIEF EXECUTIVE (your position)

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

Signature  Date 17 JULY 2023

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust
City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

APPENDIX — REVISED PROJECT COSTINGS

BMT WH Budget Three Years

2014-15 2015-16 2016-17

Direct project costs

Salaries

Accreditation and Quality Manager	35,077	35,778	37,493
Facilitator Lead	31,730	32,365	33,917
Facilitator	23,489	23,959	25,125
Engagement Coordinator	23,489	23,959	25,125
Total salary costs	113,785	116,061	121,659

**Advanced Trainee Wages	53,787	54,862	55,960
Advanced Trainee induction	4,800	4,896	4,994
Total Trainee costs	58,587	59,758	60,954

Equipment/materials	99,000	100,980	103,000
Travel expenses	3,640	3,713	3,787
Recruitment	2,500	2,550	2,601

Total direct project costs	277,512	283,062	292,001
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Support costs

Management, oversight & supervision - CEO	24,262	24,747	25,242
Finance - budget management, payroll - FD	14,240	14,525	14,815
Administration, office management	6,847	6,984	7,124
Marketing, communications	6,525	6,656	6,789
IT, web & data management	4,847	4,944	5,043
Total support costs	56,721	57,855	59,013

Overheads

Rent, rates, utilities	63,620	64,892	66,190
IT	7,071	7,213	7,357
Training, staff development	4,500	4,500	4,500
Audit & governance	4,023	4,103	4,185
Legal & professional fees	8,800	8,976	9,156
Phones, stationery, office costs	7,103	7,245	7,390
Total overheads	95,117	96,929	98,778
Total indirect project costs	151,838	154,785	157,791

Total project cost	429,350	437,847	449,791
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Project Income

Income generated through sales & events	140,000	142,800	145,656
Virtual School-unsecured	10,000	10,000	10,000
* Accreditation	129,908	132,506	135,157
Getty Foundation-Unsecured	40,000	40,000	40,000
City Bridge Trust-Unsecured	40,000	40,000	40,000
Total Project Income	359,908	365,306	370,813

Current Fundraising Target	69,442	72,541	78,979
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MEETING 09/01/2014

Ref: 11945

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

The Switchback Initiative

Amount requested: £109,185
(Revised request: £96,578)
Amount recommended: £96,000

Adv: Joan Millbank
Base: Tower Hamlets
Benefit: East London
including Tower Hamlets,
Islington, Hackney.

Purpose of grant request: Salary and related costs for additional specialist worker providing long-term, semi-therapeutic relationships for young adult offenders, providing stability and a reduction in re-offending during resettlement.

Background

The Switchback Initiative (known as Switchback) works to keep young adult offenders from going back into prison. It provides an intensive mentoring programme that helps 18-24 year old offenders (trainees) make lasting change after release. Mentors work with each trainee to develop and progress an action plan, while acting as a constant 'anchor' amongst the different organisations and people that trainees encounter.

The need to provide long-term, intensive support for young offenders is evidenced by the high recidivism rates i.e. young people account for 1/3rd of those sentenced to prison each year and 1/3rd of the probation service caseload. With new custodial sentences costing up to £95,000 per prison place and a 21% reoffending rate amongst Switchback trainees (compared to a national average of 58%) Switchback is seeking to provide more effective and efficient ways to address youth recidivism and resettlement. Set up in 2008, Switchback has helped 54 trainees (54%) settle into work or education.

Funding History

None.

Current Application

Switchback is seeking three year funding to allow them to employ an additional (fourth) full-time mentor, together with project on-costs including trainees' expenses (food, telephone top-up and travel cards) and management costs for three years. A minimum of 10 trainees per annum will benefit through intensive one-to-one support from this person.

The Switchback programme has three stages: work within 13 prisons to identify potential trainees and support their preparation for release; on release, providing catering and front-of-house training at the Crisis Skylight Café; and then facilitating trainees' access to further training, work placements and direct employment through partnership work with

40 London restaurants. Mentor support focuses on each trainee's personal development, emotional and mental wellbeing and job-readiness. Individual goals, stability and achievements are set out, monitored and measured using a bespoke outcome framework. The relationship continues into the first month of trainee's employment and the average length of contact is nineteen months.

Switchback mentors undergo Her Majesty's Prison Service security clearance and training processes. The Switchback programme is seen as complimenting each offender's formal release and resettlement pathway. Switchback will not accept contract funding in order to maintain appropriate flexibility and responsiveness to individual trainee needs.

Financial Observations

Audited accounts for the year ended 31 December 2012 show a deficit of £152,221 (112.4% of turnover), comprising deficits of £125,702 on unrestricted funds and £26,519 on restricted funds. The charity advises that this deficit was due to planned spending on extending the staffing structure to meet the strong demand for services. This was financed from surplus unrestricted reserves.

The reserves policy states that the charity aims to hold free unrestricted reserves equivalent to six months' worth of running costs, which equates to £177,658 based on 2014 budgeted expenditure. At 31st December 2012 free unrestricted reserves stood at £174,983, equating to 5.9 months' worth of 2014 total expenditure.

The latest forecast for 2013 shows a surplus of £1,520 (0.5% of turnover) all on unrestricted funds. Total income for 2013 is estimated to be £307,916, of which £261,917 (85.1%) had been confirmed at 31st October 2013. The budget for 2014 shows total income of £390,348, of which £139,848 (36%) has been confirmed as at 28th November 2013. After total expenditure of £355,316 a surplus of £35,032 (9.0% of turnover) is anticipated all on unrestricted funds. This would increase the free unrestricted reserves position to £211,535, 7.1 months' worth of total expenditure.

Officer's Appraisal

Switchback was founded on a premise that a lack of continuity of support as well as information prevents young ex-offenders from realising the options they have. The mentor acts as a trusted ally providing intensive, tailored, support around the transition from prison to community. They work to build self-reliance and stability amongst the trainees in ways that avoid dependency. While paid mentors raise the costs of the provision the potential results are enticing. Following submission of the original proposal and costings the organisation has revised the bid in order to

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apply for three full years and to incorporate some other income now confirmed. These alternative funds will meet most of the caseload costs. The recommendation has been adjusted accordingly.

Recommendation

£96,000 over three years (£31,000; £32,000; £33,000) towards the salary and running costs of a Switchback Mentor to provide long-term, semi-therapeutic relationships for young adult offenders from London.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11945

Date Received:

04/07/2013

Programme
Area:

06

1. About your organisation

Name of organisation applying for grant: The Switchback Initiative (known as Switchback)	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: 3rd Floor, Norvin House 45-55 Commercial Street London	
Postcode: E1 6BD Is this your home address? No	
Contact person: Miss Slaney Wright	Position: Founding Director (Development)
Phone: 020 7650 8989	Fax:
E-mail: slaney@switchback.org.uk	
Website: http://www.switchback.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1125100	
Date organisation established: 21/07/2008	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) Salary and related costs for additional specialist worker providing long-term, semi-therapeutic relationships for young adult offenders, providing stability and a reduction in re-offending during resettlement.
How much funding is requested? Year 1: £27,030 Year 2: £40,469 Year 3: £41,686 Total: £109,185

3. Aims of your organisation

Switchback is an intensive mentoring programme that helps 18-24 year old offenders make real, long-lasting change after release. Our mission is to change the way that our Trainees think about and participate in society.

Switchback aims to support young adults (Trainees) to build on skills learnt in prison kitchens so that real, lasting change is possible after release. By combining an intensive mentoring relationship with a practical programme, we are able to make employment a realistic option for this vulnerable group.

4. Main activities of your organisation

A team of Switchback Mentors (SMs) build individual, unconditional, long-term and motivational relationships with a small caseload of Trainees each. SMs act as a constant, reliable anchor amongst the different organisations and people that Trainees encounter.

The Switchback programme has three stages:

Prison: Prisoners with experience of prison catering volunteer to take part. During their last three months inside, their SM visits regularly and they start planning for the Trainee's release.

Training: Trainees start at the Crisis Skylight Café in London as soon as they are released. Working in the kitchen or front-of-house, they receive professional training. Their SM helps them to learn how to make the right choices, get the help they need and take part in new experiences.

Work: We then work closely with a wide range of employers and arrange visits, work placements, mock interviews and job applications. Our support does not end once Trainees have taken the major step into work. We continue to focus on building stability in other areas of their lives to help ensure employment is sustained and rewarding into the long term.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
5	1	6	0

6. How do you support your volunteers?

Switchback chooses not to use volunteers, other than for occasional events, as we are committed to ensuring long-term, unconditional support for Trainees on our programme. The intensive nature of our work means that we believe this work should be delivered by paid staff only.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	2 years into a 4 year lease

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: December**

Year: 2012

Income received from:	£
Voluntary income	134,856
Activities for generating funds	0
Investment income	512
Income from charitable activities	0
Other sources	10
Total Income	135,378

Expenditure:	£
Charitable activities	272,119
Governance costs	8,850
Cost of generating funds	6,630
Other	0
Total Expenditure:	287,599
(Deficit)/surplus for the year:	(152,221)

Asset position at year end:	£
Fixed assets	3,804
Investments	0
Net current assets (liabilities)	198,378
Long-term liabilities	0
*Total A:	202,182

Reserves at year end:	£
Endowment funds	0
Restricted funds	23,395
Unrestricted funds	178,787
*Total B:	202,182

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?

