



## The City Bridge Trust Committee

**Date:** THURSDAY, 27 JULY 2017  
**Time:** 1.45 pm  
**Venue:** COMMITTEE ROOMS, 2ND FLOOR, WEST WING, GUILDHALL

**Members:** Alderman Alison Gowman (Chairman)  
Dhruv Patel (Deputy Chairman)  
Karina Dostalova  
Simon Duckworth  
Marianne Fredericks  
Deputy the Revd Stephen Haines  
Alderman Alastair King  
Vivienne Littlechild  
Deputy Edward Lord  
Jeremy Mayhew  
Wendy Mead (Chief Commoner)  
Paul Martinelli  
Ian Seaton  
Deputy Dr Giles Shilson  
Alderman Andrew Parmley (Ex-Officio Member)

**Enquiries:** Amanda Thompson  
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**Lunch will be served in Guildhall Club at 1PM**  
**NB: Part of this meeting could be the subject of audio or video recording**

**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 15 June 2017.  

**For Decision**  
(Pages 1 - 8)
4. **OUTSTANDING ACTIONS**  
Report of the Town Clerk.  

**For Information**  
(Pages 9 - 10)
5. **PROGRESS REPORT**  
Report of the Chief Grants Officer.  

**For Information**  
(Pages 11 - 18)
6. **RISK REGISTER FOR BRIDGE HOUSE ESTATES (CHARITY NUMBER: 1035628)**  
Report of the Chamberlain and Chief Grants Officer.  

**For Decision**  
(Pages 19 - 26)
7. **GRANT APPLICATIONS STATISTICAL REPORT**  
To receive a report of the Chief Grants Officer.  

**For Information**  
(Pages 27 - 32)
8. **GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS**  
To consider the Chief Grants Officer's reports on grant recommendations as follows:-  

**For Decision**  
(Pages 33 - 34)

  - a) John Lyon's Charity (Pages 35 - 40)
  - b) Participatory City Foundation (Pages 41 - 50)
  - c) Rushey Green Timebank for Lewisham Local (Pages 51 - 58)

- d) All Hallows Bow (Pages 59 - 60)
- e) Islington Centre for Refugees and Migrants (Pages 61 - 62)
- f) Rushey Green Timebank (Pages 63 - 64)
- g) Disability Sports Coach (Pages 65 - 66)
- h) Park Theatre (Pages 67 - 68)
- i) Stay Safe East (Pages 69 - 70)
- j) Arts 4 Dementia (Pages 71 - 72)
- k) Ashford Place (Pages 73 - 74)
- l) Bexley Crossroads Care Limited (Pages 75 - 76)
- m) Eritrean Community in the UK (Pages 77 - 78)
- n) Queens Crescent Community Association (Pages 79 - 80)
- o) Plan Zheroes (Pages 81 - 82)
- p) Carney's Community (Pages 83 - 84)
- q) Synergy Theatre Project (Pages 85 - 88)
- r) Aston-Mansfield (Pages 89 - 92)
- s) Enfield Voluntary Action (Pages 93 - 94)
- t) Voluntary Action Islington Limited (Pages 95 - 96)

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

- a) Grants Recommended for Rejection (Pages 97 - 100)
- b) Grants Approved under Delegated Authority (Pages 101 - 102)
- c) Withdrawn and Lapsed Applications (Pages 103 - 106)
- d) Variations to Grants (Pages 107 - 108)
- e) Moving on Up Summary Findings (Pages 109 - 118)
- f) Communications & Events (Pages 119 - 134)

**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 15 June 2017.

**For Decision**  
(Pages 135 - 136)

14. **EVALUATION OF THE ANCHOR PROJECT**

Report of the Chief Grants Officer.

**For Information**  
(Pages 137 - 172)

15. **PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS**

Report of the Chief Grants Officer.

**For Information**  
(Pages 173 - 176)

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

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

## THE CITY BRIDGE TRUST COMMITTEE

Thursday, 15 June 2017

Minutes of the meeting of The City Bridge Trust Committee held at Guildhall, EC2 on Thursday, 15 June 2017 at 1.45 pm

### Present

#### Members:

Alderman Alison Gowman (Chairman)  
Dhruv Patel (Deputy Chairman)  
Karina Dostalova  
Marianne Fredericks  
Deputy the Revd Stephen Haines  
Alderman Alastair King  
Deputy Edward Lord  
Wendy Mead (Chief Commoner)  
Paul Martinelli

#### Officers:

Philippa Sewell	-	Town Clerk's Department
Amanda Thompson	-	Town Clerk's Department
David Farnsworth	-	Chief Grants Officer
Sufina Ahmad	-	The City Bridge Trust
Olivia Dix	-	The City Bridge Trust
Jenny Field	-	The City Bridge Trust
Becky Green	-	The City Bridge Trust
Martin Hall	-	The City Bridge Trust
Sandra Jones	-	The City Bridge Trust
Jack Joslin	-	The City Bridge Trust
Julia Mirkin	-	The City Bridge Trust
Kate Moralee	-	The City Bridge Trust
Geraldine Page	-	The City Bridge Trust
Ciaran Rafferty	-	The City Bridge Trust
Shegufta Rahman	-	The City Bridge Trust
Tim Wilson	-	The City Bridge Trust
Millie Allen	-	Communications Team
Kristina Drake	-	Communications Team

#### In Attendance:

- Jem Stein from The Bike Project
- Cath Cole from C Cubed Fundraising

#### 1. LONDON EMERGENCIES TRUST

The Chief Grants Officer informed the Committee of the work that the London Emergencies Trust had undertaken and the involvement of City Bridge Trust officer expertise in responding to terrorist attacks in the UK as well as the

recent fire at Grenfell Tower in the Royal Borough of Kensington and Chelsea. Members paid their respect to all those affected and to all the help that had been given so far.

2. **THE BIKE PROJECT**

The Committee welcomed Jem Stein from The Bike Project to the meeting.

Mr Stein advised that refugees going through the asylum process are only granted £36 a week in benefits to live on and are prevented from finding employment. Members noted that a bike can help them access the many resources that London has to offer without having to spend their limited financial allowance on other public transport options. Mr Stein advised that the Project took second-hand bikes, fixed them up, and donated them to refugees and asylum seekers. This had started on a small-scale but, since the refugee crisis, had escalated so much that an automated system had been put in place to manage and meet the demand. In order to secure long-term sustainability for the Project, some of the bikes that are received and donated go on to be sold through The Bike Shop. This had been the recipient of a Stepping Stones grant which allowed the shop to be scaled up and had resulted in subsequent social investment.

In response to Members' questions, Mr Stein confirmed that the Bike Project also undertook mobile bike repair, which provided an additional income stream as well as securing corporate partnerships. He advised that the Project did not ask for donations, focusing instead on sales, and were not looking to expand in terms of beneficiaries but were seeking to expand to other cities. He confirmed that bikes were collected from drop-off sites and those abandoned at racks (through liaison with building managers) and every bike was donated alongside the relevant safety equipment and cycling courses.

The Chairman thanked Jem Stein for his presentation.

3. **APOLOGIES**

Apologies were received from the Right Hon. the Lord Mayor, Simon Duckworth, Vivienne Littlechild, Jeremy Mayhew, Ian Seaton and Deputy Dr Giles Shilson.

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

There were no declarations.

5. **MINUTES**

**RESOLVED** – That the public minutes and non-public summary of the meeting held on 11 May 2017 be agreed as an accurate record.

6. **OUTSTANDING ACTIONS**

**RESOLVED** – That the Outstanding Actions update be noted.

7. **PROGRESS REPORT**

The Committee received the regular progress report of the Chief Grants Officer and discussed the updates provided.

**Strategic Review Update**

Members noted that the latest draft of the Strategy had been circulated and any further comments were welcome. The Chief Grants Officer advised that the implementation strategy would be developed in detail in the coming months. Part of this would be how to commit City Bridge Trust to extend its current activities to beyond that of simply grant-making (the total asset approach) and, therefore, the Committee's Terms of Reference would be reviewed.

**Lord Mayor's Show 2017**

Officers confirmed the arrangements for the Lord Mayor's Show CBT float, and it was noted that interest from any Members who wanted to be involved was welcomed.

**Human Resources Team Update**

- Head of Philanthropy Strategy – the Chief Grants Officer advised that interviews were underway and Members would likely be updated electronically before the next meeting.
- Grants Administrator - the Chief Grants Officer advised that Grants Administrator Becky Green would be going down to two days a week at the Trust from next week, and an offer had been made for a new member of staff on a 12 month fixed term.
- Social Investment Fund Associate - the Chief Grants Officer advised that the closing date for applications was 19th June.

**RESOLVED** – That the report be noted.

8. **GRANT APPLICATIONS - STATISTICAL SUMMARY**

The Committee received a summary of applications received and action taken under the grants programmes this financial year, including those recommended for decision to this meeting. Members noted that owing to the focus on strategic grants so far this year the balance was currently lopsided but would likely rebalance by the next meeting.

**RESOLVED** – That the report be noted.

9. **GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS**

9a **Age UK**

**APPROVED** - £337,000 over eighteen months to Age UK (Charity No. 1128267) to design and deliver an evaluated model for the prevention of fraud and support for older people in London affected by fraud.

**9b,c & d LGBT Sector Support - Positive East, LGBT Consortium, and Opening Doors London**

**APPROVED –**

- a) £281,000 over three years (£108,000; £88,000; £85,000) for the GMI Partnership to expand and diversify its work supporting the LGBT community in London. The grant is payable to Positive East.
- b) £217,000 over three years (£80,000; £69,000; £68,000) to the LGBT Consortium to create and manage an online directory/mapping tool of services in London and to provide capacity-building and general support to the LGBT third sector.
- c) £165,000 over three years (3 x £55,000) to Opening Doors London for a Training Coordinator (17.5hpw) and an Administrator (21hpw) plus other costs for a programme to develop the quality of services provided to older LGBT Londoners by voluntary and statutory agencies.

**9e Oasis Children's Venture**

**APPROVED** - £105,000 over 3 years (3x £35,000) towards a Green Prescription Programme for children and young people.

**9f Respond**

**APPROVED** - £95,000 over two further and final years (2 x £47,500) towards the p/t (0.5 FTE) Forensic Service Manager, clinical supervision and oncosts for the forensic service.

**9g Royal Court Theatre**

**APPROVED** - £73,700 to refurbish lifts; for additional assisted hearing equipment, improved signalling and signage; upgrades and supplements to emergency evacuation system. The grant is conditional on renewal of the lease with Cadogan Estates.

**9h Highgate Newtown Community Centre**

**APPROVED** - £68,400 over 3 years (£19,900, £24,020, £24,480) for 75+ Coordinator (30 hours per week), activity tutors and associated costs of the 75+ programme.

**9i Jacksons Lane**

**APPROVED** - £127,800 over 3 years (£43,100; £42,500; £42,200) for the Together project, including the salary of a freelance Project Coordinator (70 days p/a), 2 artists delivering Spare Tyre sessions (each working 36 days p/a), and associated project costs.

**9j Paintings in Hospitals**

**APPROVED** - £59,500 over 3 years (£19,750; £20,000; £19,750) to contribute to the salary costs of the p/t London Regional Co-ordinator (3 d/p/w), and associated running costs for the project.

**9k Toynbee Hall**

**APPROVED** - £98,600 over 2 years (£49,100; £49,500) to contribute to the salary costs of the P/T Wellbeing Centre and Volunteer Coordinator (3dpw) and associated running costs for the Centre for Wellbeing project.



9l **Centre 70**

**APPROVED** - £100,000 over 3 years (£33,340; £33,330; £33,330) towards the INSPIRE programme, including the salary of a part time (18hpw) Project Leader, contributions towards other staff involved in the delivery of the work, and associated project costs.

9m **The 999 Club and Lady Florence Trust**

**APPROVED** - £123,840 over 3 years (£40,465, £41,275, £42,100) for the salary of a f/t Senior Advice Worker (including on costs).

9n **Hackney Music Development Trust**

**APPROVED** - £90,000 over three years (3 x £30,000) towards the costs of a project manager for 2 days per month; the costs of the artist/mentors that work with the young people in custody and on release; and associated project costs.

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

10a **Grants Recommended for Rejection**

The Committee considered a report of the Chief Grants Officer, which recommended that ten grant applications be rejected for the reasons identified in the schedule attached to the report.

**RESOLVED** – That ten grant applications detailed in the schedule attached to the report be rejected.

10b **Grants/expenditure considered under Delegated Authority**

The Committee received a report of the Chief Grants Officer which advised Members of three expenditure items, totalling £19,010, which had been presented for approval under delegated authority to the Chief Grants Officer in consultation with the Chairman and Deputy Chairman.

**RESOLVED** – That the report be noted.

10c **Withdrawn and Lapsed Applications**

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

**RESOLVED** – That the report be noted.

10d **Variations to grants awarded**

The Committee received a report of the Chief Grants Officer which advised Members of a variation to one grant agreed by the Chief Grants Officer since the last meeting.

**RESOLVED** – That the report be noted.

10e **Unsuccessful Stepping Stones applications**

The Committee received a report of the Chief Grants Officer which advised Members of thirty one applications to the Stepping Stones fund that had been rejected for the reasons identified in the schedule attached to the report.

**RESOLVED** – That the report be noted.

10f **Progress report: Prince's Trust**

The Committee received a report of the Chief Grants Officer about the work of the Prince's Trust funded by the City Bridge Trust. Officers advised that the project had seen two full years of delivery and was approaching the three year review point. In response to a Member's question, officers advised that one of the objectives of the grant was to increase CBT's exposure to boroughs that had historically harder to reach and this was one of the areas that would be explored during the review.

**RESOLVED** – That the report be received.

10g **City Bridge Trust Communications**

The Committee received an update on the communications work of the City Bridge Trust.

**RESOLVED** – That the report be noted.

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

There were no questions.

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

The Committee put on record their thanks to Philippa Sewell, who had been the Town Clerk for the Committee for the past few years but was leaving the City Corporation.

13. **EXCLUSION OF THE PUBLIC**

**RESOLVED** – That under Section 100(A) 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 1 of Schedule 12A of the Local Government Act.

<b>Item No.</b>	<b>Exempt Paragraphs</b>
12 - 13	3
14 – 15	-

14. **NON-PUBLIC MINUTES**

**RESOLVED** – That the non-public minutes of the meeting held on 11 May 2017 be agreed as an accurate record.

15. **PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS**

The Committee received a report of the Chief Grants Officer outlining the pipeline for strategic grants.

**RESOLVED** – That the report be noted.

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

There were no questions.

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

There was one item of other business.

**The meeting ended at 2.37 pm**

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Chairman

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## The City Bridge Trust Committee – Outstanding Actions

Item	Date	Action	Officer responsible	To be completed/ progressed to next stage	Progress Update
1.	22 Sep 2016	<b>Website</b> Phase 2 (making the website more interactive) will be implemented in autumn 2017.	CBT team	<b>September 2017</b>	On track.
2.	11 May 2017	<b>Improvement of Grants Budget</b> Report to Resource Allocation Sub Committee and the City Bridge Trust Committee considering how the approach to the grants budget might be improved and clarification on accounting for multi-year commitments.	CBT Team and Chamberlain	<b>September 2017</b>	On track
3.	15 June 2017	<b>Review of Terms of Reference</b>	CBT Team and Town Clerk	<b>January 2018</b>	On track

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<b>Committee:</b> City Bridge Trust	<b>Dated:</b> 27 <sup>th</sup> July 2017
<b>Subject:</b> Progress Report	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>

## Summary

This is a regular report by the Chief Grants Officer (CGO). You are asked within this report to note updates on the following:

- Strategic Review update
- London Metropolitan Archives and CBT's historic records
- Stepping Stones Fund
- London Emergencies Trust update
- The Way Ahead
- London's Giving
- Charity Commission charging consultation
- Charity Commission Charity Governance Code
- Human Resources update.

## Recommendation

- a) That the report be noted.

## Main Report

### Introduction

1. You will recall that you have agreed that each of the City Bridge Trust (CBT) Committee Meetings will begin with a presentation on a particular aspect of the work you support. Rather than invite a speaker to this meeting, David Farnsworth will be providing a brief verbal update on his and other team member's contributions to the Grenfell Fire Emergency Response team.

### Strategic Review Update

2. Since our last meeting, your Head of Strategic Review has presented the finalised strategy to the City of London Corporation's Chief Officers' Group, which met on 21 June. The strategy was very well-received, and your CGO has been invited to a meeting later in the year to discuss in more detail potential options for various departments from across the Corporation to support with its implementation.

3. Furthermore, the strategy has now been converted in to publication, thanks to the design expertise of 'Verde Creative', and it will be available as a hard copy and for download from our website in mid-to-late July. This is alongside a separate plain English, shortened version of the strategy, which was produced to an equally high standard by a user-led charity called 'People First (Self-Advocacy)'.
4. The strategy will be recommended for agreement to the Court of Common Council on 20 July. Given the level of engagement to date, we hope that it will be well-received and supported by Court, and we look forward to turning our attention fully to the implementation of the strategy from this date onwards. Indeed, the focus of our July team away day, scheduled for 20 July also, will consider carefully the implementation of the strategy in terms of the types of work we will support, the processes we will use, the skills needed to implement the strategy successfully and an opportunity to explore what the strategy means to the team as a whole and at an individual level.
5. By now, you should all have received an invitation to the event that we are organising on 24 July jointly with Trust for London. The event intends to update guests on the next funding strategies of CBT and the Trust and thank them for their support with this work.

### **London Metropolitan Archives and CBT's historic records**

6. The grant making arm of Bridge House Estates has been operational since 1995, making 7,676 awards with a total value of £370m. Detailed records are produced for each grant awarded, including not only what is provided to the Trust by way of application and subsequent monitoring, but also what is produced by officers following assessment and site visits. Files are kept at the Trust's offices until accounts are received from the grantee covering the full period of funds drawn down and spent. At this point paper records are scanned and the hard-copy documents sent to secure storage.
7. Quite extensive records now exist in secure storage, with many grant files dating much further back than the mandatory minimum 6 year retention period stipulated by the 2011 Charities Act. The oldest files have no practical value for grant management purposes, and are now are very unlikely to ever be required for purposes of fraud investigations or any legal action. However, as London's largest independent grant-making Trust, the City Bridge records contain a rich history of the capital's voluntary and community sector, and could be of significant interest to researchers.
8. Discussions are now underway with London Metropolitan Archives as to how this material may be preserved.

### **Stepping Stones Fund**

9. The fourth round of the Stepping Stones Fund is well underway. This is our social investment readiness programme run in partnership with UBS. Stepping Stones has distributed £2.2m to 49 organisations so far. Officers are



assessing detailed applications from 24 finalists ahead of interviews at UBS towards the end of July. We will be joined during the assessment process by representatives from several other organisations with an interest in the social investment space, including B Corps, Esmée Fairbairn Foundation, Trust for London and the Goldsmiths Company. £550,000 is available in the current round, although this amount may increase following writebacks and revocations on some previous awards where the full grant amount was not needed.

### **London Emergencies Trust update**

10. The London Emergencies Trust (LET) is tremendously grateful to the City Bridge Trust for the support that it has provided in terms of manpower, resources and expertise to support our work. LET is the authorised distributor of funds collected by the British Red Cross and others for the bereaved families and hospitalised survivors of the three recent terrorist attacks in London (Westminster, London Bridge and Finsbury Park) as well as for the Grenfell Tower disaster.
11. We are working closely with the Metropolitan Police, their family liaison officers, humanitarian assistance centres, Victim Support and a range of keyworkers, community centres and support staff, to ensure that we reach all those who are eligible for our funding. LET is one of three distributing bodies – alongside the Kensington & Chelsea Foundation and the London Community Foundation (the latter in partnership with the Evening Standard), although our remit, working with the bereaved and hospitalised is unique.
12. LET builds on the expertise and experience of staff and trustees who ran the disaster fund in the wake of 7/7, which is proving to be incredibly helpful in framing how we work. LET is also in close contact with those running the We Love Manchester fund and advised them in their earliest days about best practice and operation.

### **Further strengthening the voluntary sector**

13. You may re-call that you funded research, commissioned through your grantee London Funders (the membership network for funders and investors in London's civil society), into the future of infrastructure support for London's voluntary. London Funders led this research, working in close partnership with two key infrastructure bodies, London Voluntary Services Council (LVSC: (the umbrella body for the council of voluntary service network) and Greater London Volunteering (GLV: which co-ordinates local volunteer centres) . The resulting report, *The Way Ahead*, was launched in April 2016 at Guildhall.
14. The starting point for this research was three beliefs: first, that London needs a vibrant civil society to prosper; second, that in order to achieve a strong and vibrant civil society, just as any other sector in London, civil society needs access to appropriate business, technical and enterprise support, as well as a 'voice' within the on-going debate about London, its governance and the issues it faces; and third that the challenges presented by the current

economic situation provide opportunities to review and re-think how that support is provided to London's civil society.