0%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Andrew Fleming-Williams joined our board of Trustees in June 2013. There have been no other significant changes.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i)			
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
JP Getty Junior Foundation	25,000	25,000
Lloyds TSB Foundation for England & Wales	30,000	0
Esmee Fairburn (TASK grant)	15,000	10,000
Tudor Trust	25,000	0
8 grants of between £10,000 and £15,000	60,000	30,000
14 grants of up to £5,000	26,300	27,561

14. What steps is your organisation taking to reduce its carbon footprint?

Switchback undertakes a number of activities to reduce our carbon footprint. These include

- Recycling as much office waste as possible (paper, packaging, ink cartridges) through re-use and available recycling schemes.
- Only using washable cups / glasses / crockery in the office.
- Ensuring that all electrical equipment and lights are turned off when not in use.
- Encouraging and supporting all staff and Trainees to use public transport or bicycles when possible (including providing Trainees with London Travelcards for programme related activities).
- Working with the Crisis Skylight Café to support Trainees to use and understand the importance of seasonal, local and ethically sourced food (including Fair Trade goods) where possible.

We are committed to continually reviewing and amending our activities to ensure we minimise our impact on the environment in the future.

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

Need

There is an unacceptable human and financial cost to the numbers of young adults that reoffend:

- While people aged 18-24 account for 10% of the UK population, they account for a third of those sentenced to prison each year; a third of the probation service caseload and a third of the total economic and social costs of crime (Transition to Adulthood, 2010).
- More than 58% of young adult offenders are reconvicted within one year of release from prison (Hansard, 17/01/11).
- High recidivism is expensive; new custodial sentences cost up to £95,000 per prison place per year.

Switchback is committed to growing, and sustaining our work -- reaching out to more prisoners and ensuring that Switchback builds degree of structural resilience to help safeguard that service.

Delivery

The Switchback programme delivered by our team of dedicated Switchback Mentors (SMs). Each taking on a small caseload of Trainees, they build unconditional and motivational relationships and encourage and challenge Trainees to make their life more stable as they move through the prison gate. SMs provide a consistent anchor amongst all the organisations and people that Trainees encounter, and support the Trainee through a series of work placements, professional training and employment itself.

An additional SM will enable us to reach an extra 10 new young adult offenders annually. Allowing for the new SM to build their caseload and receive the training required, funding will directly support an additional 25 Trainees over the project period.

Aims and Outcomes

By December 2016, we will;

- Have recruited, trained and embedded an additional SM
- Recruit an additional 25 Trainees.
- Support over 50% of Trainees to move on to a new way of living that includes work or education.
- Achieve a reoffending rate of below 20%.

Why Switchback?

Switchback's proven model of delivery has a significant impact on the Trainees we support. It directly meets the priority area "more ex-offenders successfully resettled within the community and re-offending reduced".

- 54% of Trainees have successfully changed the way that they think about and participate in society -- sufficiently settled in work or education to sustain a new way of life.
- Our reoffending rate is a third of the national average (17% compared to the national average of 58%).
- Since 2008 we have helped an average of 13 Trainees a year secure a permanent job.

We have a strong reputation for reliability, authenticity and integrity. We have been uncompromising in our commitment to facilitating change that is both genuine and long lasting, avoiding statutory funding which would dictate programme length or outcomes for Trainees.

Principles of Good Practice

1) User Engagement

Our programme is premised on each Trainee taking control, effectively 'designing' their own programme, with Action Planning acting as a form of constant consultation. Due the nature of the beneficiaries, it is rare that past Trainees are asked to return in order to help us develop. A clear line is often drawn between Switchback and their next phase.

2) Value Diversity

Switchback's model doesn't suit every prisoner. We try to meet every eligible prisoner (aged 18-24; sentenced with three months left to serve in custody; from East, North East or South East London), and last year 24% committed to becoming a Trainee. We have no restriction on length of sentence and the only restriction on offence type is that Trainees are not sex offenders (we do not have the specialist skills required).

3) Volunteers

Due to the length and intensity of SMs' relationship with Trainees, we don't use volunteers apart from for very occasional one-off projects (e.g. running events).

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

Switchback maintains a comprehensive, bespoke 'Trainee Database' which enables us to track engagement with our programme and record all project and programme outcomes. This includes information about any reconvictions.

The database is updated weekly by SMs, who use information from Action Plans, conversations with Trainees, feedback from other relevant people (e.g. probation officers, family members) and their own knowledge.

Specific achievements and changes in stability are recorded under ten different areas of life.

Achievements are tracked using 40 "Switchback Outcomes" such as: moving into appropriate accommodation, addressing a health issue and building a positive relationship. These allow us to track progress towards Trainee's own goals.

Stability is recorded as "unstable", "stable" or "enabling" in each of the ten areas every week, giving a detailed picture of how well a Trainee is resettling.

All project outcomes and progress of our caseload will be evaluated by our Trustees every quarter.

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year? **56**

What age group will benefit? **Over 16 years**

In which local authority is your organisation based? **Tower Hamlets**

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)

Tower Hamlets (30%); Islington (20%); Hackney (20%); Other (30%)

At what address will the activity be located?

The vast majority of activity will be delivered in Tower Hamlets, however initial meetings with Trainees will take places in prisons across the South East.

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

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	

Open to everyone **100**

What proportion of the beneficiaries will be disabled people?
0%

18. Funding required for the project

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Switchback Mentor Salary	25,000	25,750	26,523	71,023
Switchback Mentor Employers NI Costs	2,417	2,490	2,563	6,866
Switchback Mentor Training Budget	300	300	300	900
Switchback Mentor Clinical Supervision Costs	900	1,250	1,300	3,150
Switchback Mentor Travel Costs (including to prisons)	885	1,335	1,375	3,300
Switchback Mentor's Caseload Action Planning Expenses	5,460	8,034	8,275	19,884
Switchback Mentor's Caseload Other Expenses	709	1,063	1,095	2,631
Switchback Mentor Telecommunications	180	247	255	682
Switchback Mentor Workstation (PC, furniture etc)	750	0	0	750
TOTAL	36,601 36,506	40,469	41,686	118,756 118,661

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Esme Fairbairn foundation	555+	8198	8433	22178
TOTAL				

What other funders are currently considering the proposal?

Funder	£
TOTAL	

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Switchback Mentor Salary	25,000	25,750	26,523	77,273
Switchback Mentor Employers NI Costs	2,417	2,490	2,563	7,471
Switchback Mentor Training Budget	300	300	300	900
Switchback Mentor Clinical Supervision Costs	900	1,250	1,300	3,450
Switchback Mentor Travel Costs (including to prisons)	885	1,335	1,375	3,595
Switchback Mentor's Caseload Action Planning Expenses	536	803	828	2,167
Switchback Mentor's Caseload Other Expenses	71	106	109	287
Switchback Mentor Telecommunications	185	247	255	687
Switchback Mentor Workstation (PC, furniture etc)	750	0	0	750
TOTAL	31,044	32,281	33,253	96,578

20. Funding requested from the Trust (continued)

When will the funding be required?

01/01/2014

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

Fundraising at Switchback is (and will continue to be) an ongoing activity which sees us receive funds from a wide range of charitable trusts and foundations and individual donors. No single donor provides more than 20% of each year's budget, meaning we are not reliant on any one source of income for our delivery.

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

N/A

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee

Name: Elizabeth Rantzen

Organisation: JP Getty Jnr Charitable Trust

Address:

1 Park Square West
London
W1 4LJ


Tel: 020 7486 1859

E-mail: elizabeth@jpgettytrust.org.uk

Declaration on behalf of applicant organisation

I, SLANEY WRIGHT (your name)
am an authorised representative of
SWITCHBACK (your organisation)
within which I am FOUNDING DIRECTOR (DEVELOPMENT) (your position)

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

Signature  Date 10/7/13

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email raiseyourconcern@cityoflondon.gov.uk

Return the completed form to: The City Bridge Trust

City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

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- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

MEETING: 09/01/2014

Ref: 11895

ASSESSMENT CATEGORY - Strengthening the Third Sector

Advice UK

Adv: Jenny Field

Amount requested: £75,042

Base: Tower Hamlets

Benefit: London-wide

Amount recommended: £75,000

Purpose of grant request: To build a stronger and more fundable Black, Asian, Minority Ethnic and Refugee (BAMER) advice organisations network, to deliver better services to these communities in London in tough economic times.

Background

Advice UK is the key co-ordinating body for independent advice providers in the UK with a membership of approximately 800 organisations, some 300 of which are based in Greater London. Services currently include capacity building services to the independent advice sector; information and training; support for money advice services; various networks and forums; and policy related work.

Funding History

Since 1996, you have supported Advice UK on three occasions, the last being a grant of £149,000 over 3 years that was approved in October 2005 towards a capacity building programme for small groups in order to increase their sustainability. This grant ended in April 2009 and has been satisfactorily monitored.

Current Application

Since 2006, Advice UK has hosted and supported the BAMER Advice Network (BAN) which comprises 43 advice services serving black and minority ethnic communities in London. For the past 5 years, 19 of these organisations have been funded by London Councils to work in partnership with Advice UK to deliver culturally and linguistically appropriate advice services to black and minority ethnic communities across greater London.

This application proposes to take this initiative to its next stage by establishing BAN as an independent organisation in its own right. The purpose of this would be to increase the Network's capacity to provide a voice for the BAMER advice sector and to develop stronger and closer working relationships amongst BAN's constituents. For example, through a peer training programme, through the development of a referrals protocol and through the establishment of a single, central system for collecting social policy data. BAN's members will benefit from increased

opportunities to form collaborative partnerships (to make joint bids for funding, for example) and will be supported in maintaining their quality assurance status; improve their monitoring and evaluation systems; and improved business planning skills.

You are asked to support the costs of a Development Consultant for three days a week, together with administration, management and running costs, in order to establish BAN as an independent charitable organisation over a two year period. One assessment question your officer asked was whether BAN itself would need to be staffed once established. Advice UK say that whilst the better resourced BAN is, the more can be achieved, it can function effectively by drawing on the skills and experience of its members and there is the will amongst the membership to make it work.

Financial Observations

Audited accounts for the year ended 31st March 2013 show a deficit of £74,791 (2.7% of turnover), comprising £39,616 on unrestricted funds and £35,175 on restricted activity.

The trustees of Advice UK consider it prudent to hold 6 months' worth of expenditure on staff and overheads in free unrestricted reserves, which based on current year budgeted expenditure equates to £397,200. Free unrestricted reserves at 31st March 2013 stood at £435,787, equating to 6.6 months' worth of staff and overhead expenditure (or 3 months' worth of total expenditure).

The 2013/14 budget shows total income of £1,737,240, of which £1,593,190 (91.7%) has been confirmed at 21st November 2013. After expenditure of £1,749,848 a deficit of £12,608 is projected, comprising £12,205 on restricted funds and £403 on unrestricted funds.

Officer's Appraisal

Advice UK is well-respected in its field and has the necessary skills and experience to establish BAN and also to ensure its membership is sufficiently trained up to sustain itself. This application meets the priority of your Strengthening the Third Sector programme to fund "work strengthening minority ethnic and refugee community organisations and encouraging their collaboration". It also complements the 'Reducing Poverty' strand of your new Investing in Londoners programmes where you have prioritised the provision of money, debt and housing advice by qualified/accredited organisations.

Recommendation

£75,000 over two years (£50,000; £25,000) towards the salary and associated running costs of a 3 day a week Development Consultant in order to establish the BAMER Advice Network as an independent organisation.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11895

Date Received:

03/06/13

Programme
Area:

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1. About your organisation

Name of organisation applying for grant: ADVCEUK	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence WB1 PO BOX 70716 LONDON	
Postcode: EC1P 1GQ Is this your home address? No	
Contact person: Mr Wesley Harcourt	Position: Senior Development Consultant
Phone: 0300 777 0107	Fax:
E-mail: wesley.harcourt@advceuk.org.uk	
Website: www.advceuk.org.uk	
Legal status of organisation: Company Limited by Guarantee -2023982	
If registered, please give charity number: Charity No - 299342	
Year and month organisation established: September 1979	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Strengthening the Third Sector
Purpose for which funds are requested: (25 words maximum) To build a stronger and more fundable BAMER advice organisations network, to deliver better services to BAMER communities in London in tough economic times
How much funding is requested? Year 1: £49,993 Year 2: £25,049 Year 3: £ Total: £75,042

3. Aims of your organisation

Advice UK aims to ensure that all people have access to free, independent, quality advice to enable them to achieve, protect and exercise their rights.

Its corporate strategic objectives are to:

1. Raise awareness and understanding of: the advice sector; the role played by diverse independent advice providers; and the value of supporting their work.
2. Improve the efficiency, effectiveness and sustainability of voluntary and community sector advice services.
3. Increase access to advice services of continued independence and improving quality.
4. Attract and generate the resources needed to become more effective in doing the above.

4. Main activities of your organisation

AdviceUK is a 2nd tier membership network, serving the independent community advice sector through:

Development Support – capacity building support tailored to meet the needs of agencies; production of monthly funding updates; health checks; governance support; strategic planning

Learning & Skills – a range of training courses and assessment for vocational qualifications

Networking – sharing sector knowledge – forums and bulletins to keep agencies up to date with opportunities and events

Campaigning & Policy work – providing a voice of independent advice to government, policy makers and funders

Influencing Change – promoting the BOLD and Systems Thinking as models to achieve change

Money Advice Support – Expert support and regulatory accreditation for members providing debt advice

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
15	2	13	0

6. How do you support your volunteers?

N/A

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	July 2014

8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2013**

Income received from:	£
Voluntary income	
Activities for generating funds	
Investment income	2,846
Income from charitable activities	2,749,221
Other sources	
Total Income	2,752,067

Expenditure:	£
Charitable activities	2,792,059
Governance costs	22,406
Cost of generating funds	2,656
Other	9,737
Total Expenditure	2,826,858
Net (Deficit)/Surplus:	(74,791)
Other Recognised Gains/(Losses)	0
Net Movement in Funds	(74,791)

Asset position at year end	£
Fixed assets	9322
Investments	10000
Net current assets	468,993
Long-term liabilities	
*Total A	506,315

Reserves at year end	£
Endowment funds	
Restricted funds	51,206
Unrestricted funds	455,109
*Total B	506,315

* Total A and Total B must be the same and should be taken from your balance sheet

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
31%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Funding from London Councils has been confirmed under a new contract to start on 1st April 2013 to March 2015, however, the level of funding has been reduced by 14.8% on the previous contract. It should be noted that in the previous funding from London Councils (figure quoted in q12 overleaf* - 71.5% of this funding was disseminated to members of the BAN network)

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Aug	/ 1995	Ref: 95-149	Grant received: £33580	OR application rejected		<input type="checkbox"/>
Month/Year: Nov	/ 1996	Ref:	Grant received: £60000	OR application rejected		<input type="checkbox"/>
Month/Year: Nov	/ 2006	Ref: 6455	Grant received: £149k	OR application rejected		<input type="checkbox"/>

12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:
(i) City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)
(iv) Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010	Year: 2011	Year: 2012
(i) London Councils	922,881*	922,881*	885,381*
(ii) LB Ealing (Consultancy)		15,000	
(iii) Greater London Authority			36,000
(iv) LB Lewisham (Consultancy)			13,432
(v) Big Lottery BAS/2/010265715		8,514	
(vi) Big Lottery		399,555	

13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011	Year: 2012
Money Advice Trust	75,176	74,205
Baring Foundation	102,062	56,999
City Parochial Foundation	35,000	24,750
Anglican Water Trust Fund	54,756	-
Friends Provident Foundation	-	86,138
Trust for London	16,500	-

14. What steps is your organisation taking to reduce its carbon footprint?

AdviceUK was awarded the 'Green Mark' Level 1 at its previous premises. Our current premises are short term so a new audit has not been requested.

Global Action Plan conducted an Environmental Audit in July 2009 and noted the following:

- A maximum 19 degrees is set on the thermostat
- paper is reused (ie both sides), print both sides and booklet style where possible,
- electronic communication is used where possible rather than hard copy, emails are not printed out
- AdviceUK recycles paper, card, plastic, glass, cans,
- computers and screens are switched off overnight
- T12 flourescent tubes replaced with T8 or T5 tubes
- Drinking water is via a mains-fed water cooler rather than by bottles
- Staff travel to work is by public transport (some staff use a bicycle),
- business travel across the UK is by train - air travel only when unavoidable

15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

In order to provide the right information, please refer to guidance note 15 before completing this section.

Since 2007, AdviceUK has pioneered the use of systems thinking methodology in the advice sector. Up to 40% of the demands placed on advice services are both predictable and preventable, resulting from the failure of public services to do the right thing, first time for their customers. Much of this 'failure demand' is due to the Department of Work and Pensions, but is also generated by local authorities and others. AdviceUK has highlighted ways in which advice services themselves also might contribute to systemic failure such as by a piecemeal approach to problem solving and poor referral systems. We have started to develop a whole person approach to the provision of advice services, which looks beyond the presenting issues and their triggers, and seeks to address underlying causes by working collaboratively, across and beyond the advice sector. This approach will support Londoners to become more independent and resilient, rather than just dealing with the symptoms.

Supported by AdviceUK, the BAMER Advice Network (BAN) has worked collaboratively as an integrated network of quality assured advice agencies (since 2006). Community led services are delivered by and for people from London's migrant refugee communities, and there is a strong track record of success in delivering a co-ordinated range of services pan-London. The need for this is particularly great now as the BAMER communities are disproportionately affected by poverty and the welfare changes. Especially, the demand for money advice including fuel poverty and housing debt is a massive issue and the response to this will be more robust at a delivery level if there is a more cohesive collaboration. At a policy and influencing level, this work is timed perfectly to provide voice and demonstrate the impact of the welfare changes, persistent high levels of unemployment and squeezed living standards in BAMER communities.

AdviceUK is seeking funding to support BAN develop a more strategic outlook based on whole person principles so that BAN is an effective voice advocating the needs of migrants and refugees across London, through active engagement with service providers to address system failings.