15. At your November 2016 Committee meeting, you received a report recommending that two funds be established to support the infrastructure of London's civil society. This is to update Members of progress since then.
16. The first of the two funds, *The Bridge Fund*, comprised £1m to enable London-wide civil society organisations to engage with the development of *The Way Ahead*, with grants of up to £50,000 per organisation. In the event, 15 grants were awarded through Delegated Authority, totalling £737,000.
17. The second fund, *The Cornerstone Fund*, is a sum of £1.5m per annum for two years, making £3m in total, to enable the Trust to work with other funders and key stakeholders, to support the infrastructure underpinning London's civil society. The parameters for this fund are currently under development.
18. Following the launch of *The Way Ahead*, a 'Systems Change' group was established with representation from public, private and voluntary, community and social enterprise sectors, to take the report's recommendations forward. In addition, five 'task and finish' groups were established to look at the following topics:
  - Co-production
  - Triage and connect
  - Voice and campaigning
  - Data
  - Consistent commissioning
19. These groups are now complete with their respective reports and recommendations published.
20. LVSC and GLV have been working together to establish the London Hub, which will replace the functions of these two organisations, as well as taking forward the wider ambitions of *The Way Ahead* report, with GLV being the vehicle for this new body. This is on track to be set up by September 2017.
21. A stakeholder conference was held on 22<sup>nd</sup> June 2017, attended by around 120 organisations, in order to update the sector on progress with *The Way Ahead* and at which the Deputy Chief Grants spoke from the Trust's perspective.
22. The Deputy Chief Grants Officer is leading on the development of the Cornerstone Fund, working closely with London Funders. We are in the process of commissioning Rocket Science to undertake a mapping exercise of what civil society infrastructure support is already in place, to help identify gaps in provision and also to identify who is funding what in this arena. Although pockets of information exist, there is no central picture. It is hope that the mapping will not only help the development of the Cornerstone Fund but that it will also be beneficial to the sector more widely.

23. A reference group for the Cornerstone Fund has been established which has its first meeting on 10<sup>th</sup> July 2017. The group comprises representatives from London Funders, London Voluntary Services Council, Greater London Volunteering, Heart of the City, Partnership Young London, Greater London Authority and London Councils. It is hoped that other funders will join the group in time.
24. Bilateral discussions are starting with other funders who may be interested in collaborating with the fund, be this directly or indirectly. Following these discussions, it is hoped to hold a round table for funders in September, jointly with London Funders. The date for this is yet to be confirmed. Following this it is planned to hold a consultation meeting for relevant voluntary sector organisations.
25. Whilst the exact parameters and governance arrangements for the Cornerstone Fund remain in development, it is anticipated that the first funding decisions can be made early in 2018. However, before that, it is highly likely that funding will be needed to be approved in September 2017 towards the first year's costs of the London Hub. A full report on this will be brought to that meeting.

## **London's Giving**

26. You may recall that at your March 2017 meeting you approved a grant of £300,000 over three years for London Funders to continue the development of the London's Giving place-based giving initiative. The grant was subject to two conditions. Firstly, that a consultancy contract be awarded following an open tendering process. The second was that the post of Project Manager within London Funders (filled with a temporary contract at the time the grant was awarded) be filled through an open recruitment process.
27. With regard to the consultancy to deliver the next phase of London's Giving, bids were invited to deliver one or more of the following objectives:
  - To provide tailored support for local giving schemes
  - To maintain and extend the learning network
  - To develop a knowledge hub on place-based giving
  - To establish a sustainable future for place-based giving in London.
28. Eight bids were received, four of which were shortlisted for interview. The Deputy Chief Grants Officer was part of the panel, with interviews taking place on 15<sup>th</sup> June 2017. The successful applicants were Clare Thomas and Deborah Xavier (who had undertaken the first phase of this project) together with Rocket Science.
29. With regard to the second condition of grant, in the light of the recent resignation of the current London Funders' Director, together with the impact on the organisation of recent, tragic events in London, a variation of grant has been approved to allow for continuity in the organisation by retaining the

current, temporary Project Manager until six months into the appointment of the new Director of London Funders.

30. In addition to supporting the strategic development of London's Giving, you are also supporting the development of a number of local giving schemes. Most of these grants were one-year awards and some of these are now approaching the fund for continuation funding. It is recommended that you take each request on its merit based on an assessment of the extent to which further support from you will enable the scheme to get to the next stage of its development and the extent to which further support from you will enable the scheme to leverage funds from other sources. The first of these, Lewisham Local (applicant: Rushey Green Time Bank) is amongst the grant recommendations in today's papers. A proposal from Sutton Giving is currently under assessment for a decision by delegated authority, as the amount requested is less than £50,000 and a request is anticipated from Camden Giving.

### **Charity Commission Charging consultation**

31. William Shawcross, chair of the Charity Commission, has said that the regulator is "about to embark on a more formal process" of consulting the sector about plans to introduce a levy to help fund the regulator.
32. The consultation has been hotly anticipated within the sector, with the regulator often promising that it would launch soon. However the regulator has been awaiting approval from the government.
33. Mr Shawcross said that he had some "regret" over charging, but in his view it was "inevitable" to make the Commission sustainable. The Commission said that it considered charities with an income under £100,000 to be too small to pay but that they were looking at a graduated levy system with the smallest charities paying £75 and the largest £1,750.
34. The Commission have no proposals for how to treat charities whose income may be slightly over £100,000 one year due to a one-off payment, but then drop back, but that it could be considered in the consultation process.

### **Charity Commission Charity Governance Code**

35. The Charity Commission has now launched the new Charity Governance Code, with the previous guidance known as the Hallmarks of an Effective Charity being withdrawn. The new code introduces a principle of 'apply or explain' which will require charities to explain in their annual report where they do not comply with the Code.
36. The Head of Charity & Social Investment Finance will be undertaking a review of the implications of the changes that this will bring to the governance of CoLC's various charities over the coming weeks, bearing in mind that there are 2 versions of the Code – one aimed at larger charities (basically over £1m

income, although other complexities may need to be considered) and one at smaller charities.

37. For those of you keen to know more in advance of this, details can be found at - <https://www.charitygovernancecode.org/en>.

### **Human Resources Team Update**

38. Head of Philanthropy Strategy: The interview process is still on-going for this role and an update will be provided to this Committee once the post has been filled.

39. Grants Administrator: Elizabeth (Lily) Brandhorst has now been recruited to the 12 month fixed term Grants Administrator role. Lily currently works for the Nordiff Robins Music Therapy charity and will be in post by September 2017.

40. Social Investment Fund Associate: 4 candidates have been shortlisted and interviews have been scheduled for the 5th and 14th July. Further updates will be provided to this Committee once an appointment has been made.

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Risk Register for Bridge House Estates (charity number: 1035628)	<b>Public</b>
<b>Report of:</b> Chamberlain and Chief Grants Officer	<b>For Decision</b>
<b>Report author:</b> Steven Reynolds, Chamberlain's Department	

## Summary

The report provides this Committee's section of the key risks register for Bridge House Estates (BHE) for review. The Charity Commission's Statement of Recommended Practice (SORP) requires that the register is reviewed annually to ensure that existing risks are reconsidered, any new risks are identified and that appropriate measures are in place to mitigate those risks. BHE is managed by six Committees or Boards, each of which is required to review and monitor risks for the services they oversee e.g. the Planning and Transportation Committee manages risks relating to the five bridges maintained by the Trust. Accordingly, a separate risk report has been prepared for each managing Committee or Board.

Three of the risks on the BHE risk register relate to the services overseen by the City Bridge Trust Committee. These relate to financial loss through fraud or theft, negative publicity leading to reputational damage and major IS systems failure – the three risks are detailed at Appendix 2. The first two risks are assessed as green with a score of two (on a risk scale from one to the highest risk score of thirty two), the third risk is also assessed as green but with a score of three. All three risk scores remain unchanged compared to last year.

## Recommendations

Members are asked to:

1. review the three risks currently on the register for this Committee and confirm that appropriate control measures are in place; and
2. confirm that there are no other risks relating to the services overseen by the City Bridge Trust Committee which should be added to the BHE risk register.

## **Main Report**

### **Background**

1. In accordance with the Charity Commission's Statement of Recommended Practice (SORP), trustees are required to confirm in the charity's annual report that any major risks to which the charity is exposed have been identified and reviewed and that systems are established to mitigate those risks. This Committee's section of the key risks register for Bridge House Estates (BHE) is set out for review.
2. BHE is managed by six Committees or Boards each of which is required to review and monitor risks for the services they oversee e.g. the Planning and Transportation Committee manages risks relating to the five bridges maintained by the trust. Accordingly, a separate risk report has been prepared for each managing Committee or Board.
3. The Charities SORP requires that the register is reviewed annually to ensure that existing risks are reconsidered and any new risks are identified.

### **Review of Risks**

4. The method of assessing risk reflects the City of London's standard approach to risk assessment as set out in its Risk Management Strategy approved by the Audit and Risk Management Committee. The City of London Corporation risk matrix, which explains how risks are assessed and scored, is attached at Appendix 1 of this report. Risk scores range from one, being lowest risk, to the highest risk score of thirty two. These scores are summarised into 3 broad groups, each with increasing risk, and categorised green, amber or red.
5. Each risk in the register has been considered by the responsible officer within the Corporation who is referred to as the 'Risk Owner' in the register.
6. The City Bridge Trust Committee's element of the BHE risk register is shown at Appendix 2 and contains three risks, the first relating to financial loss through fraud or theft, the second to negative publicity leading to reputational damage and third, major IS failure. Controls are in place to mitigate these risks, including an open, transparent and rigorous grants assessment process and, in relation to IT systems, the main grants system GIFTS now running from an Agilisys data centre which is more resilient than the previous server at Guildhall. The first two risks are assessed as green with a score of two (on a risk scale from one to the highest risk score of thirty two) while the third risk is also assessed as green but with a score of three. All three risk scores remain unchanged compared to last year and the current mitigating actions are considered appropriate at this time.

### **Conclusion**

7. The risks faced by the charity have been reviewed and three of those risks have been identified as relating to the services overseen by the City Bridge Trust Committee. The first relates to financial loss through fraud or theft, the second to negative publicity leading to reputational damage and the third to major IS failure.



The Committee is requested to confirm that appropriate control measures are in place for these risks and that there are no other risks that should be added to the BHE register in relation to services overseen by the Committee.

### **Appendices**

- Appendix 1 - City of London Corporation Risk Matrix
- Appendix 2 - Charity Risk Register

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### City of London Corporation Risk Matrix (Black and white version)

Note: A risk score is calculated by assessing the risk in terms of likelihood and impact. By using the likelihood and impact criteria below (top left (A) and bottom right (B) respectively) it is possible to calculate a risk score. For example a risk assessed as Unlikely (2) and with an impact of Serious (2) can be plotted on the risk scoring grid, top right (C) to give an overall risk score of a green (4). Using the risk score definitions bottom right (D) below, a green risk is one that just requires actions to maintain that rating.

#### (A) Likelihood criteria

	Rare (1)	Unlikely (2)	Possible (3)	Likely (4)
Criteria	Less than 10%	10 – 40%	40 – 75%	More than 75%
Probability	Has happened rarely/never before	Unlikely to occur	Fairly likely to occur	More likely to occur than not
Time period	Unlikely to occur in a 10 year period	Likely to occur within a 10 year period	Likely to occur once within a one year period	Likely to occur once within three months
Numerical	Less than one chance in a hundred thousand (<10-5)	Less than one chance in ten thousand (<10-4)	Less than one chance in a thousand (<10-3)	Less than one chance in a hundred (<10-2)

#### (B) Impact criteria

Impact title	Definitions
Minor (1)	<b>Service delivery/performance:</b> Minor impact on service, typically up to one day. <b>Financial:</b> financial loss up to 5% of budget. <b>Reputation:</b> Isolated service user/stakeholder complaints contained within business unit/division. <b>Legal/statutory:</b> Litigation claim or find less than £5000. <b>Safety/health:</b> Minor incident including injury to one or more individuals. <b>Objectives:</b> Failure to achieve team plan objectives.
Serious (2)	<b>Service delivery/performance:</b> Service disruption 2 to 5 days. <b>Financial:</b> Financial loss up to 10% of budget. <b>Reputation:</b> Adverse local media coverage/multiple service user/stakeholder complaints. <b>Legal/statutory:</b> Litigation claimable fine between £5000 and £50,000. <b>Safety/health:</b> Significant injury or illness causing short-term disability to one or more persons. <b>Objectives:</b> Failure to achieve one or more service plan objectives.
Major (4)	<b>Service delivery/performance:</b> Service disruption > 1 - 4 weeks. <b>Financial:</b> Financial loss up to 20% of budget. <b>Reputation:</b> Adverse national media coverage 1 to 3 days. <b>Legal/statutory:</b> Litigation claimable fine between £50,000 and £500,000. <b>Safety/health:</b> Major injury or illness/disease causing long-term disability to one or more people <b>Objectives:</b> Failure to achieve a strategic plan objective.
Extreme (8)	<b>Service delivery/performance:</b> Service disruption > 4 weeks. <b>Financial:</b> Financial loss up to 35% of budget. <b>Reputation:</b> National publicity more than three days. Possible resignation leading member or chief officer. <b>Legal/statutory:</b> Multiple civil or criminal suits. Litigation claim or find in excess of £500,000. <b>Safety/health:</b> Fatality or life-threatening illness/disease (e.g. mesothelioma) to one or more persons. <b>Objectives:</b> Failure to achieve a major corporate objective.

#### (C) Risk scoring grid

		Impact			
		Minor (1)	Serious (2)	Major (4)	Extreme (8)
Likelihood	X				
	Likely (4)	<b>4 Green</b>	<b>8 Amber</b>	<b>16 Red</b>	<b>32 Red</b>
	Possible (3)	<b>3 Green</b>	<b>6 Amber</b>	<b>12 Amber</b>	<b>24 Red</b>
	Unlikely (2)	<b>2 Green</b>	<b>4 Green</b>	<b>8 Amber</b>	<b>16 Red</b>
	Rare (1)	<b>1 Green</b>	<b>2 Green</b>	<b>4 Green</b>	<b>8 Amber</b>

#### (D) Risk score definitions

<b>RED</b>	Urgent action required to reduce rating
<b>AMBER</b>	Action required to maintain or reduce rating
<b>GREEN</b>	Action required to maintain rating

This is an extract from the City of London Corporate Risk Management Strategy, published in May 2014.

Contact the Corporate Risk Advisor for further information. Ext 1297

October 2015

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**BHE Risks to be considered by the CITY BRIDGE TRUST COMMITTEE**

Risk No.	Risk (Short description)	Risk Owner	Committee	Existing Controls	Current Risk				Planned Actions	Target Risk		
					Likelihood	Impact	Rating	Direction		Likelihood	Impact	Rating
<b>Grants</b>												
1	Financial loss through fraud or theft.	Chief Grants Officer	The City Bridge Trust	Rigorous grants assessment and grants management systems. Comprehensive checks and balances before payments authorised. Regular internal and external audits (e.g. Due Diligence Review by Internal Audit completed January 2017 which confirmed the Trust has robust controls in place).	Rare	Serious	Green 2	↔	Continue with current course of action	Rare	Serious	Green 2
2	Negative publicity and damage to the City of London Corporation's reputation.	Chief Grants Officer	The City Bridge Trust	The Trust operates an open and transparent grant assessment and decision-making process. It works closely with City of London's Communication Department in delivering a shared communications strategy (recently enhanced by more communications capacity in both teams).  It updated its Communication Strategy during 2016-17 and a communications plan will form a major part of the Strategic Review during 2017-18.	Rare	Serious	Green 2	↔	Continue with current course of action	Rare	Serious	Green 2
3	Major failure in IS systems leading to significant disruption to business: in particular, the Gifts grants management database and potential financial or reputational loss.	Chief Grants Officer	The City Bridge Trust	Gifts is now running from one of the Agilisys data centres located at Welwyn Garden City, which is more resilient than the original servers at the Guildhall. If the Agilisys data centres fail then the service will be resumed within 6 hours. Backups are stored there initially and then moved to Hammersmith. The Gifts database is backed up daily and the previous two days can be recovered.	Possible	Minor	Green 3	↔	Continue with current course of action	Possible	Minor	Green 3

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Grant Applications – statistical summary	<b>Public</b>
<b>Report of:</b> Chief Grants officer	<b>For Information</b>

## Summary

This paper summarises applications received and action taken under your grants programmes this financial year, including those recommended for decision to this meeting. 40 applications will be dealt with at today's meeting, including 19 grant recommendations and 3 grants to be noted as approved by delegated authority under your Investing in Londoners programme, and 1 grant recommendation under your Infrastructure Support Anniversary programme. This leaves £10,362,103 remaining on your core budget for 2017/18 and £3,403,000 remaining on the Anniversary funds.

## Recommendations

Members are asked to:

- a) Note the report
- b) Consider the grant recommendations in the subsequent annexes

## Main Report

### Background

1. This paper summarises action taken and proposed this financial year on grant applications received under your Investing in Londoners grants programmes and your Anniversary 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.

### Grants Budget 2017/18

2. Table 1 below shows the grants budget for the current year; the total amount already committed in 2017/18; the amount recommended at this meeting; and the balance remaining. It also presents this information in more detail, per programme area.
3. Your meeting today will consider 39 applications under your Investing in Londoners programme, including 19 grant recommendations as well as 3 grants to be noted as approved by delegated authority, for a total recommended sum of £2,270,330. If all recommendations are approved you will have spent 36% of your Investing in Londoners core grants budget for 2017/18 - with four meetings remaining this financial year.
4. Your meeting will also consider 1 application of £300,000 under your Infrastructure Support Anniversary programme.

Table 1: Overall spend against 2017/18 budget

	Grants budget	Grants spend	Pending applications	% spend of annual budget
<b>Core 2017/18 Investing in Londoners grants budget</b>				
Original Grants Budget	£15,000,000			
20th anniversary budget uplift	£1,000,000			
Write-Backs & Revocations	£47,393			
UBS contribution	£50,000			
Carry forward 2016/17 (subject to approval)	£166,190			
<b>Total Budget Available</b>	<b>£16,263,583</b>			
<b>Previous Committee meetings</b>				
May 2017		£1,665,300		10%
June 2017		£1,965,850		12%
<b>Sub-total approved spend</b>		<b>£3,631,150</b>		<b>22%</b>
<b>Remaining budget</b>	<b>£12,632,433</b>			
<b>Today's recommendations</b>				
July 2017		£2,270,330		14%
<b>Total annual spend</b>		<b>£5,901,480</b>		<b>36%</b>
<b>Remaining budget</b>	<b>£10,362,103</b>			
<b>Proposed use of remaining budget</b>				
Submitted applications - under assessment			£3,137,386	19%
Stepping Stones			£545,000	3%
Strategic initiatives*			£540,000	3%
Available grants balance			£6,139,717	38%
<b>Summary</b>				
<b>Grants committed</b>		£3,631,150		22%
<b>Grants recommended</b>		£2,270,330		14%
<b>Balance remaining</b>	£10,362,103			64%

\*This figure does not include an additional and substantial request which would have skewed the overall picture



<b>Additional funding streams</b>				
	<b>Budget</b>	<b>Spend</b>	<b>Pending applications</b>	<b>% spend of annual budget</b>
<b>Anniversary programme: employability (20th anniversary budget uplift of 40%)</b>				
Carry forward from previous years	£2,735,000			
2017/18 new budget	£2,000,000			
<b>Total budget available</b>	<b>£4,735,000</b>			
Spend at previous meetings in 2017/18				
	May-17	£4,735,000		100%
Recommended spend today				
		£0		0%
<b>Total spend</b>		<b>£4,735,000</b>		<b>100%</b>
<b>Remaining budget</b>	<b>£0</b>			<b>0%</b>
<b>Summary</b>				
	<b>Spend committed</b>	£4,735,000		100%
	<b>Spend recommended</b>	<b>£0</b>		<b>0%</b>
	<b>Balance remaining</b>	<b>£0</b>		<b>0%</b>

<b>Anniversary programme: infrastructure support (20th anniversary budget uplift of 40%)</b>				
Carry forward from previous years	£1,713,000			
2017/18 budget	£2,000,000			
<b>Total budget available</b>	<b>£3,713,000</b>			
Spend at previous meetings in 2017/18				
		£0		0%
Recommended grant spend today				
		£300,000		8%
Recommended non-grant spend today*				
		£10,000		
<b>Total spend</b>		<b>£310,000</b>		<b>8%</b>
<b>Remaining budget</b>	<b>£3,403,000</b>			<b>92%</b>
<b>Summary</b>				
	<b>Spend committed</b>	£0		0%
	<b>Spend recommended</b>	<b>£310,000</b>		<b>8%</b>
	<b>Balance remaining</b>	<b>£3,403,000</b>		<b>92%</b>

\*This represents expenditure such as management costs, evaluation activity or related research that is recommend for approval but will not be awarded as a grant to another charity

<b>Annual funding for Prince's Trust funding (agreed Oct 14)</b>				
2017/18 budget	£1,000,000			
Balance to be drawn down	£1,000,000			
<b>Summary</b>				
<b>Balance remaining</b>	<b>£1,000,000</b>			<b>100%</b>