The project will be delivered by an AdviceUK Development Consultant (0.6 fte) who will co-ordinate the delivery of the project activities, which fall under 4 broad objectives:

- To establish and support BAN as a legal entity
- To set up and deliver a peer support training programme
- To set up and facilitate the development of a BAN referrals protocol
- To develop and implement a system for collecting social policy data

The Development Consultant will work closely with the current BAN steering group, the BAN Board Members, and the individual member agencies to ensure the activities that make up the project workplan are successfully delivered

This project will aim to strengthen and sustain the BAMER advice sector in London. It will enable BAN to become an independent, self-determining body; promote and develop closer working relationships within the BAMER advice sector; and increase BAN's capacity to provide a voice for the BAMER advice sector. In delivering this project AdviceUK will be adopting and developing the whole person approach to enable the Network to develop its strategic role, become stronger and work with others to better support people to live independently; AdviceUK has learning and skills capacity and resources and knowledge of and networking into funding sources which will be utilised to provide support the capacity building of the Network members to make them stronger. The feedback we get from BAN members will contribute to the ongoing development of the whole person philosophy.

The project meets the Trust's theme of Strengthen the Voluntary Sector as it falls within the City Bridge Trust outcome: minority ethnic and/or refugee community organisations become more sustainable and work more collaboratively. By delivering the work under this project we will increase BAN's capacity to develop a stronger voice advocating for the needs and aspirations of the BAMER advice sector and we will establish stronger, more robust and sustainable advice services which will deliver better services to improve the lives of refugees and migrants across London. These stronger more robust organisations will in a far better position to attract funding at the same time.

16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.

We will be tracking the progress our work by developing and implementing a monitoring and evaluation framework. In the early stages of the project we will be carrying out a development support needs analysis with BAN member agencies which will provide a baseline to track and assess progress.

The framework will have measurable outcomes and related indicators, milestones, targets and means of verification. Both quantitative and qualitative data will be collected for each outcome. Information will be gathered through various methods including training evaluation forms, ongoing consultation to BAN members, number of appropriate referrals between members, case studies etc.

Data will be analysed by comparing anticipated and actual outputs and outcomes. Results will be included in progress and annual progress reports. We will identify project learning and its impact on service delivery. Performance against budget will be monitored monthly by London's senior development consultant and the Head of Development.

Please see attached BAN Project Planning Triangle

17. Beneficiaries

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

How many people will benefit from the grant per year? **40 groups**

What age group will benefit? **all**

In which local authority is your organisation based?
Tower Hamlets

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
PAN London

At what address will the activity be located? **BAN operates from a range of locations across London**

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

	%		%
White - British	0.3	Black - Caribbean	0.5
White - Irish	0.1	Black - African	14
White - Other (please describe) European	14	Black - Other (please describe) other	1.1
Asian - Indian	3.5	Black - British	0.4
Asian - Pakistani	9.6	Chinese	0.1
Asian - Bangladeshi	1.2		
Asian - Other (please describe) Asian British & Tamil	21	Other (please describe) Middle East & Latin Amer	29
Open to everyone			

What proportion of the beneficiaries will be disabled people?
27% (above figures based on BAN monitoring returns for Oct 12 - March 13)

18. Funding required for the project

What is the total cost of the proposed activity/project?
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
For detailed budget see Appendix 1				
Staff related costs	32,985	16,493		49,478
Overheads	14,208	7,156		21,364
Project specific costs	2,800	1,400		4,200
TOTAL	49,993	25,049		75,042

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
TOTAL				

What other funders are currently considering the proposal?

Funders	£
N/A	
TOTAL	N/A

19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff related costs	32,985	16,493		49,478
Overheads	14,208	7,156		21,364
Project specific costs	2,800	1,400		4,200
Please see detailed budget (Appendix 1)				
TOTAL	49,993	25,049		75,042

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20. Funding requested from the Trust (continued)

When will the funding be required? October 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? By the end of the funding period BAN expects to have raised funds in its own name to continue its work
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? N/A

21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

Referee	
Name:	Matthew Smerdon Deputy Director
Organisation:	The Baring Foundation
Address:	60 London Wall London EC2M 5TQ
Tel:	020 7767 1348
E-mail:	Matthew.Smerdon@UK.ING.COM

Declaration on behalf of applicant organisation

I, **Wesley Harcourt** (your name)

am an authorised representative of

ADVICEUK (your organisation)

within which I am **Senior Development Consultant** (your position)

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

Signature



Date **31 May 2013**

How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

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MEETING: 09/01/2014

Ref: 12014

ASSESSMENT CATEGORY - Making London More Inclusive

Action for Kids

Adv: Ciaran Rafferty

Base: Haringey

**Benefit: Several North
London boroughs**

Amount requested: £82,500

{Revised request: £107,700}

Amount recommended: £107,700

Purpose of grant request: To provide Job Coaching to support young people with learning disabilities into paid employment.

Background

Action for Kids (AfK) is a charity that helps young people with physical and/or learning disabilities find greater levels of independence and opportunity, through the provision of mobility aids, employability training, and family support. It was established in 1991 and has grown since then to an organisation with a turnover of over £2m, working across the UK.

Funding History

AfK has received two previous grants from the Trust – the first, for £30,000, in February 2002 for a work experience project; and the second, in May 2009, for £75,000 for a core development post. Both grants were satisfactorily monitored.

Current Application

This application is to expand and develop a current - but limited - Job Coaching Service for disabled young people aged 19-25. The need for the project has come directly from young people themselves when the desire to work and/or to earn money ranked highest in a survey of what they would like to do or achieve. The charity has an extensive network of contact with young disabled people through its other services (including an active work-experience programme) and can state the need for a job-support programme with some confidence.

The application principally comprises funding for a full-time Job Coach who would devise a bespoke plan-of-action for each young person before allocating them to a fully-trained volunteer mentor. A key function for the Job Coach will be to liaise with potential employers to ensure that both they and the young person are clear in their respective responsibilities and to allay any fears or concerns on either side. When ready, the match will be made and the personal support for the employee will continue and will include building their general skills and confidence. The aim, of course, is for the young people to achieve and sustain employment but even if this doesn't occur the process of intensive and tailored support will undoubtedly help them develop skills which will aid their independence in

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the long term. For the employers, the current scheme has shown that they will get used to having someone with disabilities in the workplace and will be more likely to offer real work opportunities in the future.

Financial Observations

Audited accounts for the year ended 31st March 2013 show a deficit of £169,234 (7.8% of turnover), comprising £109,515 on unrestricted funds and £59,719 on restricted activity.

The reserves policy states that the organisation aims to hold free unrestricted reserves equivalent to 6 months' worth of expenditure which equates to £1,223,985 based on 2013/14 budgeted expenditure. At 31st March 2013 free unrestricted reserves stood at £101,101, equating to 2.1 weeks' worth of expenditure.

The organisation advised that it has found it challenging at times to increase its level of free reserves whilst maintaining its services in the face of a drop in income. However, the budget for the current year 2013/14 shows a surplus of £28,265 (1% of turnover), most of which is on unrestricted funds. The charity advises that this improvement from the prior year's deficit position has been achieved through an overall increase in income, including lottery funding and more corporate support, coupled with a review of expenditure which resulted in a reduction in the number of staff and tighter budget management. Total income is expected to be £2,476,234, an increase of £284,499 (13%) over the prior year, of which £1,594,105 (64.4%) has been confirmed as at 31st October 2013.

Officer's Appraisal

This proposal for targeted and bespoke job coaching for young disabled people is based on clearly demonstrated need. The charity's excellent track record in providing for this client group underpins their understanding of what is needed and how it should be delivered. In this respect one can be confident that valuable outcomes will be achieved by this project.

The organisation initially requested £82,500 of the full cost of £109,790, on the basis that it would look to raise the balance from elsewhere. Although some additional funds have been earmarked from another small charity there is no reason why your Committee could not consider supporting the full remaining costs as, to do so, would reduce the likelihood of the organisation having to dip into its already slim reserves. A revised request to this effect has been received and is reflected in your officer's recommendation.

Recommendation

£107,700 over three years (£36,500; £35,600; £35,600) for the salary of a f/t Job Coach and related project costs to help young disabled Londoners into employment.

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Action for Kids	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Haringey	
Contact person: Mr. Andrew Goddard	Position: Trust&Statutory Manager
Website: http://www.actionforkids.org	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number:
When was your organisation established? 01/05/1991	
<p>Aims of your organisation:</p> <p>To transform the understanding of disability, and make sure young people living with a disability get the right support, at the right time for as a long as needed.</p> <p>To achieve this we :</p> <ul style="list-style-type: none"> • involve, inform and empower young people living with a disability; • provide the best possible tools, education and support; • champion the rights and interests of people living with a disability; • share our learning and experience; • have a skilled and committed workforce. 	
<p>Main activities of your organisation:</p> <p>We focus mainly on people with learning disabilities and help people up to the age of 26.</p> <p>Activities include:</p> <ol style="list-style-type: none"> 1) A Job Coaching service designed to support young people with moderate to severe learning disabilities into employment. 2) A varied programme of accredited learning in areas such as life skills and office skills. 3) The opportunity to do work experience in our busy Head Offices - including a key project, which is a fundraising raffle, specifically designed to provide experience of working in an office. 4) Support to young disabled people in schools to help them plan the transition to post-school life. 5) A programme of fun, social activities during the school holidays that gives people the chance to receive sports coaching, take part in art and music etc. 6) Mobility equipment that is generally unavailable on the NHS for the benefit of young disabled people whose families cannot afford to buy things privately. 	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
35	27	4	10

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?
Owned	

Environmental Impact

City Bridge Trust wants to help voluntary sector organisations to have a positive environmental impact. Please tell us how much your organisation is already doing to have a positive environmental impact using the definitions below to help you decide.
Getting started: We try not to be wasteful and have introduced some simple 'green actions'.

Grant Request

Details of grant request

Under which of City Bridge Trust's programmes are you applying? Making London More Inclusive
Which of the programme outcome(s) does your application aim to achieve? Work supporting young disabled people (aged 16-25) in the transition to adulthood and/or independent living
Please describe the purpose of your funding request in one sentence. To provide Job Coaching to support young people with learning disabilities into paid employment.
When will the funding be required? 20/03/2014
How much funding are you requesting? Year 1: £27,500 Year 2: £27,500 Year 3: £27,500 Total: £82,500
Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to fund it? We would run the activity as a 3-year project with a full evaluation at the end of the project. If we achieve the success that we expect to, then we would look to continue the activity and would fundraise to do so.
If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached? Not applicable.

Summary of grant request

HOW PROJECT MEETS TRUST OUTCOME AND WHAT PROJECT WILL AIM TO ACHIEVE

For non-disabled people, obvious journey in the "transition to adulthood", is from education to work. The end-point is paid work. We'll offer Job Coaching to young people aged 19-25 that have moderate to severe learning disabilities. End goal: to help people into supported (paid) employment. The intermediate steps involved in the Job Coaching project will help facilitate the transition from education into employment. Gains resulting from employment will include people earning their own money, gaining more control over their lives and increased self-esteem.

The project meets the outcome of "work to support disabled adults and young disabled people in transition to adulthood and/or independent living."

NEED FOR PROJECT, HOW THE WORK WILL BE DELIVERED AND WHY WE ARE THE RIGHT PEOPLE TO DELIVER IT.

We know the project is needed from feedback gained from our students. Young disabled people have told us that their number one life goal is to obtain paid work. For example, we held a Participation Day with young people with learning disabilities and their parents; students were invited to spend a hypothetical 'budget,' to show what Action For Kids should be spending its money on. And all of the young people indicated that our priority should be helping them into work. We've also conducted a series of electronic interviews with young disabled people. Of 43 people, 38 mentioned a desire to work or earn money and more than 20 mentioned specific types of work that they might like to do. Statistics from MENCAP show the challenges faced by young people with learning disabilities in getting into paid work - Less than 20% of people with learning disabilities are in paid work, although at least 65% of them want to work.

Job Coaching involves assessing the skills base, capabilities and interests of each young person, brokering suitable work experience opportunities & placements and/or training courses to develop their skills and then, finally, brokering suitable Supported Employment opportunities. We believe we are the right organisation to carry out this work because we have already enjoyed some success getting external work experience placements as well as a couple of people into supported employment with a Job Coach that we currently have working with some of our students (mainly those 25+). We believe that a new full time Job Coach will be able to emulate & build on this to help those aged 19-25 to develop vital work skills and enter supported employment.

PRINCIPLES OF GOOD PRACTICE:

Views and desires of young people with learning disabilities are central to what we do at AFK. We spend loads of time canvassing views and getting feedback. Job Coaching will involve bespoke, intensive one-on-one support. It can't be planned or managed on a "one size fits all", basis. But each young person will be the key driver that decides what support they are offered on the project - when, how often etc. They'll also be involved in a full evaluation of the service.

We're based in North London and most 19-25 year olds first come to us with their schools when 14-18. School intakes reflect the ethnic make-up of North London and so, in turn, does our intake. We celebrate diversity with trips out to local places of interest, such as Hindu Temples, or a Synagogue etc and by encouraging students to bring in (and share) different cuisines. In terms of volunteers, we have a dedicated Volunteer Co-Ordinator and provide a dedicated training programme for all volunteers. We participate in a range of local re-cycling schemes.

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.

Job Coaching which will involve the following steps: 1) assess the work-related skills, interests and ambitions of each young person. 150 assessments will take place over 3 years.

2) Devise specific, individualized support programmes to help them realise their ambitions. 150 people will be given individualized support programmes over 3 years.

3) Broker suitable work experience/training/ internal/external work experience placements to develop skills. 150 people over 3 years will undertake internal work experience/training and 50 will take up external work experience placements.

4) Broker actual paid employment (supported employment). We'll broker 20 paid supported employment jobs over three years.

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.

20 young people with learning disabilities will gain paid employment (mainly Supported Employment). As a result they will gain self-esteem, their own money and (as a consequence of getting their own money) more control over their own lives.

50 young people with learning disabilities will take up external work experience placements which will make people more prepared for paid work by giving them specific experience of carrying out actual jobs and developing work-related skills specific to those jobs.

Individualised work skills training for 150 young people with learning disabilities will build key work related skills, such as team-working skills, interpersonal skills, presentational skills & punctuality and help people to understand the importance of these skills in gaining/holding a job.

Who will benefit?

About your beneficiaries

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

50

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

Haringey (40%)

Barnet (20%)

Islington (20%)

Waltham Forest (20%)

What age group(s) will benefit?

16-24

What gender will beneficiaries be?

All

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

Mixed/ Multiple ethnic groups (including White and Black Caribbean; White and Black African; White and Asian; Any other Mixed/ Multiple ethnic background)

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

91-100%

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 & on-costs of Job Coach.	33,100	33,100	33,100	99,300
Recruitment costs for post	2,900	0	0	4,000
Travel budget	2,500	2,500	2,500	7,500
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	38,500	35,600	35,600	109,790

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
n/a	0	0	0	0
	0	0	0	0
	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
We have only just decided to seek a second job coach so this is our first application	0	0	0	0
	0	0	0	0
	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
Salary & on-costs of postholder	27,500	27,500	27,500	82,500
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	27,500	27,500	27,500	82,500

Finance details

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

Financial year ended:	Month: March	Year: 2013
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Income received from:	£
Voluntary income	1,641,165
Activities for generating funds	0
Investment income	242
Income from charitable activities	550,328
Other sources	0
Total Income:	2,191,735

Expenditure:	£
Charitable activities	1,919,722
Governance costs	72,181
Cost of generating funds	369,066
Other	0
Total Expenditure:	2,360,969
Net (deficit)/surplus:	-169,234
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	-169,234

Asset position at year end	£
Fixed assets	981,467
Investments	3
Net current assets	156,366
Long-term liabilities	70,456
*Total Assets (A):	1,067,380

Reserves at year end	£
Endowment funds	0
Restricted funds	627,400
Unrestricted funds	439,980
*Total Reserves (B):	1,067,380

* 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?
1-10%

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.

	2010 £	2011 £	2012 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	113,285	66,169	104,558
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	2010 £	2011 £	2012 £
Ellerdale Trust	30,000	30,000	30,000
May & Stanley Smith CT	37,353	38,023	28,134
EBM Charitable Trust	20,000	20,000	25,000
ACT Foundation	0	25,000	25,000
Henry Smith Charity	28,600	29,200	29,800

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: **Andrew Goddard**

Role within **Trust Manager**
Organisation:

Committee:	Date:	Ref No.
The City Bridge Trust	9 th January 2014	
Subject: Partnership with Prisoners Abroad		Public
Report of: Chief Grants Officer		For Decision
<u>Summary</u>		
<p>Following your Quinquennial Review 2012/13, this paper sets out proposals to develop a hardship fund, in partnership with Prisoners Abroad, for British citizens returning to London after imprisonment overseas whose sentences are spent and who are at high risk of street homelessness as a result of destitution.</p> <p>Recommendation</p> <p>That Prisoners Abroad is awarded a grant of £330,000 from your grants budget for 2013/14 in order to establish and administer a hardship fund for destitute British citizens returning to London after imprisonment overseas.</p>		

Main Report

1.0 Background

- 1.1 At your June 2013 meeting, you received a paper outlining the proposed programmes for the Trust for the next five years, following your latest Quinquennial Review. These were approved by the Court of Common Council in July 2013.
- 1.2 As well as your open programmes, *Investing in Londoners*, which were 'soft-launched' at the end of September 2013, you approved a number of partnership programmes to be developed over the coming months, including the establishment of two hardships funds to support individuals in need. One of these was a partnership with the Buttle UK to establish a hardship fund for survivors of domestic violence in London and you approved proposals for this at your last meeting. The other was to establish a hardship fund in partnership with Prisoners Abroad (PA) in order to help British citizens returning to London after imprisonment overseas. This paper sets out proposals for the development and resourcing of this partnership.