<b>Overall Grant Summary for 2017/18</b>				
	<b>Grants already committed</b>	£8,366,150		33%
	<b>Grants recommended today</b>	£2,580,330		10%
	<b>Balance remaining</b>	<b>£14,765,103</b>		<b>57%</b>

5. Table 3 shows the grant awards you have made this financial year under Investing in Londoners and today's recommendations by programme.<sup>1</sup>

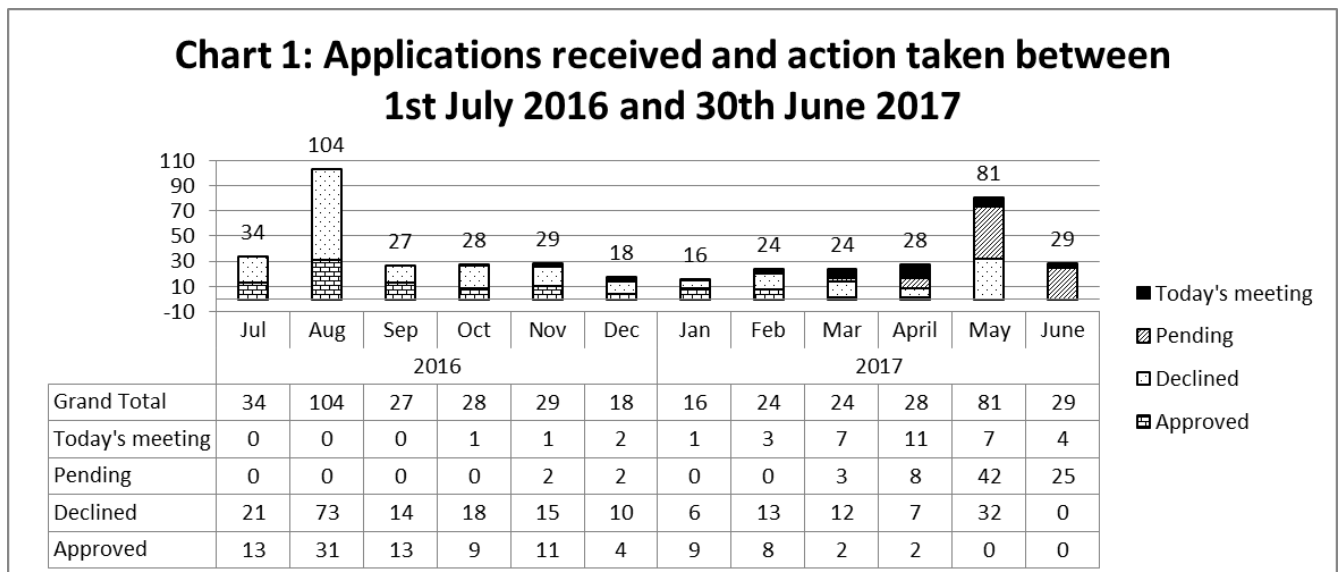
**Table 3: Investing in Londoners awards and recommendations by programme**

Fund/Program	Number of grants				Value of grants			
	Year to date	Today's meeting	Total	% total grants	Year to date	Today's meeting	Total	% total value
English for Speakers of Other Languages	0	2	2	4%	£0	£196,800	£196,800	3%
Improving Londoners' Mental Health	4	0	4	7%	£286,950	£0	£286,950	5%
Improving London's Environment	2	1	3	5%	£185,000	£113,000	£298,000	5%
Making London More Inclusive	6	2	8	14%	£782,450	£208,450	£990,900	17%
Making London Safer	3	1	4	7%	£299,400	£103,700	£403,100	7%
Older Londoners	4	5	9	16%	£354,300	£554,300	£908,600	15%
Reducing Poverty	4	1	5	9%	£390,840	£108,400	£499,240	8%
Resettlement & Rehabilitation of Offenders	1	2	3	5%	£90,000	£163,300	£253,300	4%
Stepping Stones	0	0	0	0%	£0	£0	£0	0%
Strengthening London's Voluntary Sector	2	3	5	9%	£230,000	£294,500	£524,500	9%
Strategic Initiatives	5	2	7	13%	£1,000,720	£522,340	£1,523,060	26%
Eco-audits	2	2	4	7%	£5,600	£4,600	£10,200	0%
Access Audits	1	1	2	4%	£890	£940	£1,830	0%
<b>Grand total</b>	<b>34</b>	<b>22</b>	<b>56</b>	<b>100%</b>	<b>£3,626,150</b>	<b>£2,270,330</b>	<b>£5,896,480</b>	<b>100%</b>

The 26% value of Strategic Initiatives relates to the total spend *in the year to date* and is a consequence of timing. As your overall budget for these is 20% of the *total annual value of the core grants budget* further spend in this area will be monitored to ensure you do not overspend.

<sup>1</sup> Making London More Inclusive excludes access audits which are shown separately.

6. Chart 1 shows the flow of applications received over the last year and action taken, allowing any seasonal variations to be seen. This excludes Strategic Initiatives as they are usually solicited rather than open programmes.



7. Between 1<sup>st</sup> July 2016 and 30<sup>th</sup> June 2017, 442 applications were received for the Investing in Londoners programmes. Excluding the applications being considered at this meeting, 102 applications have been approved, 221 declined and 82 are pending. The spikes in applications seen in August 2016 and May 2017 are due to the closing date for rounds of the Stepping Stones Fund. Otherwise applications are fairly evenly spread across the year, which is comparable to previous years.
8. There are 4 applications shown as pending and which were received in late 2016. The delay in bringing these to you for decision has been due, in most cases, to the individual organisations being slow in responding to requests for additional information and/or have had staff changes which has delayed the assessment process. Your officers' patience in these circumstances has been applied as the work proposed is potentially of value. Two of the applications are small requests which are likely to be recommended for approval under delegated authority before the end of this month.
9. Officers are asking you to consider 40 applications at this meeting, as presented in the subsequent annexes and reports. Of these, 20 are recommended for a grant and 3 are reported as having been approved under the scheme of delegations. A further 4 are recommended for rejection, 10 applications have been withdrawn by applicants and 3 have been lapsed following several unsuccessful attempts by officers for further information. Table 4 provides a summary.

**Table 4: Action to be taken on applications today****Investing in Londoners**

<b>Action to be taken</b>	<b>Number</b>	<b>Amount</b>
Applications recommended for grant to Committee	19	£2,264,790
Funding approved by delegated authority up to £10,000 (to note)	3	£5,540
Funding approved by delegated authority from £10,001 - £25,000 (to note)	0	£0
Funding approved by delegated authority from £25,001 - £50,000 (to note)	0	£0
Applications recommended for rejection	4	n/a
Withdrawn applications (to note)	10	n/a
Applications lapsed (to note)	3	n/a
<b>Total Investing in Londoners applications</b>	<b>39</b>	<b>£2,270,330</b>

<b>Anniversary Programme: Infrastructure Recommended for grant to Committee</b>	<b>1</b>	<b>£300,000</b>
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**Grants in Management**

10. The total of grants currently under the on-going management of your Grants Officers is shown in Table 5. Prior to the approvals recommended for this Committee, the total sum for grants currently being managed (and grant related expenditure) is £31,000,839. Should the Committee approve the applications proposed at today's meeting, this balance will rise to £33,581,169.

**Table 5****Grant commitments under management as at 30th June 2017**

<b>Table for 2017/18 year-to-date</b>	<b>£</b>	<b>£</b>
Prior year grant commitments brought-forward as at 31 March 2017		27,600,000
Grant awarded in 2017/18	8,366,150	
Grant write-backs in 2017/18	<u>(47,393)</u>	
		8,318,757
Payments made in 2017/18 to Grantees		(4,917,918)
<b>Current grant commitments as at 30th June 2017</b>		<b><u>31,000,839</u></b>

**David Farnsworth**

Chief Grants Officer

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## INDEX OF GRANT RECOMMENDATIONS

Ref No.	Organisation	Requested Amount	Recommended Amount
<b><u>Anniversary Programme: Infrastructure Support</u></b>			
a)	14158 John Lyon's Charity	£0	£300,000
	<i>Anniversary Programme: Infrastructure Support Total</i>	£0	£300,000
	<b>Grand Total for Anniversary Programme</b>	<b>£0</b>	<b>£300,000</b>
<b><u>Investing in Londoners</u></b>			
<u>Strategic Initiatives</u>			
b)	14127 Participatory City Foundation	£0	£450,000
c)	14157 Rushey Green Timebank (RGTB)	£0	£72,340
	<i>Total Strategic Initiatives</i>	£0	£522,340
<u>English for Speakers of Other Languages</u>			
d)	13863 All Hallows Bow	£89,195	£146,400
e)	14017 Islington Centre for Refugees and Migrants	£75,000	£50,400
	<i>Total English for Speakers of Other Languages</i>	£164,195	£196,800
<u>Improving London's Environment</u>			
f)	14004 Rushey Green Timebank (RGTB)	£111,663	£113,000
	<i>Total Improving London's Environment</i>	£111,663	£113,000
<u>Making London More Inclusive</u>			
g)	13753 Disability Sports Coach	£139,744	£139,800
h)	13972 Park Theatre	£82,074	£68,650
	<i>Total Making London More Inclusive</i>	£221,818	£208,450
<u>Making London Safer</u>			
i)	13860 Stay Safe East	£103,690	£103,700
	<i>Total Making London Safer</i>	£103,690	£103,700
<u>Older Londoners</u>			
j)	13990 Arts 4 Dementia	£75,000	£75,000
k)	14003 Ashford Place	£84,914	£99,900
l)	14002 Bexley Crossroads Care Limited	£181,363	£155,000
m)	13866 Eritrean Community in the UK	£74,028	£70,500
n)	13864 Queens Crescent Community Association (QCCA)	£199,396	£153,900
	<i>Total Older Londoners</i>	£614,701	£554,300

	<b>Ref No.</b>	<b>Organisation</b>	<b>Requested Amount</b>	<b>Recommended Amount</b>
<u>Reducing Poverty</u>				
	o)	13922 Plan Zheroes	£123,070	£108,400
	<i>Total Reducing Poverty</i>		£123,070	£108,400
<u>Resettlement and Rehabilitation of Offenders</u>				
	p)	13996 Carney's Community	£69,654	£69,600
	q)	14010 Synergy Theatre Project	£93,709	£93,700
	<i>Total Resettlement and Rehabilitation of Offenders</i>		£163,363	£163,300
<u>Strengthening London's Voluntary Sector</u>				
	r)	14021 Aston-Mansfield	£143,496	£144,000
	s)	13989 Enfield Voluntary Action	£118,110	£100,500
	t)	14020 Voluntary Action Islington Limited	£52,826	£50,000
	<i>Total Strengthening London's Voluntary Sector</i>		£314,432	£294,500
<b>Grand Total for Investing in Londoners</b>			<b>£1,816,932</b>	<b>£2,264,790</b>

<b>Committee</b>	<b>Dated:</b>
<b>City Bridge Trust</b>	27 <sup>th</sup> July 2017
<b>Subject:</b> Young People's Foundations - a joint initiative with the John Lyon's Charity	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

## Summary

Building further on your commitment to strengthen the voluntary and community sector in London, this report seeks approval to extend the financial support given by your Committee in September 2015 for the establishment and development of Young People's Foundations in Brent, Barnet and Harrow. Should you approve the grants recommended these will be delivered through entering into a funding arrangement with another grant-making trust – the John Lyon's Charity – for the sum of £300,000.

## Recommendations

1. Note the report.
2. Approve a grant of £300,000 to the John Lyon's Charity to co-fund the salary and running costs of the Young People's Foundations for one year in each of the boroughs of Brent, Harrow and Barnet. The grant would be costed against your Anniversary Programme for infrastructure support.

## Main Report

### Background

1. The John Lyon's Charity (JLC) is an independent grant-making trust and has a history which, in part, mirrors that of the City Bridge Trust. Although it has been distributing grants only since 1992, the Charity and its endowment are constituted still on the basis of a 16<sup>th</sup> Century Royal Charter granted by Elizabeth I.
2. John Lyon was a yeoman farmer from the village of Preston in Harrow. In 1572 he was granted a Royal Charter by Elizabeth I to found a free grammar school for boys: Harrow School. The Charter anticipated that John Lyon would endow a trust for the purpose of maintaining the two roads between London and Harrow, now the Edgware and Harrow roads, which he did in 1578 by leaving a farm and estate of 48 acres.

3. John Lyon's Foundation consists of Harrow School (the original school), The John Lyon School (established in 1876 as a day school to provide education for boys from the local community) and John Lyon's Charity. It is governed by the Keepers and Governors of the Free Grammar School of John Lyon, the Corporation that was established by the 1572 Charter. For over 400 years the income from the estate in Maida Vale went to the various authorities that were responsible for the upkeep of the two roads. In 1991, the Charity Commission scheme came into effect giving the Governors discretion to apply the income for charitable purposes for the benefit of the inhabitants of the boroughs of Barnet, Brent, Camden, Ealing, Hammersmith & Fulham, Harrow, Kensington & Chelsea and the Cities of London and Westminster – the boroughs served by the two roads.
4. The Governors of the Foundation are the Trustee of John Lyon's Charity. They have appointed a Grants Committee to oversee the Grants Programme and recommend awards for their approval. John Lyon's Charity (JLC) is a separate registered charity and is independent from the two schools. The Charity gives grants to benefit children and young people up to the age of 25, or their families, who live in the aforementioned nine boroughs. In 2016/17 £10.5m was spent on grants (479 awarded).
5. City Bridge Trust has had a strong and productive working relationship with John Lyon's Charity for over 13 years, going beyond mutual funding of the same organisations. JLC was one of the cohort of 5 funders (along with CBT) which came together in 2005 to devise and co-fund the multi-year *Fear & Fashion: Tackling Knife Crime* initiative. In more recent times officers from both CBT and JLC have worked very closely together through London Funders; whilst both parties (along with BBC Children in Need and London Youth) were co-organisers of the Youth Inclusion event at Mansion House in May 2015. Co-production and collaboration in this way supports better-informed funding and more effective use of resources. In very recent times both Trusts have been working together (and with others) to support the voluntary and community sector in the wake of the Grenfell tragedy.

### **Current Position**

6. In September 2015 you agreed a grant of £300,000 to JLC (as part of the additional funds allocated for infrastructure support as part of the Trust's Anniversary – see paragraph 12) to co-fund with them the establishment of a Youth Foundation in each of the boroughs of Brent, Barnet and Harrow – with £100,000 to each and matching a similar investment by JLC. At the time the concept of a Youth Foundation was completely new and was a response to the severe cuts in funding experienced by the youth sector – voluntary and statutory - across London and, especially, in the outer London boroughs. Reduced levels of funding are rendering many youth services unsustainable. In parallel, the switch amongst statutory funders from grants to commissioning has favoured larger organisations at the expense of smaller, often BME-led, ones as the smaller groups do not have the same capacity to tender for contracts. (In some boroughs, for example, contracts for borough-wide summer holiday activities are issued on



the basis that the Authority will only enter into a single contract, which automatically rules out small, local, providers.)

7. The underlying concept of the Youth Foundation was to create a single new body (a registered charity) which would act as a specialist borough infrastructure/membership organisation and which would provide a collective voice and pool of resources for all the local organisations, large and small, running activities for young people. It would establish close links with local businesses and statutory agencies. It would also, through its size, be able to bid for grants and contracts on behalf of its members. At the time of your initial investment those three Foundations were the pioneers. Since then, such has been the interest generated, several others have been established – or are being established – across London.
8. Young Brent Foundation, Young Barnet Foundation and Young Harrow Foundation have now been established as registered charities and have been operating for the best part of a year (a little longer in the case of Harrow). They each have full and diverse trustee boards and full staff teams. Membership is steadily climbing for all three – Barnet, for example, has 85 Community group members; plus local businesses and the council as Strategic Members; and individuals who are committed to the cause, as Friends. All three Foundations have strong links with their local authority; and all have now launched their own Small Grant Funds for their member organisations. Their power to commission has started to bear fruit – Harrow, for example, has recently secured £518,000 of funding for the voluntary sector in the borough from sources including the Mayor's Office of Policing and Crime (MOPAC) and London Sport.
9. Prior to 2016 (following research supported by the Trust and by the local knowledge of JLC) these three boroughs had youth sectors that were in a perilous state but which are now beginning to consolidate and flourish thanks to the work of the individual Foundations and the model now attracts visitors from around the country to look at how to deliver collaborative working such as they embody. The model has been adopted in several other London boroughs and, indeed in other UK cities, thanks to the advocacy of JLC.
10. In order to maintain the momentum and to build on early success you are asked to consider continuing your support for another year. Such support – delivered through a similar co-funding model with JLC as before – would give each Foundation additional financial breathing space to establish its own sustainability. A similar level of funding as before is sought (£100,000 each) as, currently, none of the Foundations take monies from the funds they raise for their members and are therefore reliant on the joint support of JLC and your Trust. In the longer term this will change, of course, but in the meantime they prefer to direct all other funds raised to the benefit of their members – many of whom have been at the sharp end of sector-wide cuts and need whatever their Foundation can pass on.
11. Not all of the three Foundations are in a position as yet to produce their own independent accounts for a full year of operation, hence the proposal to support them – as before – through the aegis of the John Lyon's Charity. Whilst this model provides a substantial level of protection to your investment it also has the

benefit of tapping into the specialist and unique knowledge of the JLC staff who have day-to-day engagement with the Foundations and who can provide expert, local, management of the grant in excess of anything your own officers could provide.

12. If you approve the grant as recommended it will be costed against your *Anniversary programme – infrastructure support*, the primary purpose of which was to establish the Bridge Fund and the Cornerstone Fund (an update on which is provided elsewhere in your papers for this meeting). The rationale for including the Youth Foundations' support in this strand is that it represents an important and unique element of community sector support and complements the aims of the wider Way Ahead agenda.

### **Potential support to Kensington & Chelsea**

13. When you committed to the three Foundations in 2015 it was on the understanding that these, being new and untested models of working, would act as pilot schemes and that other requests for similar ventures in other parts of London would not be considered – at least until the model had been tested.
14. John Lyon's Charity has been working closely over the past 6 months with the statutory and voluntary youth sectors in Kensington & Chelsea as they were keen to establish their own Foundation. With the recent tragedy at Grenfell Tower in the north of the borough the need for a co-ordinated and wide-ranging package of support to the young people there, in particular, has become acute. Therapists within the local Children and Mental Health Services (CAMHS) team have voiced the importance and therapeutic value of engaging young people in positive recreational and social activity as well as in talking therapies. JLC – which has Kensington & Chelsea as one of its constitutional boroughs of benefit – is co-ordinating the voluntary youth sector needs analysis following the Grenfell fire and knows the nature and structure of that sector there better than anyone. It (JLC) has spoken with your officers of the benefits of establishing a local Youth Foundation to bring groups together and to help develop a significant and sustainable response to the existing and future needs of young people across the whole borough but, in particular, those in north Kensington. Whilst this idea is currently under consideration locally there remains some way to go before a final decision is made as to whether or not to take this forward – but it may well be something that your Committee would want to consider supporting at the appropriate time and given the particular circumstances involved.

### **Financial observations**

15. The John Lyon's Charity does not maintain an unrestricted reserve as capital is available from the charity's endowment under the total return policy adopted. Draft accounts show that the permanent endowment fund had a value of £365,333,000 as at 31<sup>st</sup> March 2017. These funds are largely invested in property (£198.3m) and managed investments (£155.7m).

Year end as at 31st March	2016	2017
	Audited Accounts	Draft Accounts
	£	£
<b>Income &amp; expenditure:</b>		
Income	8,427,000	7,886,000
- % of Income confirmed	n/a	n/a
Expenditure	(11,805,000)	(13,110,000)
Surplus/(deficit)	(3,378,000)	(5,224,000)
Net gain on investments	4,877,000	27,572,000
Total surplus/deficit	<b>1,499,000</b>	<b>22,348,000</b>
Cost of Raising Funds	1,267,000	1,392,000
- % of income	9.5%	17.7%
Net assets held	342,985,000	365,333,000

## Conclusion

Your co-investment to date in the three pioneer Youth Foundations has been very successful, with each becoming an established charity with significant and diverse membership and proven ability to attract funds on behalf of its members. This grant, should you approve it, would help these three Foundations to become truly sustainable.

### Ciaran Rafferty

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Strategic Initiative: Participatory City Foundation (Ref: 14127)	Public
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

## Summary

This report recommends funding for the Participatory City Foundation (PCF) towards the first two years of an ambitious 5-year project in the London Borough of Barking and Dagenham to develop and support widespread, effective and sustainable community participation and cohesion. Based on a pilot project PCF delivered in West Norwood it is looking, now, to develop and scale up delivery across a whole borough, working closely with the local authority, local residents, voluntary agencies and businesses. PCF will work with local people to start dozens of different projects in neighbourhoods across Barking and Dagenham. These projects will enable many people to participate in a choice of 100 or more practical opportunities every week. PCF is planning to set up shops in different areas across the borough where experienced staff will work with local people to develop projects, activities and partnerships.