2.0 About Prisoners Abroad

- 2.1 PA is the only UK charity caring for the welfare of British prisoners held in foreign prisons, often in conditions that seriously threaten their physical and mental health. During 2012/13, it provided assistance to 1,745 Britons detained overseas in a total of 95 countries.
- 2.2 It has three main areas of activity:
- **Working with clients during prison sentences.** PA provides a vital link between prisoners detained overseas and various agencies both in the UK and in the country in which they are held. PA provides specialist advice to prisoners and their families, including information on foreign criminal justice systems, prisoners' rights, prison conditions, parole, remission and transfer to the UK. It also provides grants to assist those in financial hardship. Last year, this amounted to £250,000 of which £114,000 provided 446 prisoners with survival grants to provide additional food where the quantity and quality of food is inadequate. Last Year, PA provided assistance to 1,745 Britons detained overseas in a total of 95 countries.
 - **Working with families and friends of those detained.** Last year, over 2,000 families were registered to receive PA's services, an increase of just under 600 from the previous year. PA provides advice, support and information to friends and family about foreign prison conditions and criminal justice systems. It aims to aid communication between families and the imprisoned family member and to prevent family relationships from breaking down, for example, by developing an interactive scrapbook to enable families, especially those with children, to stay in touch with their relative in prison. It also helps families to book and arrange visits, and last year helped 29 families with grants of £9,400 to visit their relative overseas.
 - **Resettlement work following release from prison:** PA's resettlement service provides a range of services designed to prevent homelessness and destitution for Britons returning to the UK. Last year, 156 returning ex-prisoners used the resettlement service and PA provided £82,400 in emergency grants for accommodation, food, travel, clothes, toiletries and other survival items.
- 2.3 It provides free and confidential services on the basis of need. It does not campaign to get prisoners released and it cannot give legal advice, pay fines or visit prisoners overseas.

3.0 About Prisoners Abroad Resettlement Service

- 3.1 Many of the people helped by its resettlement service have lived abroad for many years and don't have family or friends in the UK to help them. They are not entitled to statutory support because they have not come through the UK prison system and they are therefore vulnerable to becoming homeless and/or reverting to criminal activity in order to support themselves. PA plays a pivotal role in preventing such a decline through its partnership with the Foreign and Commonwealth Office

whose consular staff take PA's registration forms into prison which means it has some information about an individual's needs prior to their release. It also works in partnership with the Travel-Care charities based at airports which will issue returning prisoners with a ticket they can use to travel to the offices of PA. Here they can access crisis support such as a shower, toiletries, clothes and emergency housing, followed by 2-4 months of support from a resettlement officer. Once the client's most urgent needs have been met, that is, they have temporary accommodation, they are claiming benefits and they have received any urgent medical attention they may need, then PA will refer them on to other relevant agencies that can provide further specialist support.

4.0 Why the need?

- 4.1 Many of the ex-prisoners supported by PA either left the UK as children, or have lived a long time overseas. It means that when they return, sometimes as a result of a deportation order, they have nowhere to live and no family to turn to. Some may be traumatised after surviving a harsh prison regime and some may have lost contact with family during a long period of incarceration.
- 4.2 PA's clients often arrive back to the UK with complex emotional and psychological problems which prevent them from getting their lives back on track. The needs of its clients can be varied and complex, ranging from separation from family and friends as a result of deportation; trauma following harsh prison conditions; addictions or mental health problems that may have led to their incarceration in the first place; loss of contact with family and friends.
- 4.3 PA's clients typically arrive back in the UK with no money and nowhere to stay and have no NI or NHS number that would enable them to open a bank account, claim benefits, access health services, and find employment. As well as the psychological problems described earlier, they may also have little knowledge of systems and culture in the UK, such as the benefits or employment system.
- 4.4 Since April 2013, PA's clients have not been able to access the previously centralised Social Fund, since its devolution to local authorities. In order to access a Crisis Loan, to cover the cost of a rent deposit, for example, applicants have to prove a local connection, including a minimum residency of 6 months, or proof that they have been homeless in the borough. As a consequence, PA is increasingly helping its clients with these costs.
- 4.5 Historically, it has funded its resettlement services (and the other areas in which it supports individuals) through a mix of grants, individual and major-donor giving programmes and trusts and foundations. Core support from trusts and foundations play a crucial part in providing stability and the capacity for forward-planning. PA is now moving into a

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more challenging period as its clients need more support and for a longer period as a result of changes to the benefits system. The partnership with the Trust will enable it to maintain the quality of its resettlement service and provide a solid foundation for the development of future services.

5.0 How the Trust's funding would be used

5.1 The resettlement officer's initial interview with a client is key to assessing their need for funds. The majority of PA's clients are men and they may well have arrived in shoes and clothes in appropriate for the climate, in need of a shave and/or a wash. The resettlement officer will build a picture of the client and what is needed to see them through the challenging first few days and weeks following their return to the UK.

5.2 PA's clients use its re-settlement service as a last resort because there is no alternative help available. The hardship fund would be used for the following, depending on the most pressing needs of the client:

- **Emergency Accommodation:** PA will book its clients into hostels or Bed and Breakfast to ensure they have a roof over their heads during the first few days and weeks of their return and will meet the cost (between £100 and £150 per week) until their benefits come through or they have secured employment, whichever is sooner.
- **Subsistence:** Clients with no money may be provided with up to £5 per day for food until benefit claims (or employment) come through.
- **Travel:** Travel grants (usually Oyster cards) give clients the necessary mobility to sort out vital administrative matters in the crucial days and weeks after their return. It enables them to register at their local Job Centre, attend medical appointments or get to a hostel for an overnight stay, for example.
- **Basic necessities:** Some clients arrive only with the clothes they stand up in. PA is able to assist with clothes, toiletries, a map of London and other items critical to day to day survival.
- **Passports:** Many clients arrive back in the UK with only an Emergency Travel Document, not a passport. A passport, especially for those who have lived overseas for a long time, is key to proving their identity and therefore complete registrations and access services. Some of PA's grants therefore help clients to obtain a passport.
- **Pre-paid mobile phones:** A mobile phone can help clients to complete vital administrative tasks where they do not have access to a landline as well as to make contact with family and friends.
- **Agency fees, rents in advance, deposits:** Whilst its clients are in temporary accommodation, PA helps its clients to find more permanent accommodation. Clients need an address in order to claim benefits, look for work, and to be able to complete many registrations – from applying for a library card, to opening a bank account, to obtaining a NHS number. With soaring rents in London, and a lack of available social housing, it is very difficult for PA's clients to access reasonable, affordable housing. To help its London clients, PA has developed

relationships with private lettings agencies and social enterprises that specialise in housing ex-offenders. These organisations typically charge an agency fee, a month's rent in advance and, on occasion, a deposit. PA awards grant to meet these costs.

- **Starter packs:** Once its clients are ready to move into longer-term accommodation, PA assists with basic starter packs that include items such as a kettle, cutlery, crockery, basic kitchen equipment and bedding.

5.3 The vast majority of grants awarded are paid directly to the supplier, giving reassurance that funds are used for their intended purpose.

6.0 Monitoring & Evaluation

6.1 Last year, PA introduced a new evaluation framework to help it evaluate its success. As well as quantifiable information, such as the number and type of grants awarded, PA will measure the extent to which grants have helped clients re-settle, gain independence and improve their emotional well-being. PA uses a comprehensive exit questionnaire for clients who have received its services which covers a range of questions about which of PA's services they have used and how helpful they have found them, together with a number of questions about their health and well-being.

6.2 It also holds an annual focus group. Last year, this involved 30 clients, whose feedback included:

- 83% had benefitted from its emergency accommodation grants
- 97% had received assistance in applying for state benefits
- 47% said that PA had referred to employment advice services
- 20% said that PA had referred them to education and training services
- 95% said that the travel grants had made it is easier for them to attend appointments

7.0 Cost

7.1 PA has submitted an indicative annual budget which includes a 15% contribution to its overheads as well as a contribution towards evaluation. This is set out in the Table 1 below which shows the number, type and value of grants that are proposed. This will enable a minimum of 150 people to be supported. Some clients will need more than one category of grant, depending on their circumstances

7.2 As this is a new way of working for the Trust, it is recommended that you take the same approach with this grant as you did with Buttle UK by committing funds for 18 months initially. This would give time for the partnership to run for a year and to then be evaluated. A re-assessment of the likely funding requirement going forward would then be presented to your Committee during 2014/15.