## Recommendation

Members are asked to agree:

- a) **£450,000 over two years (2 x £225,000) to the Participatory City Foundation to deliver the *Every One Every Day* neighbourhood project across the London Borough of Barking and Dagenham. Release of the grant is subject to confirmation of the organisation's registration as a charity.**

## Main Report

### Background

1. The London Borough of Barking and Dagenham is ranked the 9th most deprived in England. There are particularly high levels of need in the area, with its relative position against other London boroughs ranking bottom or near bottom across unemployment, exam results, homelessness, deprivation and low pay.
2. The Borough's demographics have changed rapidly over the last fifteen years, from 79% White British in 2001, to 49% in 2011. This has created a particular challenge for community cohesion, with a surge in support for parties such as

the BNP. In the June 2016 referendum, 62% of Barking & Dagenham residents voted to leave the EU, compared to the London average of 40%, whilst there has been a reported rise in hate crime since then.

3. Barking and Dagenham has a small voluntary sector (in terms both of number and size of organisations) and has long been identified as a Borough that receives less support from your Trust (and other funders) than might be expected given its high levels of disadvantage. As funding has been hard to place, the sector has struggled and key services supporting those most in need have been weakened, creating a vicious circle of increasing need met by decreasing capacity. A new, targeted, approach is needed – one which has the ability and resources to bring the whole community together to formulate a community-wide response to tackling disadvantage.

### **Current Position**

4. PCF has been set up to deliver the Participatory City neighbourhood project Every One Every Day in Barking and Dagenham. The organisation is currently a registered company limited by guarantee and is in the process of registering as a Charity. The organisation began in the form of a CIC, led by Tessy Britton, who has spent the last six years researching and prototyping new ways to support widespread practical participation. The largest scale test of this work to date, Open Works, ran in West Norwood, Lambeth in 2014 – 15. Over the course of a year the PCF team co-created a network of 20 practical projects including: cooking; skills sharing; play and childcare; and gardening projects. Over 1000 people took part and reported a range of positive outcomes. The research completed over the period confirmed that important outcomes can be achieved through small-scale participation but only when multiple actions, by many people, are added up over time. Scale is therefore a crucial element to success, with estimates that 10 – 15% of residents need to be participating regularly for wider, more significant, benefits to be felt throughout a neighbourhood.
5. 'Participation' can lead to a range of positive outcomes for individuals. It forms part of the academic concept of 'social capital', whereby civic engagement and involvement in community life can strengthen personal relationships, social network support and social trust. Measures of subjective wellbeing, happiness and satisfaction with life are strongly influenced by the extent of people's social networks and pro-social behaviour (doing things for others). Strong social relationships also have a positive impact on health outcomes, with the magnitude of the effect referenced as comparable to quitting smoking. At a community level, these outcomes are seen in improved economic output, reduced violent crime and improved educational performance.
6. In the UK, only 3% of people are involved in neighbourhood projects, but 60% say they would like to be involved in improving their neighbourhoods. This suggests that the barriers to growing and sustaining local projects are a structural and logistical challenge, rather than an innate human reluctance to participate. PCF seeks to remove these barriers, by ensuring participatory

projects are nearby, accessible, free or low cost, simple to understand, range from beginner to expert, are open to all and focussed on attracting people on the basis of talents rather than needs. The platform that sits behind the projects mean that it is not left to one individual to sustain and resource an activity, the infrastructure instead sits centrally as opposed to individually for lots of very small organisations.

7. The Every One Every Day programme will develop a range of projects over an initial two year period, working in collaboration with local businesses, the voluntary sector and Barking and Dagenham Council. Lankelly Chase Foundation, Esmée Fairbairn Foundation and Barking and Dagenham Council have been supporting the initial research and development for this programme. Recently, your officer has been working in collaboration with Esmée Fairbairn and the Big Lottery Fund on this initiative. Their co-funding is now confirmed, as is the funding and practical support from the local authority.
8. The project is designed specifically to be inclusive. There are three levels at which people can be involved, firstly, Participating: going along to an activity. Secondly, Hosting: running a Great Cook session and, thirdly, Initiating: developing a new project idea from scratch. It is intended that over time people will gain the skills and confidence required through participating to begin hosting and initiating. PCF is clear that individuals who are experiencing significant individual challenges are unlikely to be 'early adopters' and that none of the projects will be crisis-support services. They can, however, be an effective method of re-engaging individuals with the local community, and creating those supportive local networks that can prevent a return to crisis levels of need. PCF will work alongside and in partnership with local voluntary sector organisations across the borough.
9. Over the full five years of the programme PCF will support over 300 neighbourhood projects with 27,000 people involved regularly. Approximately 70 opportunities per week will be available within a five to fifteen minute walk of any resident's home, to achieve a minimum of 20% of local residents participating regularly in low commitment, imaginative, creative and socially beneficial activities. Ideas that have taken root elsewhere have been Trade Schools, self-organised learning spaces that run on non-financial bartering, BzzGardens that encourage bee friendly planting and shared food growing in public spaces and Great Cook where people come together to batch cook meals and take home portions for the week. The common characteristic is that project ideas are rooted in the needs and aspirations that people in communities have themselves expressed.
10. The setup of new projects is made possible by the support structure that PC puts in place, which will coordinate the design and testing of ideas, arrange insurance, find spaces, buy equipment, ensure health and safety, promote projects and track outcomes. The teams will be based in five high street shop HQs across the Borough, designed to be accessible spaces that people will wander in to discover more. There will also be more targeted outreach to engage local community, as well as referrals from voluntary and public sector bodies. The two years of support being recommended will help initiate the

setup of the project in an initial two areas of the borough, increasing to three in the second year.

## Outcomes

- a) *Residents of Barking & Dagenham have opportunities to learn and develop, improving their own lives and those around them.*
  - Project participants going on to take part on formal education/training; Increased numbers initiating local projects; Improvements in reported wellbeing; New friendships and support networks created, increased physical activity.
- b) *The Borough becomes a place where everyone feels safe, welcome and optimistic about the future.*
  - Reduction in hate crime; increased pride and ownership of open spaces; increased capacity within the community to respond to problems; building diverse social networks.
- c) *The benefits of participation at scale are evidenced, proven and documented for further replication.*
  - Network of 300 projects reaching 27,000 regular participants established; positive outcomes tracked and evidenced; all systems required for replication created.

## The organisation

11. PCF is a relatively new organisation that has been set up specifically to deliver this project in Barking and Dagenham. Your Committee does not usually consider supporting new organisations but it is felt that this is a unique – but tested - programme that is delivering a unique solution to a borough that, historically, funders have found difficult to support. Furthermore, the Trust would be one of several funders – the others being the Esmée Fairbairn Foundation; Big Lottery; and the London Borough of Barking & Dagenham. Tessy Britton, the CEO, has a track record of delivering projects of this kind and the support and close alliance of the local authority will provide a watchful eye on the growth of this work and ensure the stability of the new organisation. Your officer will closely monitor this project and be part of an Advisory Board to ensure that the project is delivering its stated outcomes and making good progress. An independent evaluation will take place concurrently with this project.
12. PCF is built on a strong research base and previous piloting. Coupled with a compelling need in Barking and Dagenham there is a chance to effect significant change. This is made more realistic by the close involvement of the Local Authority, who sees this project as key to achieving their new Borough Manifesto. They have made significant cash and in-kind pledges, and will also be the accountable body for any Big Lottery Funding. This level of commitment gives confidence that the initiative will not be swept aside by any



local authority change in direction. The LA also brings a wealth of knowledge about where the untapped resources are in the Borough that could be made use of, for example empty spaces. It is important to emphasise the sense of optimism from those in the Borough, that there are assets waiting to be unlocked in terms of ideas, skills and spaces, and the chance to re-design systems to more effectively meet local needs.

### **Financial considerations**

13. As a newly constituted organisation there are no previous finances to display. The budget figures that are displayed below are for the total costs of the PCF delivery in Barking and Dagenham, which is the sole work of the organisation. In the first two years of the project £1,200,000 has been secured for each year. Your funding will complete the total budget for the first two years, if awarded. As the funding of this programme has been a collaborative exercise between funders it is recommended that a contribution to the total cost of the project is made rather than supporting specific parts of the work. A more detailed expenditure breakdown is available on request.
14. PCF is looking at engaging other funders for the final three years of the project. Big Lottery has said they will consider a further application subject to the project meeting its outcomes.
15. Throughout the five years of delivery, PCF also plans to form and develop the Barking and Dagenham (B&D) Foundation. The neighbourhood teams will be transferred to the B&D Foundation, supported by an endowment established over the five years. The endowment will be similar in many ways to local Community Foundations across the country, but will support the participatory platform as opposed to distributing small grants. The endowment will be grown through local businesses, development projects and philanthropy. Fundraising efforts will be led by the local authority in Barking and Dagenham, who also plan to set up a community lottery to support this. The development of the Endowment has not been included in this budget as it will be initiated and managed by the council rather than PCF and will support the sustainability of the B&D Foundation in the future.
16. The budget and cash flow statement included below shows the blended funding stream and school income generation model; funders' grants allocation per year; and total expenditure. The overall grant income for Every One Every Day in Barking and Dagenham currently consists of four funding streams in addition to projected school revenue. Funding has been agreed by the London Borough of Barking Dagenham of £1.5 million with considerable in kind support, Big Lottery have confirmed £1 million over the first two years of the project, Esmée Fairbairn Foundation have confirmed an initial £1 million support over five years with the final grant pending this committee's decision.
17. Expenditure in the first year of the project is predicated on opening an initial two hubs which will require an initial investment in capital costs. An Independent Evaluation of the project will run concurrently throughout this project. All learning from the implementation will be shared widely with

partners and feed into the London's Giving network. Payments will be made quarterly but your officer will arrange monthly meetings in the first year of the grant to ensure the project is on track and receive management accounts.

	2017/18	2018/19	2019/2020	2020/21	2021/22	Total
<b>Grant Income</b>						
<b>Funders</b>						
LBBB	£300,000	£300,000	£300,000	£300,000	£300,000	£1,500,000
Big Lottery Fund	£500,000	£500,000				£1,000,000
Esmee Fairbairn	£400,000	£400,000	£100,000	£50,000	£50,000	£1,000,000
City Bridge Trust	£225,000	£225,000				£450,000
Future Funding			£990,000	£730,000	£730,000	£2,450,000
<b>Total Funding</b>	<b>£1,425,000</b>	<b>£1,425,000</b>	<b>£1,390,000</b>	<b>£1,080,000</b>	<b>£1,080,000</b>	<b>£6,400,000</b>
<b>School Revenue Generation</b>						
School Revenue Generation	£45,000	£210,000	£315,000	£420,000	£420,000	£1,410,000
<b>Total Income</b>	<b>£1,470,000</b>	<b>£1,635,000</b>	<b>£1,705,000</b>	<b>£1,500,000</b>	<b>£1,500,000</b>	<b>£7,810,000</b>
<b>Expenditure</b>						
Team Salaries	£741,045	£1,203,850	£1,220,625	£1,014,750	£1,014,750	£5,195,020
Premises: Lease and fit out	£60,000	£100,000	£120,000	£120,000	£120,000	£520,000
Technology and Metrics (IT)	£370,000	£25,000	£25,000	£25,000	£25,000	£470,000
Operational Costs	£67,000	£33,000	£42,000	£43,000	£43,000	£228,000
Premises Maintenance	£15,000	£30,000	£35,000	£35,000	£35,000	£150,000
Travel	£19,000	£19,000	£19,000	£19,000	£19,000	£95,000
Utilities	£18,000	£36,000	£42,000	£42,000	£42,000	£180,000
Marketing & Promotion	£36,000	£60,000	£72,000	£72,000	£72,000	£312,000
Technology	£20,000	£5,000	£10,000	£5,000	£5,000	£45,000
External Evaluation	£35,000	£40,000	£40,000	£40,000	£50,000	£205,000
Equipment	£40,000	£80,000	£75,000	£75,000	£75,000	£345,000
<b>Total Expenditure</b>	<b>£1,421,045</b>	<b>£1,631,850</b>	<b>£1,700,625</b>	<b>£1,490,750</b>	<b>£1,500,750</b>	<b>£7,745,020</b>
<b>Surplus/ Deficit</b>	<b>£48,955</b>	<b>£3,150</b>	<b>£4,375</b>	<b>£9,250</b>	<b>-£750</b>	
<b>Total Funds</b>	<b>£48,955</b>	<b>£52,105</b>	<b>£56,480</b>	<b>£65,730</b>	<b>£64,980</b>	

18. PCF will set up robust financial controls and has provided a detailed account of the governance arrangements for the new organisation. Key arrangements regarding financial controls are listed below:

19. **Project Team:** Will meet on a quarterly basis and will report to the funding board. Will have the oversight of the financial plan and will be responsible for financial oversight and board strategy. The project team will be made up of PCF Staff Members and designated Senior Officers from Barking and Dagenham Council.

20. **Working Group:** Will meet monthly but weekly for the first 6 months of the project. The working group will be responsible for overseeing and ensuring delivery of the project plan. Will have small scale strategy and financial oversight and will deal with issues that arise in the delivery of the project on an operational level. The Working group will also consist of a mix of PCF staff and council officers.
21. **Funding Board:** Quarterly meeting of all funders who will review the Development Report and will approve release of the next quarterly payments.
22. **PCF Board of Trustees:** Will meet bi-monthly and have financial and strategic oversight and approval. Currently they have 4 members on their board but are in the process of recruiting 5 more members to their board.
23. Appropriate Payment Authorisations are in place and in line with Charity Commission best practice. If funding is awarded it is intended that the first year payments are released quarter by quarter and subject to your officer's scrutiny to ensure that the project is being delivered to plan.

### **Conclusion**

24. This proposal represents a new response to an entrenched problem and is an excellent example of place-based working, bringing all resources in an area to bear (people, skills, physical assets etc) to improve the wider community and achieve the aspirations people have for the place they live. It will also engage a cohort of significant funders, working together with the local authority to improve the lives of several thousand disadvantaged people. PCF has agreed to share the learning and to fully engage with the London's Giving programme with initial meetings already in place.

**Jack Joslin**

Grants Officer

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## Summary Assessment of Strategic Initiative for Committee Decision

<b>FILTERS</b>	
<b><i>Will The pro-active grant:</i></b>	
Further the Trust's Vision and Mission (a fairer London & tackling disadvantage)?	<b>Yes</b>
Support work within one of existing Investing in Londoners programmes (IiL)?	<b>N/A</b>
Or, meet a clear need that has arisen since( IiL) were agreed?	<b>Yes</b>
Have the potential for impact beyond that of an individual reactive grant or number of individual grants?	<b>Yes</b>
Be affordable within the agreed annual budget (from the Trust alone or in combination with other funders) and, looking forward, leave sufficient budget to meet anticipated pro-active grants for the remainder of the financial year?	<b>Yes</b>
Be made to an organisation(s) that conforms to the Trust's eligibility criteria and has the capacity and expertise to deliver the work?	<b>Yes</b>

<b>PRIORITISATION GUIDANCE</b>	
<b>Evidence</b>	
Is there external and/or internal research and information that supports the need for the proposed grant?	<b>Yes</b>
Is there external and/or internal research and information that indicates the approach proposed in the grant will be successful?	<b>Yes</b>
Is there evidence that indicates the work will be hard to fund from other sources?	<b>N/A</b>
<b>Impact</b>	
Will the grant tackle a root cause(s), or positively influence policy or practice?	<b>Yes</b>
Will the work/approach funded be replicable?	<b>Yes</b>
Does the grant provide an opportunity to strengthen Civil Society in London?	<b>Yes</b>
Is the work sustainable beyond the period of the grant?	<b>N/A</b>
Can the impact of the work be measured through evaluation?	<b>Yes</b>



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<b>Committee</b>	<b>Dated:</b>
<b>City Bridge Trust</b>	27 <sup>th</sup> July 2017
<b>Subject:</b> Strategic Initiative – Rushey Green Time Bank for Lewisham Local (Ref: 14157)	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

## Summary

This report seeks your approval to support the local giving scheme, Lewisham Local, for a further two years, as part of the London's Giving initiative.

## Recommendation

Members are asked to agree a grant of £72,340 over two years (£36,170 x 2). The grant to be received by Rushey Green Time Bank on behalf of the Lewisham Local Collaborative, as part of the London's Giving initiative.

## Main Report

### Background

1. The proposal before you is one of two from Rushey Green Time Bank under consideration today. This proposal from Rushey Green Time Bank is made on behalf of Lewisham Local, a collaboration of community, voluntary, business and public sector organisations. Rushey Green Time Bank is a key partner of the Lewisham Local Collaborative, with a strong track record of community development and for spearheading the collaborative's first initiative, the Lewisham Local Community Contributor Card.
2. Also under consideration is an application made under the *Improving London's Environment* strand of your Investing in Londoners programme. Although usually only one grant can be awarded to an organisation at one time, your policies allow you to consider a further application where the applicant is part of a consortium, as is the case with the Lewisham Local Collaborative.
3. Lewisham Local is a place-based giving initiative promoting an asset-based approach that maximises participation and the long-term contribution from all communities within Lewisham. It aims to inspire local people, businesses and organisations to give more towards the needs of Lewisham's communities, encouraging a stronger sense of 'place' for those who live, work, visit and study in the borough and to make the borough fairer and more inclusive.

4. In July 2016, you approved a grant of £24,500 over 9 months to employ a Development Lead to develop Lewisham Local's strategy with key partners from local business, the public sector and the community. The request before you is for funding for a further two years.
5. In March 2017, you approved a grant of £300,000 over three years to enable London Funders to continue to develop London's Giving across London and during the past year, Lewisham Local has worked closely with the London's Giving network.

### **Progress to date**

6. The Lewisham Local collaborative originally comprised Voluntary Action Lewisham, Rushey Green Timebank, Lewisham Council, Lewisham Education Arts Network and Lewisham Volunteer Centre. During the past year, the composition has been widened to include representatives from different faith groups and the local Business in the Community business connector. Members of the collaborative have met on a monthly basis to provide strategic direction for the initiative as well as contributing hot desk space, IT, mobile phone and matrix management.
7. Lewisham Local began with the launch of the 'Community Contributor Card' and the tag line *Give Local, Shop Local*. Managed by Rushey Green Time Bank, the card offers discounts and benefits amongst local businesses and shops and is offered to individuals who have contributed more than 20 hours of skills and time in a calendar year. The number of card holders has quadrupled since its launch and they now number 2,200. The number of businesses supporting the card has doubled to 150 and the number of community groups has grown to 140. Lewisham Local is currently in discussion with the Mayor of London's *Team London* regarding the card's potential as a volunteering incentive.
8. The Lewisham Local card, combined with online marketing and increased giving opportunities has enabled the Lewisham Local brand to gain increased recognition during the past year.
9. During the past year, two areas were identified to trial approaches to create stronger links between community assets and giving assets. New Cross, in the north of the borough, is in part characterised by income deprivation and health inequalities that make it within the most 20% deprived in the UK. On the other hand, however, it has a local University and an active and growing community; giving assets; a transient and younger population; and large scale development and regeneration. By contrast, Downham in the south of the borough, is also amongst the most 20% deprived in the UK but it is characterised by an established and static population; poor transport links; fewer community and giving assets; and stagnant socio-economic statistics. Different approaches were taken in the two areas; a hands-on, frontline approach working with fewer assets in Downham and an enabling approach linking assets in New Cross. Mapping community and giving assets built strong links and encouraged a flexible approach to attract more giving. This



included cross-sector initiatives, such as Go-ON Lewisham Digital Inclusion project.

10. During the year, Lewisham Local also took part in three national campaigns that Lewisham had not participated in before:
  - a) #Giving Tuesday Lewisham took place in November 2016 following the huge retail sales on Black Friday and Cyber Monday. The campaign offered an alternative to the shopping frenzy by encouraging people to get involved in good causes. Examples of activities that were generated through the campaign included a local play association baking cakes and distributing them to isolated older people living on the nearby estate, with student artists, in turn, creating a mural to brighten up the playground. Sainsbury's donated baking ingredients; Halfords and Brewers donated paint; a local carpentry business donated wood; whilst a local HR consultancy donated staff-time to provide interview training and CV advice.
  - b) Lewisham Local participated in Student Volunteering Week in partnership with Goldsmiths College, University of London and Kingston Student Hub and linked 35 Lewisham-based students with a variety of local volunteering opportunities.
  - c) More than 45 people took part in the Downham and Whitefoot GB Spring Clean to clear a walkway as part of the national #GB SpringClean initiative. A range of partners made contributions including Phoenix Community Housing, two local mosques, a local church, Metropolitan Police, Good Gym Lewisham and Lewisham Council.
  
11. In summary, the following has been achieved:
  - 100+ volunteers across three giving events; the majority of which were new to volunteering
  - 11 business donations towards the giving opportunities and individual projects
  - 100% growth of businesses signed up for Lewisham Local Card in one year
  - Established strong working links with two of Lewisham's largest employers – Lewisham Council and Goldsmiths, University of London
  - Linking one-off business & individual contributions to giving opportunities
  - Sharing our asset based approach and work with businesses at local and regional events (e.g. London Funders' London's Giving Masterclass).

## Future Plans

12. Lewisham Local proposes to build on the achievements of the past year by involving more collaborators and by increasing the Development Lead's hours to full-time. It plans to undertake the following activity over the next two years:
  - a) **Promoting employee volunteering:** The three largest employers in the borough Lewisham Council (c2,500 employees); Lewisham Hospital (c2,500 employees); and University of London (c900 employees). In the last year, Lewisham Local has begun discussions with Lewisham Council and Goldsmiths University to promote employee volunteering. Initial responses have been encouraging and Lewisham Local wishes to translate these discussions into positive action. It aims that at least two of Lewisham's largest employers will sign up to an employee volunteering

programme, with a minimum of 5% of employees volunteering on at least one occasion over a two year period.

- b) **Increasing the use and influence of the Lewisham Local Card:** The next phase of work will improve current processes and procedures making the card as accessible and admin-light as possible. Lewisham Local wish to build stronger, regular communication with card holders and businesses linking them to the wider Lewisham Local opportunities. The initiative is funded by LB Lewisham until March 2019 and from July 2017 one day per week of staff time will be allocated by Rushey Green Timebank to engage the Lewisham Local Development Lead.
- c) **Establish a Community Toilet Scheme:** Lewisham Local has identified the need for a Community Toilet Scheme, related to perceived need for increased, good quality and accessible facilities by all residents and in particular those who are ageing, have long-term conditions, vulnerabilities and parents with young children. A community toilet scheme should also help provide cleaner streets and improved public health through reduced urination in streets. The scheme will involve building relationships with local businesses (e.g. shops, restaurants, pubs, coffee shops), community organisations and public facilities (e.g. libraries, adult education centres, and leisure facilities) encouraging them to open their toilet facilities to members of the public, as an active contribution to Lewisham life. Lewisham Local has secured £43,000 from Lewisham Council from July 2017 to provide the scheme. Funding will be held and the scheme will be managed through a core Collaborative member, Rushey Green Time Bank, which has a proven track record in developing links with business and community organisations, and establishing cross-sector co-operation.
- d) **Improved Communications and Profiling of the Lewisham Local brand:** Lewisham Local will increase its online presence by developing a website and further engaging social media to profile and promote local giving. Lewisham Local will work alongside voluntary/community infrastructure organisations through the Collaborative to coordinate sectors' proactive marketing. The aim is to harness engagement, provide opportunities to enable and inspire individuals, and organisations to give more, and to devise asset-based initiatives to normalise the idea of contributing for a thriving Lewisham. Furthermore, there are many new homes being built in Lewisham; new residents are moving into the borough while working outside Lewisham. Working in collaboration with housing providers and developers, it will seek to grow a compelling narrative to reach new residents, to help them to connect to the Lewisham community, to build their sense of place and inspire them to get involved where they live.
- e) **Lewisham Civic Awards:** Lewisham Local is working with the Mayor of Lewisham to establish a community awards scheme and honour local volunteers, organisations and businesses that contribute locally and this is due to launch during 2017.
- f) **Financial Giving:** Lewisham Local will promote financial giving to local charities, voluntary and community sector groups. This will include exploring and utilising different models of financial giving including live crowdfunding events and online crowdfunding platforms. Lewisham Local

is also keen to explore options for setting up its own Lewisham Local Fund, although this will be a long term commitment.

- g) **Sharing Learning and Building Knowledge:** Lewisham Local is highly committed to sharing its learning with others. Lots of positive community action is happening already within the borough e.g. community clean up days, street festivals, community fund-raising. Lewisham Local will work to record good examples and share learning so initiatives that engage and involve local people, businesses and communities and make a positive difference can be replicated elsewhere, thereby contributing to the wider aims of the London's Giving network.

### Lewisham Local Budget

13. Lewisham Local is requesting £72,352 to help continue and extend the initiative for 2 years. The grant recommended has been rounded to £72,340 and would fund salary costs equivalent to 3 days of a full time Development Lead position and make a contribution towards running costs. The grant will be match funded for 2 days a week for salary and running costs. Year 1 match funding has been secured through contributions from Lewisham Council and Rushey Green Time Bank; year 2 match has been largely secured. In-kind contributions from the collaborative are detailed below.

<b>Expenditure</b>	<b>Year 1 (£)</b>	<b>Year 2 (£)</b>	<b>Total (£)</b>
Salary + on costs	52,257	52,257	104,514
Website	2,125	1,125	3,250
Events	2,500	2,500	5,000
Marketing	7,738	1,100	8,838
Travel	1,000	500	1,500
IT/telephony	2,000	2,000	4,000
Professional support	4,000	4,000	8,000
Premises/hot desking	1,592	1,592	3,184
Community toilets	24,948	0	24,948
<b>Total</b>	<b>98,160</b>	<b>65,074</b>	<b>163,234</b>

Income	Year 1 (£)	Year 2 (£)	Total (£)
Lewisham Council - Community Toilets	43,000	0	43,000
Rushey Green Time Bank	9,916	9,916	19,832
Collaborative In-Kind Support	9,442	8,692	18,134
City Bridge Trust	36,176	36,176	72,352
Unsecured Year 2 Income	0	9,916	9,916
<b>Total</b>	<b>98,159</b>	<b>65,075</b>	<b>163,234</b>
Collaborative In-Kind Support	Year 1	Year 2	Total
Premises/hot desking	1,592	1,592	3,184
IT/telephony	2,000	2,000	4,000
Professional Support	4,000	4,000	8,000
Publicity & events	500	500	1,000
Initial website set-up + hosting	750	0	750
Social media volunteer	600	600	1,200
Total	9,442	8,692	18,134

## Finance

14. RGTB operate with financial prudence; have low unrestricted operating costs due to ethos of volunteering and a trusted supplier relationship with the Local Authority.

Year end as at 31st March		FY 15/16 Examined Accounts £	FY 16/17 Draft Accounts £	FY 17/18 Forecast £
<b>Income &amp; expenditure:</b>				
Income		143,090	144,096	142,980
- % of Income confirmed @31/5/17	a	n/a	n/a	93%
Expenditure		(134,276)	(138,526)	(160,928)
Total surplus/(deficit)	b	<b>8,814</b>	<b>5,570</b>	<b>(17,948)</b>
Split between:				
- Restricted surplus/(deficit)		2,501	2,267	(21,363)
- Unrestricted surplus/(deficit)	c	<b>6,313</b>	<b>3,303</b>	<b>3,415</b>
		<b>8,814</b>	<b>5,570</b>	<b>(17,948)</b>
Cost of Raising Funds	d	0	820	1,000
- % of income	e	0.0%	0.6%	0.7%
Operating expenditure (unrestricted funds)	f	1,758	10,506	11,775
<b>Free unrestricted reserves:</b>				
Free unrestricted reserves held at year end	g	19,360	22,663	26,078
No of months of operating expenditure	h	132.2	25.9	26.6
Reserves policy target	i	67,138	69,263	80,464
No of months of operating expenditure	j	458.3	79.1	82.0
Free reserves over/(under) target	k	(47,778)	(46,600)	(54,386)

## **Conclusion**

15. Much has been achieved by Lewisham Local in a relatively short period of time. It has established the Lewisham Local Brand locally and is a valued member of the London's Giving network. Funding for a further two years will enable it to build on what it has achieved so far, and take the initiative to the next level.

### **Jenny Field**

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## Summary Assessment of Strategic Initiative for Committee Decision

<b>FILTERS</b>	
<b><i>Will The pro-active grant:</i></b>	
Further the Trust's Vision and Mission (a fairer London & tackling disadvantage)?	<b>Y</b>
Support work within one of existing Investing in Londoners programmes (IiL)?	<b>N</b>
Or, meet a clear need that has arisen since (IiL) were agreed?	<b>Y</b>
Have the potential for impact beyond that of an individual reactive grant or number of individual grants?	<b>Y</b>
Be affordable within the agreed annual budget (from the Trust alone or in combination with other funders) and, looking forward, leave sufficient budget to meet anticipated pro-active grants for the remainder of the financial year?	<b>Y</b>
Be made to an organisation(s) that conforms to the Trust's eligibility criteria and has the capacity and expertise to deliver the work?	<b>Y</b>

<b>PRIORITISATION GUIDANCE</b>	
<b>Evidence</b>	
Is there external and/or internal research and information that supports the need for the proposed grant?	<b>Y</b>
Is there external and/or internal research and information that indicates the approach proposed in the grant will be successful?	<b>Y</b>
Is there evidence that indicates the work will be hard to fund from other sources?	<b>Y</b>
<b>Impact</b>	
Will the grant tackle a root cause(s), or positively influence policy or practice?	<b>Y</b>
Will the work/approach funded be replicable?	<b>Y</b>
Does the grant provide an opportunity to strengthen Civil Society in London?	<b>Y</b>
Is the work sustainable beyond the period of the grant?	<b>Potentially</b>
Can the impact of the work be measured through evaluation?	<b>Y</b>

MEETING 27/07/2017

Ref: 13863

## ASSESSMENT CATEGORY - English for Speakers of Other Languages

All Hallows Bow

Adv: Sandra Jones

Base: Tower Hamlets

Benefit: Tower Hamlets

Amount requested: £89,195

(Revised request : £147,230}

Amount recommended: £146,400

### The Charity

All Hallows Bow (AHB), based in Bromley by Bow, have a track record of working within the community to meet local needs. Many of the activities supported operate from Fern Street Settlement, and are managed by a Joint Steering Group comprising AHB and Fern Street Settlement trustees. Activities include ESOL, family learning and play, after school and holiday clubs, youth mentoring and groups, and a range of activities and events to build community cohesion.

### The Application

The application is to support the delivery of ESOL classes at the Fern Street Settlement. The original bid was for two years, but after discussions with your officer this was changed to three years (a revised budget is appended to the application form). Using a range of teaching methods, the project will provide ESOL for 70+ adults per annum. This will be provided by a project manager, tutor, volunteers, crèche and associated running costs. Fern Street Settlement will continue to support the project in year 1 by covering the rent element, which makes the revised bid seem proportionally higher than the two year project as it covers the latter two years including the rent.

### The Recommendation

Over the last two years the Project Manager has been funded through the Fern Street Settlement reserves to pilot ESOL support. This has proved to be successful with demand outstripping supply, hence the need to consolidate the work. This project will provide an important service, with adults and children developing their English language skills so that they can take a fuller part in the wider community and their children's lives. Funding will cover the Project Manager/Tutor (2 days per week), ESOL teacher (2.5 days per week) business support (.5 days per week) and associated running costs. The amount is slightly below the revised request as the inflation on year 3 was higher than for year 2.

***£146,400 over 3 years (£41,600; £51,600; £53,200) towards the salary costs of the Project Manager /Tutor (2 days per week); ESOL teacher (2.5 days per week); business support (0.5 days per week); and associated running costs.***

### Funding History

None

### Background and detail of proposal

The charity estimates that many of the intended participants are Bangladeshi/ Asian but also include others (Somali, Eastern European, Spanish) with 90% being women with dependent children.

Learning will include work in the classroom, conversation classes within a 'café' setting at the centre, family learning for parents and their children under 5 years, cook and talk sessions. All are aimed at using different settings to advance the participants language skills. A crèche will be available to enable the parents to concentrate on the learning. The project will be working with local partners, including a local Health Centre where conversation sessions around health will be held to assist participants to understand language around health issues. Classes will enable the participants to be able to engage more fully with the wider community and enable them to access local services more easily.

### Financial Information

Major sources of funding are through grants and donations, of which the majority has been confirmed for 2017.

In the 2016 examined accounts the cost of raising funds was not included. Your officer discussed this with the charity and they identified that the cost of raising funds is the cost of a fundraiser who supports the steering committee in applying for funds. This figure is low as much of the income is through regular donations.

Unrestricted funds are within a reasonable margin of the charity's reserves policy.

Year end as at December	2016 Examined Accounts £	2017 Forecast £	2018 Forecast £
<b>Income &amp; expenditure:</b>			
Income	268,099	315,299	328,781
- % of Income confirmed 29/06/17	n/a	80.40%	0.00%
Expenditure	(271,380)	(312,249)	(322,385)
Total surplus/(deficit)	<b>(3,281)</b>	<b>3,050</b>	<b>6,396</b>
Split between:			
- Restricted surplus/(deficit)	12,829	2,966	271
- Unrestricted surplus/(deficit)	(16,110)	84	6,125
	<b>(3,281)</b>	<b>3,050</b>	<b>6,396</b>
Cost of Raising Funds	0	3,650	3,650
- % of income	0.0%	1.2%	1.1%
Operating expenditure (unrestricted funds)	140,998	146,093	141,320
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	80,658	80,742	86,867
No of months of operating expenditure	6.9	6.6	7.4
Reserves policy target	70,499	73,047	70,660
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	10,159	7,696	16,207



MEETING: 27/07/2017

Ref: 14017

## ASSESSMENT CATEGORY - English for Speakers of Other Languages

Islington Centre for Refugees and Migrants

Adv: Sandra Jones

Base: Islington

Amount requested: £75,000

Benefit: London-wide

Amount recommended: £50,400

### The Charity

Islington Centre for Refugees and Migrants (ICRM) was established in 1997 and aims to support the refugee and asylum-seeking community in London through reducing poverty and suffering and by advancing education. Operating for 3 days per week the organisation offers ESOL pre-accreditation, advice and advocacy and wellbeing activities to enable participants to cope with physical and psychological issues.

### The Application

This application is to support the delivery of ESOL classes, run in a range of settings, over three years and focussing on those people attending the centre that are destitute. Funding requested is towards two ESOL Tutors (15 hours per week X2), Centre Director, Fundraising and Development Officer and Support Services Co-ordinator (all for approx. 0.75 days per week), direct delivery costs and core costs.

### The Recommendation

ICRM has an excellent track record of delivering quality ESOL, working with those highest in need. The project will benefit 70 people per annum, many of whom will be attending for more than one year. As well as providing ESOL in a classroom setting, they also use other settings to ensure language acquisition, which is taking into account the individual's learning styles. The request comprises the direct costs of the project of £14,000 per annum covering the ESOL staff, associated running costs, travel costs for the participants and volunteer costs. £11,000 per annum is towards core costs including the other salaries and centre running costs. Your officer advises that core costs be reduced to 20% of the direct project costs (£2,800 per annum) – hence the recommendation:

***£50,400 over three years (3 x £16,800) for the costs of 2 p/t (15hpw) ESOL Tutors; associated project costs; and a maximum of £2,800 pa towards core costs.***

### Funding History

Meeting Date	Decision
13/05/2015	Declined as the request appeared to directly replace reductions in funding from Waltham Forest College.
27/09/2012	Declined as proposal fell outside the funding criteria.

### Background and detail of proposal

During 2015/16 the Centre reduced activities to 1 day per week whilst seeking new funding, and has managed to increase this to 3 days per week. Of the 150+ people ICRM work with per year, 60% experience destitution, and so the charity offers a 'wraparound' service. Lack of English is a key barrier to services and living in the UK, and people find it difficult to begin to build the social networks and support to

establish new lives. The ESOL support offered is at two levels; beginners with no knowledge of English and more advanced at level 1. Focussing of 70 destitute asylum seekers, refugees and migrants, the charity will provide a comprehensive ESOL programme which includes classroom sessions, as well as learning in different settings. This includes a choir where participants are supported to write their own lyrics in English, learning to use the language to express complex concepts, for example memories of home and hopes for their time in the UK. This method of learning has come out of an understanding that people have different learning styles.

### Financial Information

Forecast income for 2017/18 covers individual and partner donations which increased in 2016/17 and a further increase is anticipated for 2017/18 due to a Board member who is a corporate fundraiser. In 2015/16 the charity experienced major funding reductions as funding for ESOL from Waltham Forest FE College was cut. In that year all services were run from unrestricted funding at a loss, leaving just under 3 months free reserves at year end. Restricted funding has been secured for a significant proportion of ICRMs services, including new projects. This restricted funding is from charitable trusts and foundations.

ICRM's free reserves were depleted during this period, but this is being rectified through concerted fundraising efforts. Cost of Raising funds is calculated at two thirds of the Fundraising and Development Officer's salary. The figure is relatively low as a member of the Board undertakes a major proportion of the fundraising.

<b>AUGUST</b>	<b>2015/2016 Examined Accounts £</b>	<b>2016/2017 Forecast £</b>	<b>2017/2018 Forecast £</b>
<b>Income &amp; expenditure:</b>			
Income	100,863	207,406	185,590
- % of Income confirmed as at 26/06/17	n/a	n/a	39%
Expenditure	(154,114)	(151,825)	(152,118)
Total surplus/(deficit)	<b>(53,251)</b>	<b>55,581</b>	<b>33,472</b>
Split between:			
- Restricted surplus/(deficit)	0	15,011	(50)
- Unrestricted surplus/(deficit)	(53,251)	40,570	33,522
	<b>(53,251)</b>	<b>55,581</b>	<b>33,472</b>
Cost of Raising Funds	11,450	7,500	11,250
- % of income	11.4%	3.6%	6.1%
Operating expenditure (unrestricted funds)	154,114	77,489	24,978
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	34,628	75,198	108,720
No of months of operating expenditure	2.7	11.6	52.2
Reserves policy target	38,529	19,372	6,245
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(3,901)	55,826	102,476

**MEETING: 27/07/2017**

**Ref: 14004**

## **ASSESSMENT CATEGORY - Improving London's Environment**

**Rushey Green Time Bank (RGTB)**

**Adv: Kate Moralee**

**Amount requested: £111,663**

**Base: Lewisham**

**Benefit: Lewisham**

**Amount recommended: £113,000**

### **The Charity**

The Rushey Green Time Bank improves the wellbeing of individuals by enabling the local community to provide care and services for each other through a variety of activities that involve using people's skills and talents. As people start to help and get to know their neighbours, they rebuild a sense of trust and community belonging. Their aim is to help build a cohesive community where neighbours get to know and can rely on each other for help and support, and where people of different ages, cultures, backgrounds and abilities interact and bridge divides. RGTB is well networked across the borough, has an excellent relationship with the Local Authority and attends a variety of forums, Boards and Consortium.

### **The Application**

City Bridge Trust is asked to support the development of the Wild Cat Wilderness community green space in Catford. This includes a part time project co-ordinator and part time assistant, a new polytunnel, outdoor kitchen shelter and other direct project costs. The staff will work with the local community, run regular activities and events, encourage volunteering, develop the community food growing space and run more cooking and preserving workshops to enhance the understanding of healthy, nutritious food for families.

### **The Recommendation**

The organisation is the oldest surviving Time Bank, set up in the 1990's and has an excellent reputation locally, regionally and nationally. It implements its ethos of placing the community at its heart by developing projects in partnership with and driven by volunteers. RGTB secured the Wilderness Site in 2004 (it is owned by Leathersellers and managed by Colfe's School) and has a lease until 2022. It has recently been offered more land to explore and develop. This project was previously funded by People's Health Trust, funding ended September 2016, and through reserves since then, which has meant a reduction in the number of activities. The amount recommended is slightly higher than the original sum requested to rectify small budget mistakes noted during the assessment process.

Also under consideration today is a Strategic Initiative proposal from RGTB on behalf of The Lewisham Local Collaborative. Although usually only one grant can be awarded to an organisation at one time your policies allow you to consider a further application where the applicant is part of a consortium as is the case with the LLC.

**£113,000 over three years (£41,000; £35,000; £37,000) for the salary of a Co-ordinator (p/t 16 hrs per week) and Assistant (p/t 8 hrs per week) and associated direct costs of the Wild Cat Wilderness project.**

### **Funding History**

Meeting Date	Decision
05/04/2007	£73,200 over 3 years (£24,100; £24,200; £24,900) for the salary and project costs of engaging older people in time banking.

## Background and detail of proposal

This proposal has been informed by learning from the delivery of the project since 2014. The site was originally an unloved rubbish strewn wilderness and has been cleared and developed with and by volunteers from the local community. The area is regularly used by the local community, schools, uniformed groups and children on the autistic spectrum, with one family using the “family days” as their only outing together. This project sits within a comprehensive portfolio of services and activities which complement each other and create cross fertilisation of volunteers.

Gardening and nature conservation is led by a Horticulturist Therapist and is used to promote health and wellbeing, with a core focus on food and healthy eating, sharing food, cooking on the campfire and sharing recipes. It is acknowledged that food is central to everyone’s lives and brings people together, breaking down barriers. This project complements the FoodCycle project and vice versa, with FoodCycle sessions held at the Wild Cat Wilderness encouraging individuals from each project to attend the other – cross fertilisation in action.

The Wild Cat Wilderness provides a safe space for children to experience nature; I witnessed 60 local young people using the site to develop their volunteering skills whilst on the visit. This proposal builds on previous work delivered by increasing the staffing resource, employing and training an assistant for 8 hours per week (a local person). The proposal will also increase food growing, cooking, sharing and learning opportunities.