Table 1

Costs	Year 1		Year 2		Total
	No	£	No	£	
Emergency Accommodation	100	52,000	50	26,000	78,000
Subsistence Grants	140	16,700	70	8,350	25,050
Travel Grants	150	20,000	75	10,000	30,000
Basic Necessity Grants	100	4,000	50	2,000	6,000
Passports @ £70	45	3,150	22	1,540	4,690
Mobile Phones @ £30	60	1,800	30	900	2,700
Agency fees, rents in advance & deposits	60	82,500	30	41,250	123,750
Starter Packs @ £100 average	60	6,000	30	3,000	9,000
Total Grants		186,150		93,040	279,190
Contribution to Monitoring & Evaluation		5,850		2,960	8,810
Contribution to overheads		28,000		14,000	42,000
Grand Total		220,000		110,000	330,000

8.0 Financial Observations

- 8.1 The proposed grant contribution from the City Bridge Trust is £330,000 over an initial 18 month period. It is anticipated that £42,000 of the grant will be used to meet the overhead costs of the Charity in administering this hardship fund, £8,810 will be used towards evaluations costs, with the remaining £279,190 directed towards "Crisis", "Move On" and "Bridging" support costs. It is proposed that the grant will be released on a phased basis as required by the charity. The intention is to maintain a level of at least £10,000 in the hardship fund. The initial tranche of hardship funding will be £50,000, in addition to the overhead costs which will be paid quarterly.
- 8.2 Accounts for the year ended 31 March 2013 indicate a surplus for the year of £10,086 (0.75% of turnover), comprising a deficit for the year of £53,414 Restricted Funds and a surplus of £63,500 on Unrestricted Funds. The net total funds as at 31 March 2013 were £498,558 (including £43,760 Fixed Assets) comprising £20,000 in Restricted Funds and £478,558 in Unrestricted Funds.
- 8.3 The reserves policy states that the organisation aims to hold a level of free reserves ranging from £386,000 to £567,000 for risk mitigation. Free reserves held at 31 March 2013 were £434,798 comprising total funds less restricted funds and net fixed assets. This is equivalent to 6.5 months' unrestricted expenditure.
- 8.4 The budget for 2013/14 shows a total projected actual income of £1.52 million and projected actual expenditure of some £1.55 million. Confirmed/received income totals £1.32 million and unconfirmed income

totals some £202,000. A deficit of some £26,000 is currently projected for the year.

9.0 Conclusion

- 9.1 The proposed partnership with PA is intended to complement two of your new Investing in Londoners programmes, 'Reducing Poverty' and 'Resettlement and Rehabilitation of Offenders'.
- 9.2 PA has the expertise and track record to support a highly vulnerable client group at a critical time during their return to London. Arriving in London without basics such as a travel card, and often no family or friends, is traumatic and it would be all too easy for these individuals to become suicidal, drift into substance abuse or re-offend and/or become street homeless. PA is able to provide the practical and emotional support to aid their successful resettlement.
- 7.3 As this is a pilot, it is recommended that you commit funds for 18 months initially, with a decision regarding the level of future funding based on an evaluation of the first 12-18 months.

8.0 Recommendation

- 8.1 That Prisoners Abroad is awarded a grant of £330,000 from your grants budget for 2013/14 in order to establish and administer a hardship fund for destitute British citizens returning to London after imprisonment overseas.

Jenny Field, Deputy Chief Grants Officer
020 7332 3715
jenny.field@cityoflondon.gov.uk
Report written: 18th December 2013

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Committee(s):	Date(s):	Item no.
The City Bridge Trust	9 th January 2014	
Subject: Applications recommended for rejection		Public
Report of: Chief Grants Officer		For Decision
<p><u>Summary</u></p> <p>This report and the accompanying schedule outlines a total of 6 grant applications that, for the reason(s) identified, are recommended for rejection.</p> <p><u>Recommendation</u></p> <p>That the grant applications detailed in the accompanying schedules be rejected.</p>		

Main Report

1. There are a total of 6 applications recommended for rejection at this meeting. They are listed within categories in the accompanying schedules. In each case the "purpose" that is used to describe the application is that provided by the applicant organisation. All the recommendations are based on criteria set out in your Policy Guidance.

2. Copies of these application forms are available to view in the Members' Reading Room. If any Committee Member wishes to query any of the recommendations, this can either be done at the meeting, in which case the decision may be deferred while full details are provided to the Member concerned, or by contacting the Trust office in advance of the meeting so that an explanation can be provided prior to or at the meeting.

Contact:
 Ciaran Rafferty, Principal Grants Officer
 020 7332 3712
 Report written: 19/12/13

CBT iIL Recommended for Rejection (inc reasons) Landscape

The City Bridge Trust Committee - 9 January 2014

Summary of Recommendations for Rejection - Investing in Londoners and Working with Londoners

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
12015 Helping Hand Global 24/7	To run ESOL (& ICT) classes to 25 refugees and asylum seekers from the eastern Congo Democratic in order to reduce their poverty in UK.	A major part of this proposal and the associated costs (some of which appear very high) do not meet your priorities for funding.	£9,980	CR Islington
<i>Total English for Speakers of Other Languages (1 item)</i>			£9,980	
<u>Improving Londoners' Mental Health</u>				
12024 Health Psychology Management Organisation Services	Research into violence and persecution faced by refugee women; how it has affected their mental health and wellbeing and to improve their quality of life	Incomplete application. A huge request for funds which would equate, on an annual basis, to the organisation's entire turnover.	£279,989	CR Barking & Dagenham
<i>Total Improving Londoners' Mental Health (1 item)</i>			£279,989	

Ref & Organisation <u>Older Londoners</u>	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
12021 Hampton & Hampton Hill Voluntary Care	To cover the salary cost of the Befriending project leader	The application is for a contribution towards an existing telephone and face-to-face befriending service although fails to show how this work would deliver satisfactory outcomes to meet your priorities. The organisation holds free reserves far in excess of its policy.	£30,000	CR Richmond
<i>Total Older Londoners (1 item)</i>			£30,000	
<u>Resettlement and Rehabilitation of Offenders</u>				
12025 Royal London Society	To help us help at least a further 500 Ex-offenders become Returning Citizens through employment in the next 24 months.	The proposal is for funds which would, for the most part, be redistributed to individuals in the form of grants or awards to ex-offenders, whilst no case is made as to the specific London benefit. As such it falls outside your criteria for funding.	£40,000	CR Outside London
<i>Total Resettlement and Rehabilitation of Offenders (1 item)</i>			£40,000	

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Ref & Organisation
Purpose
Reason for Recommendation for Rejection
Amount Requested
Grants Officer & Area

Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Grants Officer & Area
11984 Asian Health Agency	To build a BME Partnerships4Health Consortium & provide bespoke business advice and support to BME health & social care providers and increase partnerships.	The proposal is extremely ambitious in scope and unrealistically costed/staffed to achieve the outcomes in the short time outlined.	£70,607	KMG Hammersmith & Fulham
11966 Carramea	To formally develop and launch a capacity building programme targeted at small charities and voluntary groups towards sustainability of services.	The application did not set out sufficiently robust and focused outcomes to match your programme aims. Financial information was unsatisfactory.	£78,144	JXM Harrow

Total Strengthening the Third Sector (2 items)

£148,751

Grand Totals (6 items)

£508,720

Committee:	Date(s):	Item no.
The City Bridge Trust	9 th January 2014	
Subject: Withdrawn & Lapsed Applications (Working with Londoners programmes)		Public
Report of: Chief Grants Officer		For Information
<u>Summary</u>		
<p>This Report draws your attention to those applications to the Working with Londoners programme which have been subsequently withdrawn by the applicant or lapsed due to additional information not forthcoming.</p>		
Recommendation		
That you receive this report and note its contents		

Withdrawn Applications:

Organisation

Purpose of Request

Mencap Hillingdon North and South Swimming and Therapy Pool Fund

"To partly fund a new pool enclosure."

Revised application to be submitted as a capital bid under Investing in Londoners, 'Making London More Exclusive'.

Age Exchange

"To create two new innovative projects as additional services within our Inspired Caring programme supporting older people in the community and to improve their well-being."

Organisation has withdrawn the application as it was unable to provide the necessary financial information within a reasonable time frame to enable a full assessment.

City Centre for Charity Effectiveness Trust Ltd

"To develop a channel to those non-profit organisations most in need through the use of a pro bono mentoring and consultancy scheme."

As a result of reduced capacity, Centre for Charity Effectiveness has withdrawn its application and is likely to seek your support in the new year.

Lapsed Applications:

Organisation

Purpose of Request

Kollun (A Women's Charity Organisation)

"Kollun's Healthy Living Project for Senior Bangladeshi Women of Tower Hamlets."

Despite repeated requests for financial information the organisation has failed to supply this within a reasonable time frame.

Trail-blazers Mentoring Ltd

"To support 40 young people annually serving custodial sentences in HMPYOI Isis (Plumstead) who are being released back to London to resettle successfully."

Despite several requests the financial information needed to progress this application has not materialised within a reasonable time frame.

Total Withdrawn Applications: 3

Total Lapsed Applications: 2

Recommendation

That you receive this report and note its contents.

Contact:

Ciaran Rafferty, Principal Grants Officer

Tel: 020 7332 3186

Date report written: 18/12/13

Committee(s):	Date(s):	Item no.
The City Bridge Trust	9 th January 2014	
Subject: Reports on Monitoring Visits	Public	
Report of: Chief Grants Officer	For Information	
<p><u>Summary</u></p> <p>You receive two sample monitoring visit reports at each of your meetings. These are in addition to the two substantial monitoring reports you receive annually. One of these, a report reflecting on issues arising from the monitoring and evaluation of grants was presented to your February 2013 meeting whilst a statistical monitoring report looking at trends in your grant-making was presented to your November 2013 meeting.</p> <p>Reports to this Committee are from visits MyBnk and the Garden Museum. Both organisations receive funding under your Working with Londoners' programmes. MyBnk, which you support through Positive Transitions to Independent Living, delivers financial literacy training for young care leavers. Garden Museum, funded under your programme for London's Environment, delivers outreach work in local schools. Mrs Littlechild and Mr Seaton took part in the visit to MyBnk.</p> <p style="text-align: center;"><u>Recommendation</u></p> <p>That Members receive this report and note its contents.</p>		

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City Bridge Trust – Monitoring Visit Report

Organisation: MyBnk	Grant ref: 11129	Programme area: Positive Transitions to Independent Living\e) Young care leavers
Amount, date and purpose of grant: 28/06/2012: £102,000 over two years (£50,000; £52,000) towards a financial literacy programme for young care leavers.		
Visiting Grants Officer: Karisia Gichuke accompanied by Vivienne Littlechild and Ian Seaton	Date of meeting: 10 December 2013	
Met with: Louise Wilson Development Director, Jessie Bradley Fundraising Officer		
1. Introduction to the organisation: MyBnk delivers financial and enterprise education programmes directly to 11-25 year olds. It helps young people learn how to manage their money and make enterprising decisions through interactive sessions, with the aim of breaking the cycle of poverty and dependence on welfare. It works with young people in schools and areas that conventional education struggles to reach, including those who are most disadvantaged and financially vulnerable.		
2. The project funded: The Money Works project empowers young care leavers moving into independent living to confront their money worries and gain control of their lives. Through a series of two hour workshops, the young people tackle banking, budgeting, borrowing, and university finance, with a view to identifying financial stress triggers, confronting doubts and bad habits around money in order to better enable independent living and support those trapped in debt or struggling with costs. MyBnk requested funding for two years, to deliver the Money Works programme to young care leavers in youth centres across London. The target was 47 programmes delivered in year one (94 over two years), with 16 of these to focus on a University Finance module for those thinking of higher education. Costs to be covered included staff time for the set up and delivery of the modules, travel for staff and young people to the sessions, and accreditation for the young people participating.		
3. Work delivered to date: At the end of the first year MyBnk has delivered the Money Works programme to 34 organisations across 20 London boroughs, preparing 262 young people for the financial challenges of independent living. However, there were 10 cases of organisations cancelling attendance. In addition, the University Finance module (8 sessions planned) has not been delivered at all. The organisation was aware that the need for the module would be lower as the percentage of young care leavers considering going to university is small in comparison to the total number leaving care, however, it was unexpected that no sessions at all would be delivered, and perhaps reflects that greater numbers of young people are choosing not to attend university. The organisation plans to use the resulting underspend from this delivery shortfall to extend the project over a longer period of time. It is also going to adapt the project, continuing to offer the university finance option, but as part of a suite		

that the young people can choose from, rather than as an individual module.

4. Difference made:

There are substantial stories of transformation following the workshops, such as one young woman who managed to decrease her £30,000 debt by 90%, however, staff report the most significant changes are in the attitudes of the young people towards the world and the confidence they gain to control their lives and their choices – the positive impact of financial literacy is felt far beyond the bank balance alone.

5. Grants Administration:

The organisation has kept in contact with the Trust throughout, providing an early update on the concerns around the delivery of the University module and implications for the remainder of the grant. The first annual report was received in good time and the quality of the report was very high. A variation to the grant has been agreed to use the underspend from year one to deliver the programme over a longer period of time.

6. Concluding comments:

It has been difficult for the project to plan the number of sessions to deliver with accuracy, as the numbers of care leavers can be hard to predict, and the organisation has had to be creative in sustaining interest between workshops being booked and being attended. The external context (university applicants dropping) has also had an impact. Understanding from funders is helpful to allow the organisation some flexibility. It is hoped that as the programme is delivered for a longer period of time more certainty will be achieved.

This notwithstanding, the grant to MyBnk is enabling significant numbers of young people leaving care in London to manage their money effectively, avoid unsustainable debt and improve their financial position and confidence. This is invaluable for these young people who are vulnerable in many ways, including financially, as they move into independent living at a young age. The visit to the organisation confirmed it to be vibrant and responsive to the young people it works with, and the quality of its training is evident in the huge number of partner organisations they work with. MyBnk is growing rapidly, as the situation for young people in London and across the UK means the financial skills the organisation teaches are more necessary than ever.

City Bridge Trust – Monitoring Visit Report

Organisation: Garden Museum	Grant ref: 10409 (CR)	Programme area: London's Environment\ a) Environmental Education
Amount, date and purpose of grant: 20/01/2011: £60,000 over three years (£19,700; £20,000; £20,300) for the salary of a p/t (3 days per week) Schools and Community Officer and associated running costs.		
Visiting Grants Officer: John Merivale	Date of meeting: 14 th March 2013	
Met with: Janine Nelson. Schools Liaison; Belinda Hirst, Fundraiser		
1. Introduction to the organisation: <p>The Garden Museum occupies the old church of St Mary-at-Lambeth, next to the entrance to Lambeth Palace. The rediscovery in the churchyard of the tomb of 17th century plant hunters, the Johns Tradescant (Elder and Younger), led John and Rosemary Nicholson to save the church from demolition and found the Museum of Garden History in 1977. The museum explores and celebrates British gardens and gardening through its collection, temporary exhibitions, events, symposia, education and outreach and its own garden. It was set up to tell the story of gardens in Britain and was the first collection of garden history in the world. It now has a collection of over 5,500 objects.</p> <p>The churchyard, although small, is the burial ground for several historical figures, some with a horticultural connection. Besides being the resting place of the Tradescants, it also houses the tomb of Captain William Bligh (of the HMS Bounty) who spent the last years of his life in Lambeth and who, when in charge of the Bounty, was on a mission to obtain breadfruit. Amongst the recorded burials are six Archbishops of Canterbury.</p>		
2. The project funded: <p>The project is an existing programme of outreach and environmental education, and funding covers the p/t post of Schools & Community Officer and some running costs. The post collaborates with local schools, to give children and teachers the resources and opportunities for hands-on education in horticulture. The project, however, also targets the general local population (through doctors' surgeries and other local groups) so that adults also benefit, not just from the environmental aspect but also through the opportunity to take part in healthy exercise which gardening can provide.</p>		
3. Work delivered to date: <ul style="list-style-type: none"> • A weekly after-school gardening club at Vauxhall primary School provides seasonal activities in the school's dining room – and in an outside garden newly made by the project. This has attracted regular pupils in manageable groups of up to eight at a time, plus parents and carers from five families. Activities include growing vegetables, harvesting and cooking, making scarecrows and bird feeders, and related art-works. • Six 2-hour length weekly education sessions at Ethelred Children's centre – involving children and adults in food and flower growing, and study of insect life cycles. • Work at a local Doctors' surgery – focussing on patients who are elderly and infirm, promoting exercise and mental wellbeing through gardening. Adult learner days have been held in partnership with South Bank University and Union Learn. 		

4. Difference made:

At Vauxhall primary, the expanded garden now includes a greenhouse made of recycled water bottles, new paths, and a compost area. The school has appointed a part-time teaching gardener, it has worked with the South Bank Centre on the rooftop garden above the Queen Elizabeth Hall, and the whole school has embraced gardening. There has been a marked rise in interest from teachers, who in turn report that children love it.

The Adult Learning Days at Lambeth Walk GP group Practice have given elderly patients the chance of meeting new people, meaningful engagement in physical activity, and improved wellbeing. This is proving replicable, and is providing a model for bids by other surgeries in Lambeth.

This project helps the museum to have a more substantial footprint in the local community and to engage with people of all ages in practical workshops and activities. While long-term benefits are always difficult to gauge with certainty, the indications from enthusiastic responses are clear enough. There can be no doubt that better environmental awareness is promoted among children and adults, along with the obvious physical enhancements to biodiversity. Whereas schools were always keen and used to send those pupils who benefited from free school meals – they are now sending pupils who come out of real interest, not because it is free.

The Garden Museum has been particularly imaginative in using its historical base and collections as a springboard for new work. A current exhibition about the sustainability problems of the cut flower trade has incorporated a remarkable installation sculpture of flowers suspended upside down from a ceiling grid.

5. Grants Administration:

The museum receives no funds from statutory sources and must instead rely on a combination of earned income (entrance charges, etc), donations and grants. In 2010, the recession caused the loss of a major, regular, donor to core costs - someone who previously could be relied upon to donate in the region of £200,000 pa. This has led trustees to re-think its funding strategy - this post was previously funded from the organisation's general income, but funds are now sought from other sources to ensure longer term viability and sustainability.

John Paul Getty Jr is funding some running costs for the next two years.

Furthermore, the museum plans a major new building – part café and part learning space – for which it has just achieved a Round 1 approval from HLF.

The organisation takes carbon emissions very seriously: a sustainability trainee has put in measures including a green wedding reception package – and the traineeship was short-listed for the Museum & Heritage Award in Sustainability.

The project is properly accounted for against the CBT grant – payroll records were seen and are satisfactory.

6. Concluding comments:

The project shows that history – while it is utterly essential as the context of our understanding – is not in itself sufficient subject matter to sustain a specialist museum of this kind. At the Garden Museum, history is also used to inspire and inform new work. The Museum also treats mainstream current environmental issues, and it is offering environmental education comparable to that of many other organisations – but it is all the better for that. While the majority of visitors come from all over London, the museum's particular heritage and building are a lucky privilege for the immediate area too.

Agenda Item 13

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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