## Financial Information

RGTB operates with financial prudence; have low unrestricted operating costs due to ethos of volunteering and have a trusted supplier relationship with the LA.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	143,090	144,096	142,980
- % of Income confirmed @31/5/17	n/a	n/a	93%
Expenditure	(134,276)	(138,526)	(160,928)
Total surplus/(deficit)	<b>8,814</b>	<b>5,570</b>	<b>(17,948)</b>
Split between:			
- Restricted surplus/(deficit)	2,501	2,267	(21,363)
- Unrestricted surplus/(deficit)	6,313	3,303	3,415
	<b>8,814</b>	<b>5,570</b>	<b>(17,948)</b>
Cost of Raising Funds	0	820	1,000
- % of income	0.0%	0.6%	0.7%
Operating expenditure (unrestricted funds)	1,758	10,506	11,775
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	19,360	22,663	26,078
No of months of operating expenditure	132.2	25.9	26.6
Reserves policy target	67,138	69,263	80,464
No of months of operating expenditure	458.3	79.1	82.0
Free reserves over/(under) target	(47,778)	(46,600)	(54,386)

MEETING: 27/07/2017

Ref: 13753

## ASSESSMENT CATEGORY - Making London More Inclusive

**Disability Sports Coach**

**Adv: Jack Joslin**

**Base: Southwark**

**Amount requested: £139,744**

**Benefit: Multi-Borough**

**Amount recommended: £139,800**

### **The Charity**

Disability Sports Coach (DSC) was founded by CEO Peter Ackred in 2005 as a limited company with an ambition to create more opportunities for Disabled people to enjoy sport and physical activity. In January 2013 DSC became a registered charity with the aim of expanding their work in order to maximise the access and provision of Disability Sport across the UK. The charities work is mainly focused in London, developing local community sports clubs in partnership with leisure centres and sporting facilities. In 2014 the charity received support from Sport England to develop its community club model expanding their provision to 11 venues across London. Since 2013 the club programme has supported over 300 disabled people to attend club sessions with over 9000 disabled people being engaged through their outreach programme.

### **The Application**

DSC is looking for your support to ensure that five of their existing community clubs can continue to operate over the next three years, allowing more disabled people to actively take part in sport. The community clubs will operate in sports centres within five London Boroughs: Hackney, Hillingdon, Lambeth, Tower Hamlets and Islington. The clubs will run 36 weeks a year offering multi-sports opportunities. In order to sustain the five community clubs DSC are looking for your support towards a part time Club Development Officer, two sessional coaches, a contribution to facility hire and associated running costs.

### **The Recommendation**

DSC has a good track record of delivering sports opportunities for Disabled people across London. Your funding will help to sustain five of the established community clubs in five London Boroughs ensuring opportunities are available for Disabled people to actively take part in sport. This application fits well with your priority for Making London more Inclusive and funding is recommended as follows:

**£139,800 over 3 years (£46,100; £46,600; £47,100) for the Club Development Officer (18.75hpw), sessional Sport Coaches, Facility Hire and associated running costs of 5 Disability Sport Clubs across London.**

### **Funding History**

None

### **Background and detail of proposal**

DSC has been successfully delivering 11 Community Clubs across London with support from Sport England over the last three years and has recently received a one year extension on this grant to expand this work. DSC is now looking to the future and how they can sustain and expand the community clubs when their Sport England funding comes to an end. This application is looking to sustain support for

five of their established clubs, replacing the Sports England funding for these clubs, to ensure they can continue to provide multi-sport opportunities for disabled people in London.

The club sessions will run in 12 week blocks offering two hour weekly session in Hackney, Hillingdon, Lambeth, Tower Hamlets and Islington. Each club will offer a wide range of sports delivered by two qualified coaching staff which includes: tennis, basketball, football, athletics and Paralympic Sports including Boccia, Goalball and Sitting Volleyball. Club sessions will be promoted among voluntary sector organisations, at SEN schools and through local authority disability teams who DSC has already established links with. DSC has a strong partnership with Greenwich Leisure Limited who will provide the five venues for this project at a reduced rate. DSC has a number of Paralympic Athletes as Patrons who attend sessions from time to time.

### Financial Information

The organisation has re-structured its staffing structure and is currently recruiting a fundraising manager who will be tasked with targeting more trust and grant funding while diversifying the organisations income streams. The Charity is already projected to build their unrestricted reserves by developing their contract income from Local Authorities and expanding their partnership working with Greenwich Leisure Limited. Increase in contract income while being awarded a further year funding from Sports England has led to an increase in the organisation's turnover. At assessment your officer was re-assured that the new staffing structure could support this increase in the charity's capacity.

Year end as at 30 April	2015/ 16	2016/ 17	2017/18
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	278,792	247,602	512,325
- % of Income confirmed as at June 2017	n/a	n/a	63%
Expenditure	(280,185)	(236,113)	(447,398)
Total surplus/(deficit)	<b>(1,393)</b>	<b>11,489</b>	<b>64,927</b>
Split between:			
- Restricted surplus/(deficit)	(1,165)	(12,121)	2,968
- Unrestricted surplus/(deficit)	(228)	23,610	61,959
	<b>(1,393)</b>	<b>11,489</b>	<b>64,927</b>
Cost of Raising Funds	42,159	18,099	78,680
- % of income	15.1%	7.3%	15.4%
Operating expenditure (unrestricted funds)	45,874	67,121	154,851
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	18,472	42,082	104,041
No of months of operating expenditure	4.8	7.5	8.1
Reserves policy target	15,291	22,374	51,617
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	3,181	19,708	52,424

**MEETING: 27/07/2017**

**Ref: 13972**

**ASSESSMENT CATEGORY - Making London More Inclusive**

**Park Theatre**

**Adv: Julia Mirkin**

**Amount requested: £82,074**

**Base: Islington**

**Benefit: Islington**

**Amount recommended: £68,650**

**The Charity**

The Park Theatre (PT) opened in May 2013 and is based near Finsbury Park. It is a purpose-built venue with two performance spaces, one with 200 seats and the other accommodating an audience of 90. PT presents 25 productions per year, attracting approximately 100,000 visitors - including café users and attendees of PT's learning programme, comprising a reminiscence group for older local people; an adult ensemble group; youth and children's activities and work in local schools. The learning programme, along with PT's subsidised ticket offer, demonstrates PT's commitment to embedding itself in its community and making its work accessible. This proposal aims to build on this commitment through targeted programming for disabled audiences and an upgrade to PT's facilities.

PT describes itself as 'a neighbourhood theatre with a global ambition'. The launch of the venue's first accessible season in 2017 is an important and central means of realising this aim. Addressing accessibility through programming and complementary capital development, therefore, is consistent with the organisation's wider aims and strategy.

**The Application:** The delivery of a three-year access performance/participation programme with training to integrate access throughout the organisation.

**The Recommendation**

The application includes the costs of Parent and Baby friendly performances, which falls outside of your Making London More Inclusive criteria. The budget also included a contribution to subsidised tickets, which is beyond the specific focus of your funding. To replace this line, your officer recommends including a 10% contribution to core costs, which is included in the recommended amount below.

**£68,650 over three years (£29,250; £21,900; £17,500) for the delivery of accessible performances for disabled audiences; access training; the installation of evacuation chairs; website adaptations and a 10% contribution to core costs.**

**Funding History**

Meeting Date	Decision
25/09/2014	£2,000 to match CEP funding towards the wage costs of 1 Apprentice for 1 year. The national minimum wage must be paid.

**Background and detail of proposal**

PT proposes to develop a programme for audience members who are deaf, visually impaired, on the autistic spectrum or who have conditions that make them anxious in a theatre environment. In May 2016, 10,640 people in Islington were claiming Disability Living Allowance (Islington Council's 2016 annual report). Being on the border of Haringey and Hackney further increases PT's potential catchment for disabled people. To accommodate the accessibility needs of the local population, PT proposes to programme captioned, audio described and 'relaxed and Dementia

Friendly' performances. This involves consulting with visiting theatre companies about modifications to make their productions more accessible, for example, by providing written pre-show notes or making the lighting and sound less extreme. Specialist captioning or audio description equipment will be hired for the season and specialist technicians from Vocaleyeyes (the leading agency for accessibility in the arts and heritage sector) will be hired to support and train PT staff in its use. Audio description scripts will be compiled and 'touch tours' will be planned and scheduled for blind audience members before shows; specialist captioning and audio description training alongside general safeguarding and awareness-raising training will be delivered for staff working throughout the building. The costs associated with implementing accessible performances, such as those outlined above, make up the majority of the request; in addition, PT proposes to employ a part-time Manager to oversee this work and requests that costs for staff training and accessible website adaptations are covered by any potential grant. The proposal also includes a contribution to the costs of installing evacuation chairs around the building to ensure an increasing disabled audience can be accommodated safely and comfortably.

### Financial Information

Income and expenditure relating to the café-bar is included in the total figures presented. Income of £465,463 was generated by the café-bar during 15-16 (34% of turnover) and a net profit of £16,436. Therefore, the charity includes the costs of running the café-bar in the cost of raising funds. After deducting income from the café-bar, PT's income was £888,860 in 15-16.

The 16-17 forecast income is lower than that achieved in 15-16 due to that raised at a gala dinner celebrating the theatre's 2<sup>nd</sup> birthday. Similarly, income in 17-18 is budgeted to increase due to fundraising activity with Sir Ian McKellen, which is anticipated to raise approximately 60% of budgeted income for the year. The low level of secured income for 17-18 is attributed to the fundraising to support this, which is scheduled to take place the week commencing 03/07/17.

PT has also been encouraged to submit a Grants for The Arts application by Arts Council England, which it intends to do this financial year.

Year end as at December	2015-16 Examined £	2016-17 Forecast £	2017-18 Forecast £
<b>Income &amp; expenditure:</b>			
Income	1,354,323	1,196,704	1,428,900
- % of Income confirmed as at 29/06/17	n/a	n/a	9%
Expenditure	(1,429,023)	(1,170,286)	(1,332,102)
Total surplus/(deficit)	<b>(74,700)</b>	<b>26,418</b>	<b>96,798</b>
Split between:			
- Restricted surplus/(deficit)	(6,385)	-	64,957
- Unrestricted surplus/(deficit)	(68,315)	26,418	31,841
	<b>(74,700)</b>	<b>26,418</b>	<b>96,798</b>
Cost of Raising Funds	449,027	441,121	476,243
- % of income	33.2%	36.9%	33.3%
Operating expenditure (unrestricted funds excl Café spend)	950,613	708,829	897,102
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	120,070	146,488	243,286
No of months of operating expenditure	1.5	2.5	3.3
Reserves policy target	200,000	200,000	200,000
No of months of operating expenditure	2.5	3.4	2.7
Free reserves over/(under) target	(79,930)	(53,512)	43,286



MEETING: 27/07/2017

Ref: 13860

## ASSESSMENT CATEGORY - Making London Safer

**Stay Safe East**

**Adv: Shegufta Rahman**

**Base: Waltham Forest**

**Amount requested: £103,690**

**Benefit: Waltham Forest & Newham**

**Amount recommended: £103,700**

### **The Charity**

Stay Safe East (SSE) is a user-led organisation of disabled people. Registered as an independent charity in 2013, its services date back to 2010 when it operated as part of a larger disabled people's organisation. The charity works for change at a London and national level to address inequalities in response from mainstream support agencies to disabled victims of violence.

### **The Application**

SSE has identified the need to increase and improve its support for Deaf and disabled people. In its three years of operating as a charity (and six years as a service), it has recorded an increase in the number of complex cases involving child protection, domestic violence, or women with high support needs (including mental health, cognitive issues due to stroke or brain injury, learning disabilities, aphasia etc). In the past year SSE has had to turn down 14 domestic violence referrals and was unable to take referrals from the local Multi-Agency Risk Assessment Conferences (MARACs) for 12 weeks due to limited capacity.

### **The Recommendation**

SSE has evidenced its effectiveness in supporting Deaf and disabled people, and this request for a new Casework Lead and a new database will enable it to manage effectively an increase in caseload, staff and volunteers.

***£103,700 over three years (£35,500, £33,800, £34,400) for a p/t Casework Lead (26h/w), a Case Management System and associated project costs.***

### **Funding History**

None

### **Background and detail of proposal**

Due to SSE's input, Waltham Forest MARAC has the highest percentage of disabled people referred to it of any MARAC in England and Wales (24% v. national average of 5%). With 15% of London's population registered as Deaf or disabled, 32% of all disabled people live in poverty, and this rises for BAME disabled people (44%), against 17% of the UK population as a whole (Scope, 2012). Domestic violence is higher amongst people living in poverty, and lack of access to services has a substantial impact on victims of abuse. Despite pockets of wealth, Waltham Forest and Newham are some of the most deprived areas in England, with higher levels of poverty, unemployment, and long-term limiting illness (London's Poverty Profile).

Disabled people are more likely to experience violence or abuse at some point in their lives than other population groups; disabled children are 3.7 times more likely to be victims of violence against their non-disabled peers, and adults 1.5 times more likely (World Health Organisation, 2012). These statistics are reflected in UK crime

figures, where although violent crime has fallen by 48% for the non-disabled population over the past 10 years, the number of those with a limiting disability or illness who were victims of violence increased by 3.7% (Victim Support, 2016). A higher proportion of disabled women and girls also experience sexual abuse.

The funding will enable SSE to increase numbers in both boroughs, but specifically in Newham with additional capacity and marketing, working intensively with more disabled victims with complex support needs and who need very long-term support without this impacting negatively on other clients. SSE's current monitoring system relies on a mix of manual and electronic systems which are not wholly integrated or accessible to all relevant team members. A new database system with update alerts, tracking, recording and outcome data will improve efficiency and provide an excellent source of client research to support future work. Further, a Casework Lead will enable SSE to take on more volunteers to increase service capacity, whilst also serving an additional need in supporting volunteers (all of whom are Deaf and disabled people) with life skills, confidence building and potential employment skills.

### Financial Information

Cost of Raising Funds was nil in 2015/16 due to the relevant time of the Director and Trustees not being apportioned to this spend. This is now being reported against.

A high proportion of income for SSE comes from statutory sources (61-70%) mainly from MOPAC for a Domestic Violence contract, as well as funding for hate crime work, which was renewed this June for a further three years. The charity has multiple bids pending with other funders for a variety of projects. SSE has also been developing an income stream from training and consultancy work delivered to clients such as the IDVA team in Cambridgeshire and Police Scotland. SSE is the Domestic Violence training expert for Inclusion London. The funding requested will allow the Director to focus on building this unrestricted income stream, which will also help grow SSE's reserves closer to its target.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	82,029	114,949	139,412
- % of Income confirmed as at 12/06/2017	n/a	n/a	83%
Expenditure	(81,504)	(107,150)	(125,412)
Total surplus/(deficit)	<b>525</b>	<b>7,799</b>	<b>14,000</b>
Split between:			
- Restricted surplus/(deficit)	0	(35)	1,885
- Unrestricted surplus/(deficit)	525	7,834	12,115
	<b>525</b>	<b>7,799</b>	<b>14,000</b>
Cost of Raising Funds	0	350	650
- % of income	0.0%	0.3%	0.5%
Operating expenditure (unrestricted funds)	10,304	9,700	24,885
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	3,522	11,356	23,471
No of months of operating expenditure	4.1	14.0	11.3
Reserves policy target	20,376	26,788	31,353
No of months of operating expenditure	23.7	33.1	15.1
Free reserves over/(under) target	(16,854)	(15,432)	(7,882)

**MEETING: 27/07/2017**

**Ref: 13990**

## **ASSESSMENT CATEGORY - Older Londoners**

**Arts 4 Dementia**

**Adv: Geraldine Page**

**Base: Camden**

**Amount requested: £75,000**

**Benefit: Hackney**

**Amount recommended: £75,000**

### **The Charity**

Arts 4 Dementia (A4D) was founded in 2011 by Veronica Franklin Gould MBE to help fill a gap in dementia care; to develop and co-ordinate artistic opportunities to re-energise and inspire people in the early stages of dementia; and to provide quality time for them, their families and carers. After seeing the positive reaction of her mother (who had been diagnosed with Alzheimer's disease) to being played music she started to research artistic stimulation that bypasses dementia symptoms. Today A4D helps to develop activities for people in the early stages of dementia and their carers. It liaises with art organisations, education departments, memory services care teams and other agencies to help set up, facilitate and create projects at arts venues for people living with dementia. Art organisation partners have included The Wallace Collection, Leighton House Museum, the Dulwich picture gallery, Cadogan Hall, Tricycle Theatre (Kilburn), and Putney Library.

### **The Application**

A4D is requesting a contribution towards the core costs of its London Operations over the next 3 years, which in accordance with your policy on funding core costs constitutes the majority of the Charity's work. A4D services include:

- Workshops to simulate and inspire people with dementia to help override stressful symptoms and isolation through artistic engagement, helping them to live longer and better at home;
- Training for arts organisations to develop and deliver innovative arts programmes for people with early stage dementia, typically comprising eight weekly workshops;
- A website that carries the only national listing of arts events for people with dementia (your grant will only contribute to the London portion of the site);
- Early dementia awareness training for arts facilitators.

A4D works with Alzheimer's society, memory services and the NHS to encourage patients towards arts upon diagnosis.

### **The Recommendation**

In the short period of time since it was launched, A4D has forged impressive connections across arts and health sectors. A grant from your Committee would come at a critical time as A4D expands its London operations, and fits well with your priorities for this programme. A4D is a small organisation which punches above its weight and it has been very influential with Arts organisations bringing to their attention solid evidence about the benefits of arts activities for those with early stage Dementia. A4D will need to raise additional funds from elsewhere but a grant as advised would provide some leverage.

***£75,000 over 3 years (£25,000, £25,000, £25,000) towards core costs of A4D's London Arts Programme (LAP) delivering arts workshops to those living with early stage dementia and their Carers.***

## Background and detail of proposal

Every four seconds, someone is diagnosed with dementia. 850,000 people in the UK and about 72,000 in London are living with dementia. A quarter of these are coping with its early stages. (Ref. World Health Organisation / Alzheimer's Society).

Memory loss leads to anxiety, confusion, increasing stress, and isolation – however it is known that people's artistic and imaginative responses can remain strong for years after the onset of dementia. A4D work with arts organisations to facilitate high-quality, re-energising, arts workshops that bypass the stresses of dementia, inspire the interests of families with dementia, restore self-esteem and sense of purpose. A4D's Evaluation in 2012 of 17 Arts 4 Dementia projects covering a range of art forms (including music, photography, drama, painting, poetry and dance) was used to assess the impact of each arts activity on cognitive function and wellbeing for both the person with dementia (PWD) and their carer. It presents good evidence of the effects to participants, such as:

- All PWD now feel less isolated, have groups of friends, are restored to active creative sociable life, keen to return for more workshops;
- 97% of PWD see that engaging in arts activity overrides memory worries and that their creative skills are vibrant;
- 99% of PWD see that continuing arts activity will enrich their lives;
- 94% remained energised, happy and stress-free overnight and 60% for a week or more.

## Financial Information

In the 6 years A4D has been running it has successfully raised funds from grant making trusts and other fundraising to meet its expenditure. Trustees have an ambitious reserves target of 12 months operating expenditure. During 2017/2018 income and expenditure is unusually high due to the 9 month Dorset Programme, a discrete and standalone project funded by the Utleay Foundation. A4D is currently looking at how it allocates funding against restricted expenditure with a view to changing its accounting policy. It has also engaged a professional fundraising consultant to help raise match funding going forward.

Year end as at 31 March	2016	2017	2018
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	89,675	113,070	201,116
- % of Income confirmed as at <b>27/06/2017</b>	n/a	n/a	24%
Expenditure	(83,332)	(109,200)	(197,742)
Total surplus/(deficit)	<b>6,343</b>	<b>3,870</b>	<b>3,374</b>
Split between:			
- Restricted surplus/(deficit)	22,240	6,109	(5,000)
- Unrestricted surplus/(deficit)	(15,897)	(2,239)	8,374
	<b>6,343</b>	<b>3,870</b>	<b>3,374</b>
Cost of Raising Funds	16,269	16,024	31,431
- % of income	18.1%	14.2%	15.6%
Operating expenditure (unrestricted funds)	69,982	67,579	62,961
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	18,312	24,910	33,284
No of months of operating expenditure	3.1	4.4	6.3
Reserves policy target	89,675	113,070	117,000
No of months of operating expenditure	15.4	20.1	22.3
Free reserves over/(under) target	(71,363)	(88,160)	(83,716)

**MEETING: 27/07/2017**

**Ref: 14003**

## **ASSESSMENT CATEGORY - Older Londoners**

**Ashford Place**

**Adv: Joan Millbank**

**Amount requested: £84,914  
(Revised request: £99,914)**

**Base: Brent  
Benefit: Brent**

**Amount recommended: £99,900**

### **The Charity**

Ashford Place (formerly known as Cricklewood Homeless Concern) was set up in 1983 and is a charitable company limited by guarantee. The charity provides a range of support services to assist North Londoners who are vulnerable including those who are homeless, in poor mental health, and unemployed. In the last year 133 homeless people were helped off the streets - into its emergency accommodation / assessment centre, or onto secure accommodation, or reconnected with family and friends. It also uses its building as a neighbourhood community hub offering Brent residents a broad range of learning, cultural, social, health-related and leisure activities. In 2009 the charity set up and continues to run the Cricklewood Town Team, a place-based collaboration between local residents and businesses to make the neighbourhood a pleasant and safe place to live and work.

### **The Application**

The applicant is seeking a three year grant to give it the capacity to address unmet need by developing dementia cafes across Brent. With your support the charity would employ a part-time development worker who will help at least 15 community-based organisations to set up and run self-sustaining, culturally-specific dementia clubs through the provision of practical support, information and training. Running costs are also sought.

### **The Recommendation**

The proposal builds on the charity's own experience in supporting Irish people with dementia. It runs a weekly dementia café which has been assessed as a leading example of community-led peer support for people with dementia and their carers (NHS Brent Clinical Commissioning Group 2017). The charity has been in the forefront of building Community Action on Dementia Brent (CAD-Brent), which aims to make Brent 'dementia friendly' and fully inclusive for people living with dementia and their carers. Its chief officer is chair of CAD-Brent. At the assessment meeting project costs were discussed and given the proposed benefits your grants officer recommended that the applicant seek the full cost of the proposed project so that it did not have to draw on its reserves; hence the revised funding request:

**£99,900 over three years (£33,000; £33,300; £33,600) for the salary of a part-time Dementia Café Co-ordinator (3 days per week), project activity costs and overheads.**

### **Funding History**

Meeting Date	Decision
17/02/2011	£95,000 over three years towards the salary and running costs of a community-based programme to support vulnerable people.
06/09/2007	£80,000 towards the cost of providing disabled access to the new Community Resource Centre.

## Background and detail of proposal

Dementia is a collection of symptoms that result from damage to the brain, and includes memory loss, confusion and changes in personality and mood. People living with dementia become increasingly reliant on carers; often family members who have little awareness or training in dementia care. An estimated 3000 people aged 65 years plus are living with dementia in Brent; with an estimated 67% drawn from Black and Minority Ethnic communities. The project proposal is to set up at least 15 cafés, which will be welcoming and friendly meeting spaces where people with dementia and their carers can go each week to meet others, have fun, and receive culturally appropriate support and specialist information. The 'cafes' will be run from the buildings of partner organisations, and developed in a way to build the partners' skills to maintain the meeting spaces long term. Those expressing interest to date include a local Mosque, Temple and Church. Volunteers will be 'recruited' from within partner organisations, trained in dementia awareness, peer support, community engagement and basic project management. Each café will be supported for up to one year or until it is firmly established. A total of 450 older people with dementia and their carers are expected to benefit through participation in at least 15 community-based weekly meeting spaces.

## Financial Information

While the accounts do not show the cost of generating funds, the charity has confirmed that its CEO spends approximately 15% of his time negotiating contracts and preparing funding bids; time spend is equivalent to approximately £9,300 per annum. In 2017 the charity set up a Fund-raising Sub- Committee to investigate ways of generating more unrestricted income and increasing its free reserves.

Year end as at 31 March	2016	2017	2018
	Audited Accounts	Draft Accounts	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	935,405	786,106	873,970
- % of Income confirmed at 30/05/2017	n/a	n/a	94%
Expenditure	(1,024,675)	(844,530)	(940,241)
Total surplus/(deficit)	<b>(89,270)</b>	<b>(58,424)</b>	<b>(66,271)</b>
Split between:			
- Restricted surplus/(deficit)	49,248	(16,608)	8,951
- Unrestricted surplus/(deficit)	(138,518)	(41,816)	(75,222)
	<b>(89,270)</b>	<b>(58,424)</b>	<b>(66,271)</b>
Cost of Raising Funds	0	0	0
- % of income	0.0%	0.0%	0.0%
Operating expenditure (unrestricted funds)	670,789	324,492	125,222
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	221,215	223,137	147,915
No of months of operating expenditure	4.0	8.3	14.2
Reserves policy target	341,558	282,347	313,414
No of months of operating expenditure	6.1	10.4	30.0
Free reserves over/(under) target	(120,343)	(59,210)	(165,499)

MEETING: 27/07/2017

Ref: 14002

## ASSESSMENT CATEGORY - Older Londoners

**Bexley Crossroads Care Limited**

**Adv: Kate Moralee**

**Base: Bexley**

**Amount requested: £181,363**

**Benefit: Bexley, Lewisham, Greenwich**

**Amount recommended: 155,000**

### The Charity

Bexley Crossroads Care Limited (BCC) is an autonomous registered charity, a network partner of Carers Trust. It aims to improve support, services and recognition to unpaid carers and families across the London boroughs of Bexley, Greenwich and Lewisham by providing practical support, early intervention support, respite services, short breaks and a volunteer befriending service whilst also representing the interests of carers in various arena.

### The Application

City Bridge Trust is asked to support the delivery of support to carers aged over 65 to reduce non-medical and frequent presentations at GP surgeries or A&E, to reduce isolation and to improve health and wellbeing.

### The Recommendation

The organisation has a 27 year track record of providing services to carers across the three boroughs. This project sits well with their current portfolio of community services which include befriending services and three dementia cafes. The role of the link worker will be to liaise with GP practices as well as Older Persons Carers Forums, Age UK, Alzheimer's Society and other community services in the three boroughs. The proposal offers one-to-one surgeries; development of befriending volunteers; and service and delivery of a variety of workshops. Whilst the Charity is currently operating within its charitable objects it plans to diversify its services to aid its sustainability and so these will need to be amended accordingly. It has been agreed with that this should be a condition of grant. A revised budget was submitted by the applicant after discussion at the assessment visit (attached to the application) which the recommendation reflects:

**£155,000 over 3 years (£51,000, £50,000, £54,000) for the salary of a f/t GP Link Officer, volunteer costs and associated project costs. Release of the third quarter's payment in year 1 is conditional on the organisation amending its charitable objects within 6 months of the grant commencing, to accommodate a broader remit of services.**

### Funding History

Meeting Date	Decision
18/03/2010	£120,000 over three years (3 x £40,000) towards the costs of a part-time (16hpw) project leader, associated running costs and some care hours for a support service for people with dementia and their carers.

### Background and detail of proposal

The need for early intervention has been identified at Strategic Partnerships across the three boroughs and through the Care Commissioning Group strategic report, with

an estimation that individual carers present for non-medical reasons 6-8 times per year. Although GP practices have a duty to have a register of carers, there is a lack of clarity about the responsibility of support for those identified carers. Added to this, historically it has been difficult to work with GP surgeries, with Practice Managers unwilling to share information and GP's saying they do not have time or knowledge of services to refer people onwards.

The aim of this project is to break down those barriers with GP surgeries, building relationships with Practice Managers, raising awareness of support and services available and providing a resource of support to address the issues which underpin the non-medical presentation at GP surgeries and A&E. BCC has a track record of providing this type of support through befriending services and has excellent networks with other voluntary sector organisations for referral when in need of specific expertise.

BCC is rooted in and responsive to the needs of the local communities in which they operate, 93% of its staff live within these communities and 31% are from BME communities (reflecting the local population), providing a deep knowledge of issues affecting those communities.

### Financial Information

BBC is highly dependent on Local Authority Grants and Contract income (58%) and Personal Independence Payments income (28%), which provides an area of risk in the future. BCC is aware of this and is implementing its Business Development Strategy including diversifying income sources, of which this application is one. I have referred BCC to your Strive programme with Cranfield Trust for further support with their Business Development.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Audited Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	910,759	885,296	957,565
- % of Income confirmed @ 10/6/17	n/a	n/a	69%
Expenditure	(902,592)	(837,619)	(953,831)
Total surplus/(deficit)	<b>8,167</b>	<b>47,677</b>	<b>3,734</b>
Split between:			
- Restricted surplus/(deficit)	1,375	(1,025)	6,412
- Unrestricted surplus/(deficit)	6,792	48,702	(2,678)
	<b>8,167</b>	<b>47,677</b>	<b>3,734</b>
Cost of Raising Funds	4,570	11,721	14,340
- % of income	0.5%	1.3%	1.5%
Operating expenditure (unrestricted funds)	898,967	836,153	927,239
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	375,583	424,285	421,607
No of months of operating expenditure	5.0	6.1	5.5
Reserves policy target	449,484	418,077	463,620
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	(73,901)	6,209	(42,013)



**MEETING: 27/07/2017**

**Ref: 13866**

## ASSESSMENT CATEGORY - Older Londoners

**Eritrean Community in the UK**

**Adv: Sandra Davidson**

**Amount requested: £74,028**

**Base: Islington**

**Benefit: Islington**

**Amount recommended: £70,500**

### The Charity

Since its inception in 1987, the Eritrean Community in the UK (ECUK) has been supporting the most excluded and disadvantaged groups of the Eritrean community to improve quality of life and encourage social engagement. Its activities include generalist advice and information; youth engagement and children’s educational classes. The charity also runs weekly activities for its ageing members to improve health and well-being. By offering quality marked assured advice, overseeing a mother tongue supplementary school, and running health initiative, ECUK have been able to provide valuable services to the Eritrean community.

### The Application

ECUK is seeking a grant over three years to develop its work with older people targeting those 75+. The proposed “Healthy Solutions” project will build and expand on the current work with older members facilitating access to support and information, and encouraging participation in cultural and social activities. The request is to cover the salary of a part-time Volunteer and Health Development Officer and associated running costs.

### The Recommendation

ECUK is a trusted and well regarded charity with a proven track record of local delivery. It is proactive locally and works in collaboration with the local authority and other Voluntary and Community Sector (VCS) organisations. This project has been developed following a survey carried out in 2015/16 with a grant secured from Lloyds Bank Foundation. The report highlighted the need to provide regular activities for older people to increase confidence and social engagement. The budget headings appeared to be on the high side and the recommendation reflects a sum consistent with the Trust’s funding practice. Funding is advised as follows:

***£70,500 over three years (£25,000; £22,500; £23,000) for the salary of a part-time (17.5 hr/p/w) Volunteer and Health Development Officer (VHDO) and towards associated projects costs working with people aged 75+.***

### Funding History

Meeting Date	Decision
18/07/2012	Declined - The applicant organisation is a generalist community support agency and it is not evident from the information provided that they would have the specialist knowledge and experience to deliver this work.

### Background and detail of proposal

Many older people from the Eritrean community are isolated as a result of English language limitations and wider cultural norms. ECUK is seeking to provide a range of activities led by the VHDO, supported by a pool of volunteers, to engage older people over 75. This project will be targeted at elders with health, wellbeing and

wider social needs to increase information, advice and guidance opportunities and encourage social engagement resulting in a better quality of life. Over three years, older Eritreans will be recruited as volunteers. Volunteers will be trained by the VHDO postholder to befriend and support isolated members of the community to access a wide range of agencies and services. In addition, regular bi-monthly awareness raising workshops and events with a focus on healthy eating, financial management and community engagement will be offered. The governance structure, including a steering group, will ensure members' voices are heard. Having a dedicated service, particularly for those over 75, will undoubtedly help improve quality of life for members and their general physical and psychological health.

Your officer received an email from the Council's Voluntary and Community Sector Development Officer offering her full support of their application and providing a positive review of ECUK's work. The charity is also supported by the Trust for London for its advice work.

### Financial Information

ECUK has diversified its funding streams over the last couple of years to reduce reliance on the local authority. The cost of fundraising is not disclosed in the accounts. The Charity advises that it will disclose the figure in future accounts.

Year end as at 31 March	2016 Examined Accounts £	2017 Forecast £	2018 Budget £
<b>Income &amp; expenditure:</b>			
Income	63,082	57,690	92,942
- % of Income confirmed as at 11/05/17	n/a		53%
Expenditure	(47,727)	(56,313)	(92,539)
Total surplus/(deficit)	<b>15,355</b>	<b>1,377</b>	<b>403</b>
Split between:			
- Restricted surplus/(deficit)	6,900	(563)	(1,917)
- Unrestricted surplus/(deficit)	8,455	1,940	2,320
	<b>15,355</b>	<b>1,377</b>	<b>403</b>
Cost of Raising Funds	0	0	0
- % of income	0.0%	0.0%	0.0%
Operating expenditure (unrestricted funds)	11,565	1,940	2,320
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	14,970	16,347	16,750
No of months of operating expenditure	15.5	101.1	86.6
Reserves policy target	23,863	28,156	46,269
No of months of operating expenditure	24.8	174.2	239.3
Free reserves over/(under) target	(8,893)	(11,809)	(29,519)

**MEETING: 27/07/2017**

**Ref: 13864**

## **ASSESSMENT CATEGORY - Older Londoners**

**Queens Crescent Community Association (QCCA)**

**Adv: Jack Joslin**

**Base: Camden**

**Amount requested: £199,396**

**Benefit: Camden**

**Amount recommended: £153,900**

### **The Charity**

Queen's Crescent Community Association (QCCA) was originally established in 1999 to take over and revitalise the management of the Allcroft Community Centre (now known as Queen's Crescent Community Centre), which had been left derelict for several years. QCCA is a thriving organisation currently managing five community facilities in Gospel Oak – two multi-purpose community centres; a sports and youth centre; and two nurseries – used each week by 700 local people. Working as a hub for local people, QCCA work in partnership with a number of other organisations to create opportunities that empower the local community.

### **The Application**

QCCA has been working with older people since 2002. They have noted that an increasing number of the older people that they work with are over 75, many of whom live alone and are isolated. They currently offer a daily lunch club for older people that was in full swing and well attended when your officer visited. This application is looking to increase the activities that are on offer for older people in the area. The Project Coordinator will develop new activities that will improve the health and well-being those aged over 75. Activities will range from exercise classes, gardening, workshops, daytrips and a befriending service. Older people have been involved in the development of this project and a regular steering group will be held to ensure that older people have a role in the management of the project.

### **The Recommendation**

QCCA has a good track record of delivering services for older people in Gospel Oak. This project will develop a range of new activities for older people aged 75 and over that will improve their health and ensure they lead more active lives whilst improving their mental well-being. This project is a good fit with your outcomes for the Older Londoners programme. The budget has been reduced after a discussion with your officer at assessment - a new budget is included at Appendix A to the application form. Funding is advised as follows:

**£153,900 over 3 years (£51,300; £50,600; £52,000) towards a full-time Project Coordinator, associated running costs and fitness sessions for an activity programme for older people aged 75+ living in Gospel Oak.**

### **Funding History**

Meeting Date	Decision
22/01/2009	£64,350 over three years (£24,850; £23,200; £16,300) towards a part-time (17.5 hours) project co-ordinator and other costs for the provision of an activities programme for older people, aged 65+ living in the Gospel Oak area.

## Background and detail of proposal

Age UK Loneliness Evidence Review (2014) highlighted the links between loneliness in older people and deterioration in their health and well-being. The impact of loneliness on well-being is considerable with those who report feeling lonely being seven times more likely to report low life satisfaction. A programme of community research in Gospel Oak identified that 31% of older people live in deprivation with around 70% living on their own. Many of the older people find it difficult to admit they are lonely which often prevents them from reaching out for help. QCCA offers services that allow older people to find company, activity and support without having to directly request it.

There is a significant need for this project in Gospel Oak. Local services run by the local authority have been cut heavily leaving the lunch club at QCCA as one of the only services in the area for older people to attend. The majority of the project will take place at the Community Centre which is a hub of activity in the community and in close proximity to a substantial amount of sheltered housing. The Coordinator will organise a range of activities from vegetable growing in the allotment, shopping trips, excursions to the seaside, accessible gym sessions and walks on Hampstead Heath. The lunch club will continue to run and a refurbished kitchen is planned to be installed. A grant application is currently under consideration by the Big Lottery Fund for this aspect of the project. The lunch club costs were included in the original budget but have since been removed and other costs reduced after a discussion with your officer at assessment.

## Financial Information

QCCA had listed nearly all of their expenditure in their Audited Accounts as Cost of Generating Funds. This was discussed at assessment and has been raised with their accountant and re-stated in the following years. In both years 16/17 and 17/18 QCCA has used their unrestricted surplus to cover the deficits in its restricted contracts.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Audited Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,236,088	863,621	1,031,372
- % of Income confirmed 19/05/2017	n/a	n/a	48%
Expenditure	(1,341,513)	(840,439)	(1,054,927)
Total surplus/(deficit)	<b>(105,425)</b>	<b>23,182</b>	<b>(23,555)</b>
Split between:			
- Restricted surplus/(deficit)	(156,677)	(122,002)	(59,318)
- Unrestricted surplus/(deficit)	51,252	145,184	35,763
	<b>(105,425)</b>	<b>23,182</b>	<b>(23,555)</b>
Cost of Raising Funds	1,338,513	96,504	114,932
- % of income	108.3%	11.2%	11.1%
Operating expenditure (unrestricted funds)	642,679	533,315	698,219
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	83,227	106,409	82,854
No of months of operating expenditure	1.6	2.4	1.4
Reserves policy target	0	133,329	174,555
No of months of operating expenditure	0.0	3.0	3.0
Free reserves over/(under) target	0	(26,920)	(91,701)

MEETING: 27/07/2017

Ref: 13922

## ASSESSMENT CATEGORY - Reducing Poverty

**Plan Zheroes**

**Adv: Kate Moralee**

**Base: Kensington & Chelsea**

**Amount requested: £123,070**

**Benefit: London-wide**

**Amount recommended: £108,400**

### The Charity

Plan Zheroes is a young charity registered in 2013, but born out of London Citizens as a volunteer led initiative in 2009. It aims to relieve food poverty through the redistribution of surplus food from businesses to charities that are feeding people in need such as homelessness charities and those that support the elderly, low income families and people with mental health or substance misuse issues. It achieves this through a live and interactive online platform.

### The Application

Plan Zheroes is requesting 3 years' funding towards the salaries of the CEO and Community Manager, to support the consolidation and growth of the online platform facilitating relationships between businesses and community organisations to donate/receive surplus food. The Chief Executive officer is responsible for some of the Corporate donor relations and generating new relationships, with the Community Manager being responsible for recruitment of and relationships with local community organisations and management of relationships with existing corporate members.

### The Recommendation

This project has seen steady growth since its inception, currently 209 businesses, 173 charities and 342 volunteers. It has a positive relationship with an IT company (Keytree) which has developed and built the Online Platform free of charge; and it has received support from Royal Sun Alliance in its business development processes. A reduced amount has been recommended in year 1 as the original request represented more than 50% of their forecast turnover.

**£108,400 over 3 years (£28,750; £39,350; £40,300) towards the cost of a Community Manager 0.7 fte year 1 and fte years 2 and 3) and associated project costs. Years 2 and 3 of the grant are conditional on: successful implementation of the business model; achievement of predicted performance (36 platform subscriptions year 1, 108 platform subscriptions year 2); and on the grant in any one year not exceeding 50% of the organisation's turnover.**

### Funding History

Meeting Date	Decision
18/03/2016	Application declined: An unrealistic request for an organisation which has forecast income of £95,000 for the current year

### Background and detail of proposal

From the germination of an idea in 2009 to the live interactive platform of today Plan Zheroes has secured supporters along the way. The platform was launched in 2015 and within two years has 724 users with new registration growing at a rate of 30 per month across businesses, charities and volunteers. Food donations are also growing

rapidly with over 2 tonnes of food a month being redistributed via the platform currently. The organisation has ambitious plans for growth and sustainability, with a prediction of 5 tonnes of food per month redistributed by the end of 2017 and a growth in business subscribers to the platform from 209 currently to 621 by 2020. With increased numbers of people accessing foodbanks, indicating that more people are struggling to afford to feed themselves, and increased interest in reduction of food wastage this project provides a conduit to address both issues.

Food waste of the Hospitality and Food Services sector is estimated to be 920,000 tonnes, 75% of which could be eaten by people. Additionally the number of people experiencing poverty is increasing with welfare benefit changes and austerity, little or no growth in real incomes and constantly rising cost of housing, meaning that more people will experience food poverty. This project has a USP of targeting the market of perishable food allowing charities to provide food and nutritious healthy meals to people accessing their services. Businesses fulfil their Corporate Social Responsibilities and save the costs of waste removal and land fill tax. There is currently global interest in reducing per capita food waste which could create pressure on and incentives to businesses to reduce food waste.

### Financial Information

The draft accounts 2015/16 include in-kind IT services valued at £150,000 and depreciation valued at £109,667. No in-kind IT services has been included in the 2016/17 and 17/18 forecasts though depreciation of the platform has been included. The premise of sustainability for Plan Zeroes is to generate income through a £200 annual charge to businesses with a turnover of more than £100,000. The projection is to grow from 36 paid platform subscriptions in 2018 to 180 paid subscriptions in 2020.

Year end as at 31st October	FY15/16	FY 16/17	FY 17/18
	Draft Accounts	Forecast	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	247,342	64,287	98,800
- % of Income confirmed	n/a	n/a	13%
Expenditure	(169,649)	(228,173)	(214,621)
Total surplus/(deficit)	<b>77,693</b>	<b>(163,886)</b>	<b>(115,821)</b>
Split between:			
- Restricted surplus/(deficit)	16,346	(10,888)	0
- Unrestricted surplus/(deficit)	61,347	(152,999)	(115,821)
	<b>77,693</b>	<b>(163,887)</b>	<b>(115,821)</b>
Cost of Raising Funds	0	9,500	9,500
- % of income	0.0%	14.8%	9.6%
Operating expenditure (unrestricted funds)	117,072	54,119	84,621
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	23,534	535	14,714
No of months of operating expenditure	2.4	0.1	2.1
Reserves policy target	14,996	24,543	21,155
No of months of operating expenditure	1.5	5.4	3.0
Free reserves over/(under) target	8,539	(24,008)	(6,441)

**MEETING: 27/07/2017**

**Ref: 13996**

**ASSESSMENT CATEGORY - Resettlement and Rehabilitation of Offenders**

**Carney's Community**

**Adv: Jack Joslin**

**Base: Wandsworth**

**Amount requested: £69,654**

**Benefit: Wandsworth**

**Amount recommended: £69,600**

**The Charity**

Carney's Community (CC), a registered charity, was set up to help get disadvantaged and excluded young people off the street and away from criminal activity by giving them skills, discipline and self-respect. The Charity was set up and inspired by the late Mick Carney, a local community hero who turned around many lives through boxing. CC provides services in Wandsworth and Lambeth and aims to reduce offending, re-offending and anti-social behaviour whilst improving social mobility and community cohesion. CC provides long-term, consistent mentoring and boxing training to disadvantaged young people aged between 10 and 30. Boxing sessions are delivered at their base in Battersea or at the Fitzroy Lodge Boxing Club in Lambeth.

**The Application**

CC is looking for your support to provide long-term mentoring for young people they work with who are currently serving community sentences, to ensure they reduce their likelihood of re-offending. Mentors will be employed on a sessional basis and your funding will specifically cover the costs of the sessions that are targeted at young people who are serving community orders or engaged with probation services. The budget has been amended since the application was submitted after discussion with your officer at assessment. The original figure did not take into account a management fee or the potential increase in the London Living Wage over the period of the project. A revised budget to more accurately reflect this has been included at Appendix A on the application form. The slight reduction each year reflects the more accurate cost of sessions working with at risk young people that had changed since the original application had been submitted.

**The Recommendation**

This project is looking to work with young people who are either serving community orders or are on probation and at risk of re-offending. CC has a good track record of delivering positive interventions for at risk young people through the medium of boxing and mentoring. This project fits well with the outcomes of your Resettlement and rehabilitation of offenders programme as it will work with young people leaving custody or serving community orders to help them resettle back into the community and prevent re-offending. Funding is recommended based on the revised budget:

**£69,600 over three years (£22,800; £23,200; 23,600) to cover the cost of mentoring sessions and associated management costs.**

**Funding History**

Meeting Date	Decision
18/03/2016	Declined as was for both capital and revenue, whilst the capital element was not supported by an independent access audit.

## Background and detail of proposal

The Borough of Wandsworth combines areas of affluence with areas of severe poverty with research showing clear links between social exclusion and crime. Wandsworth experiences issues with youth offending. Whilst 10 to 17 year olds account for 10% of the population, they account for 15% of all arrests. Young people who offend are likely to re-offend with youth re-offending in Wandsworth sitting at 35 – 40%. The work of CC looks to break this cycle and help young people transition into more positive directions. Using a combination of boxing training and mentoring they work with young people to improve their discipline, self-respect and improve their emotional well-being. This project is focused on the young people who attend CC's boxing sessions who are currently serving community orders and are at risk of re-offending. Most of the young people they work with have very troubled pasts and complex needs which have led them into a life of crime and offending.

Mentoring is offered in two ways and always focused on the young person and their needs. First of all mentoring sessions will be offered during the boxing training sessions. Mentors will develop trust with young people during boxing sessions and will encourage them to enter into the one-to-one mentoring programme where more intensive work can be done. CC do not put a timeframe on mentoring and find that being available and consistent has proved to be beneficial for the young people they work with who lead chaotic lives. Your funding will allow for CC to continue to target the most at risk young people providing them with new opportunities and a way out of a cycle of offending. The projects outcomes aim to reduce re-offending but also provide the young people they engage with a more positive future as they transition from their community orders back into society.

## Financial Information

CC did not have a reserves policy listed in their accounts ending 31 January 2016. After discussion with your officer at assessment the Trustees have now agreed on a suitable reserves policy.

Year end as at 31 January	2016	2017	2018
	Examined Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	211,610	182,930	195,800
- % of Income confirmed as at 26/06/2017	n/a	%	51%
Expenditure	(207,299)	(212,932)	(181,700)
Total surplus/(deficit)	<b>4,311</b>	<b>(30,002)</b>	<b>14,100</b>
Split between:			
- Restricted surplus/(deficit)	7,116	(46,360)	(20,850)
- Unrestricted surplus/(deficit)	(2,805)	16,358	34,950
	<b>4,311</b>	<b>(30,002)</b>	<b>14,100</b>
Cost of Raising Funds	28,898	7,541	5,700
- % of income	13.7%	4.1%	2.9%
Operating expenditure (unrestricted funds)	137,490	61,712	44,200
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	72,913	42,911	57,011
No of months of operating expenditure	6.4	8.3	15.5



**MEETING: 27/07/2017**

**Ref: 14010**

## **ASSESSMENT CATEGORY - Resettlement and Rehabilitation of Offenders**

**Synergy Theatre Project**

**Adv: Sandra Davidson**

**Amount requested: £93,709**

**Base: Southwark**

**Benefit: London-wide**

**Amount recommended: £93,700**

### **The Charity**

Established in 2000, Synergy Theatre Project (STP) works towards rehabilitation and resettlement of prisoners, ex-prisoners and young people at risk of offending. Using theatre and related artistic activities to raise awareness of the wider issues surrounding criminal justice, STP challenges offender stereotypes. Their work is founded on the belief that theatre can be transformative and can contribute to building a more positive future for all. STP is committed to artistic excellence, believing it to be an integral part of achieving its mission.

STP's work comprises the following strands of activity:

- Theatre productions performed by prisoners and ex-prisoners working alongside professionals in prisons, theatres and schools;
- Education programmes targeting young people at risk of offending – delivered by professional practitioners supported by trained ex-prison facilitators, comprising an annual touring production and bespoke projects;
- New writing programmes cultivating plays by those with experience of the criminal justice system;
- Synergy Studio, a theatre based training, work placement and employment programme for prisoners and ex-prisoners to develop specific creative and broader work-related transferable skills, aiding the transition from resettlement to work.

Since 2000, Synergy has produced: 28 productions, including 6 specifically for young people, 33 courses with prisoners and ex-prisoners, 73 young people's projects, 3 prison scriptwriting competitions, 50 rehearsed readings and 2 short films. Over 1,300 prisoners and ex-prisoners and 4,000 young people at risk have participated in projects, reaching audiences over 35,000.

Synergy's current annual programme includes 2 productions, 8 courses, 9 bespoke young people's projects and 24 role play training sessions, impacting approximately 120 prisoners/ex-prisoners, 300 young people at risk of offending and audiences of 1,700.

### **The Application**

The charity is seeking support for its core running costs to continue and to enable it to scale up activity and widen access for prisoners/ex-prisoners. The creative programme is building on existing work which will engage beneficiaries inside prison and offer a range of practical opportunities upon release, including involvement in theatre projects; and training in performance, stage management, script writing and film. STP will continue to offer accreditation, work placements, and employment, both within the organisation and through a range of partnerships with external organisations, strengthening progression opportunities for beneficiaries.

### **The Recommendation**

STP engages the public with the lives, voices and experiences of those in the criminal justice system through its productions and debates. It is well run with a clear

policy to reach diverse, mixed audiences that bring together mainstream arts attenders, criminal justice/rehabilitative professionals, prisoners, ex-prisoners and young people at risk of offending as appropriate for each production:

***£93,700 over three years (£30,400; £31,300; £32,000) towards 25% of the full-time Artistic Director's salary and the General Manager's salary, and associated project costs of a creative programme to support prisoners/ex-prisoners.***

### **Funding History**

Meeting Date	Decision
08/07/2010	£74,000 over three years (£22,000; £23,500; £28,500) towards the salary costs of an Education Manager and running costs of a project to train and support ex-offenders in drama-related projects.

### **Background and detail of proposal**

STP has developed strong working relationships with internationally renowned arts and education partners including: V&A, Young Vic, Royal Opera House, Unicorn Theatre, Theatre 503 and Morley College to name a few. Existing evidence, including that from STP reports demonstrates the criminal justice system contains disproportionately high number of disadvantaged groups:

- 26% of female and 16% of male prisoners stated they received treatment for a mental health issue in the year before entering custody.
- 47% of prisoners have no qualifications.
- 26% of the prison population (22,079 people) are from a minority ethnic group. This compares to around 1 in 10 of the general population.
- Less than 1% of all children in England are in care, but 33% of men and 61% of women in custody have been in care.

Upon release prisoners face multiple, and often overwhelming, difficulties and disadvantage. Many have personal issues such as addiction and substance misuse, in addition to a volatile or inadequate home life. Many find it almost impossible to overcome the stigma associated with being an ex-prisoner when trying to find employment or continue their education. Active engagement in STP's projects provides a focus and encourages the development of creative skills and helps overcome negative attitudes and unhelpful patterns of thinking and behaviour – key to reducing re-offending. Feedback is sought from project members at all stages of a project, which enables the staff team to monitor their personal rehabilitative progress. Of the participants of the programme over the last year 98% have not re-offended, 64% are in further or higher education and 95% report increased skills and self-esteem. STP has built a solid reputation for the quality of its work and is well respected in the field of arts and criminal justice, providing holistic, cohesive support to beneficiaries.

### **Financial Information**

STP receives significant funding from the Big Lottery, with support from various Trusts and Foundations. The charity advises that the increase in expenditure forecast for the current year is due to staff expansion following a recent strategic review. The Trustees' policy is to build up reserves equivalent to of three months

personnel cost. As part of their Strategic Plan over the next three years, the charity aims to generate income from new funding streams and earned income from Synergy Services to achieve an increase in unrestricted reserves.

Year end as at 31st May	FY 15/16	FY 16/17	FY 17/18
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	325,989	388,672	484,072
- % of Income confirmed as at 22/06/17	n/a	n/a	54%
Expenditure	(309,697)	(382,779)	(488,516)
Total surplus/(deficit)	<b>16,292</b>	<b>5,893</b>	<b>(4,444)</b>
Split between:			
- Restricted surplus/(deficit)	0		0
- Unrestricted surplus/(deficit)	16,292	5,893	(4,444)
	<b>16,292</b>	<b>5,893</b>	<b>(4,444)</b>
Cost of Raising Funds	24,250	20,471	21,376
- % of income	7.4%	5.3%	4.4%
Operating expenditure (unrestricted funds)	37,293	35,361	75,523
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	41,052	46,945	42,501
No of months of operating expenditure	13.2	15.9	6.8
Reserves policy target	39,344	47,031	52,678
No of months of operating expenditure	12.7	16.0	8.4
Free reserves over/(under) target	1,708	(86)	(10,177)

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MEETING: 27/07/2017

Ref: 14021

## ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Aston-Mansfield

Adv: Sandra Jones

Base: Newham

Amount requested: £143,496

Benefit: Newham

Amount recommended: £144,000

### The Charity

Aston-Mansfield (A-M) was formed in 2000 from the merger of two well-established local organisations: the Aston Charities which had long assisted the poor of the East End; and the Mansfield Settlement which was an initiative of Oxford's Mansfield Hall (now College). Both bodies were firmly rooted in nineteenth century Christian-based philanthropy. The main home for Aston-Mansfield is Durning Hall in Forest Gate. Its activities include arts, dance, sports and health sessions; play schemes, basic skills classes, after school clubs, community café etc. It provides a space for hundreds of small local groups to meet each year as well as office space for small charities, which also benefit from A-M's in-house Community Involvement Unit (CIU) whose main programmes are: community development, lifelong learning, and healthy living.

### The Application

The applicant is seeking support to provide a range of finance services and tools to local organisations over a three year period. This will be achieved through the employment of a part-time Project Lead (3 days per week), part-time Project Worker (2 days per week), 2 volunteers for 3 days per week and associated running costs.

### The Recommendation

A-M is a well-established infrastructure organisation which has a strong track record of delivery in Newham. It is considered to be the Borough's chief infrastructure group as there has not been a Council for Voluntary Service for some years. The charity's CIU has experience of offering capacity-building support for over 25 years working with over 200 small and emerging groups. The project was worked up following information from the sector, as well as feedback from a number of funders in the borough which identified a consistently poor standard of financial reporting and funding applications. The charity submitted an earlier application in March (subsequently withdrawn) that was requesting 2 f/t staff and a large amount towards core costs. This has now been revised down, with the outcomes remaining the same and outputs only slightly lower. Given the financial position of the organisation's free reserves it is recommended that release of the grant should be subject to the submission of satisfactory quarterly management accounts, including the cash balance held.

***£144,000 over three years (£48,000; £47,000; £49,000) towards a 0.6FTE Project Manager, 0.4FTE Project worker, volunteer expenses and associated running costs. This is subject to the submission of satisfactory quarterly management accounts, including the cash balance held.***

## Funding History

Meeting Date	Decision
11/05/2017	Application withdrawn
13/02/2013	£32,350 over two years (£16,450; £15,900) for a p/t (2dpw) Outreach Worker and running costs to engage minority organisations in Newham ESOL Exchange.

## Background and detail of proposal

A-M will deliver a comprehensive programme of activity that includes workshops, training sessions, 1-2-1 surgeries and mentoring; providing a project that is tailored to the needs of the participants. Targeting small and emerging groups, the charity will deliver services that cover budget planning and writing for funding bids, full cost recovery principles for fundraisers, understanding financial reports for trustees and management committee members, recording finance. Specific workshops on pensions, opening bank accounts, building and investing reserves and selecting auditors/independent examiners will also be offered. Two larger conferences will be held, aimed at bringing together the sector and developing networks, sharing good practice and exploring ways of working together e.g. sharing 'back office' services. Corporate volunteers from the Finance Sector will be recruited to offer additional support. The organisation is very well networked and has contacts with CRS and local partners.

## Financial Information

A-M is not reliant on statutory sector funding, which is less than 10% of their income. The largest contributor is their sister organisation Aston-Mansfield Charitable Trust, set up to hold the assets and investments from Aston Charities Trust. AMCT is a grant-giving trust whose largest single grant each year is to A-M (between £400,000 - £500,000 per annum). During 2015/16 the organisation explored new business models and has been supporting the children and young people's element to turn into a social enterprise 'from cradle to career'. This began to be implemented in the current year, and will continue into 2017/18. A-M stated that if they were to get into financial difficulties they could approach AMCT for additional funds as is the case in implementing their new strategy. If the position were to deteriorate further ACMT will step in and oversee remedial action to return the charity to the agreed level of reserves and ensure that operations are viable.

Year end as at March	2015/16	2016/17	2017/18
	Audited Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,323,109	1,516,634	1,604,557
- % of Income confirmed as at 05/07/17	n/a	n/a	100%
Expenditure	(1,335,262)	(1,543,167)	(1,736,103)
Total surplus/(deficit)	<b>(12,153)</b>	<b>(26,533)</b>	<b>(131,546)</b>
Split between:			
- Restricted surplus/(deficit)	(11,660)	(16,658)	0
- Unrestricted surplus/(deficit)	26,516	(9,875)	(131,546)
Endowment Fund	(27,009)		
	<b>(12,153)</b>	<b>(26,533)</b>	<b>(131,546)</b>
Cost of Raising Funds	78,201	79,172	75,486
- % of income	5.9%	4.9%	5.0%
Operating expenditure (unrestricted funds)	1,220,488	1,457,601	1,492,070
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	385,478	376,353	250,051
No of months of operating expenditure	3.8	3.1	2.0
Reserves policy target	305,122.0	364,400.3	373,017.5
No of months of operating expenditure	3	3	3
Free reserves over/(under) target	80,356	11,953	(122,967)

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**MEETING: 27/7/2017**

**Ref: 13989**

**ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector**

**Enfield Voluntary Action**

**Adv: Geraldine Page**

**Base: Enfield**

**Amount requested: £118,110**

**Benefit: Enfield**

**Amount recommended: £100,500**

**The Charity**

Enfield Voluntary Action (EVA) is the Council for Voluntary Service for this north London borough. It provides direct support services to assist the development of the voluntary and community sector in the borough; runs the borough's Volunteer Centre; coordinates partnerships; and acts as the representative voice of the sector. EVA maintains a database of approximately 500 local voluntary and community organisations, 150 of these organisations are EVA members, including a few larger charities such as the local Age UK and CAB, but mostly comprised of smaller organisations including after school clubs, Black and Minority Ethnic organisations, faith groups, supplementary schools and an increasing number of social enterprises.

**The Application**

In June 2014 you awarded EVA £123,000 over three years to provide monitoring and evaluation and financial training support to voluntary and community organisations (VCOs) in Enfield. This application requests continuation funding for EVA to continue these services and in addition to facilitate development for opportunities for social enterprise and social prescribing.

**The Recommendation**

EVA is well run and connected; it is supportive and engaged with the Way Ahead. Staff have strong experience of the local voluntary sector and are committed to their own professional development to ensure they are able to provide the most accurate advice to organisations. The application demonstrates sufficient strategic importance to meet your policy on continuation funding. Your 2016 annual review found that Enfield had a low ranking by grant amount awarded by the Trust (27 of 33), despite a relatively high deprivation score. Your practice is to award funding for up to one full time equivalent post; however the original request from EVA exceeded this and has been revised accordingly (see appendix 1 attached to the application form).

***£100,500 over two years (£50,000; £50,500) towards the salaries of a Community Accountant (21hrs) and Development and Funding Advice Manager (15hrs) and running costs, to provide monitoring and evaluation; financial; social enterprise and social prescribing training support to voluntary and community organisations in Enfield.***

**Funding History**

Meeting Date	Decision
19/06/2014	£123,000 over three years (£26,200; £48,200; £48,600) towards the salaries of a Community Accountant (20hrs) and Development and Funding Advice Manager (20hrs) and on-costs, to provide monitoring and evaluation and financial training support to voluntary and community organisations in Enfield.

## Background and detail of proposal

EVA has delivered very well against the outcomes of the original grant, now coming to the end of its final year (Oct 2017). This application looks to continue to improve the financial management and impact reporting of VCOs for a further 2 years, as need is still very significant. In addition through learning from the original grant funded activities EVA have identified a 'restructuring strategy' essential for VCOs to continue to provide services against a backdrop of increasing demand and reducing resources. With continuation funding EVA would also provide support and training for VCOs in social enterprise skills and social prescribing. Social enterprise presents a different funding model for VCOs to adopt, that may otherwise close or fail to start due to increased competition for charitable trust funding and growing completion or withdrawal of local contracts and grants. Trading and job creation will bring benefits to deprived areas, whilst allowing emerging issues to be addressed. Social prescribing is growing in popularity with new models across the country bringing positive outcomes for patients, reducing NHS costs and sustaining much needed voluntary services. To build a strong foundation for social prescribing the voluntary sector needs to be sustainable with a diverse mix of activities, to enable them to offer a reliable and consistent service to patients. This would particularly benefit Enfield, which has a higher rate of prescribing anti-depressants, antibiotics and statins than the London average (Enfield Joint Strategic Needs Assessment, 2017), which means money could be saved and health outcomes could be improved.

## Financial Information

EVA has an excellent relationship with Enfield Council who has offered EVA security in writing of funding until September 2018 and verbal reassurance until March 2019, without any further cuts and annual renewal continuing after that. EVA Trustees have consciously taken the decision to use reserves (which are in a healthy position) to further their strategic objectives, hence the unrestricted deficit in 2017 and 2018. £38,991 of reserves has been agreed for use towards this project.

Year end as at 31 March	2016	2017	2018
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	378,998	282,434	318,864
- % of Income confirmed as at <b>06/06/2017</b>	n/a	n/a	89%
Expenditure	(374,009)	(327,909)	(371,339)
Total surplus/(deficit)	<b>4,989</b>	<b>(45,475)</b>	<b>(52,475)</b>
Split between:			
- Restricted surplus/(deficit)	(21,234)	(29,883)	(35,465)
- Unrestricted surplus/(deficit)	26,223	(15,591)	(17,010)
	<b>4,989</b>	<b>(45,474)</b>	<b>(52,475)</b>
Cost of Raising Funds	43,039	25,546	28,188
- % of income	11.4%	9.0%	8.8%
Operating expenditure (unrestricted funds)	151,089	147,824	154,618
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	351,067	335,476	318,466
No of months of operating expenditure	27.9	27.2	24.7
Reserves policy target	333,798	333,798	333,798
No of months of operating expenditure	26.5	27.1	25.9
Free reserves over/(under) target	17,269	1,678	(15,332)

MEETING: 27/07/2017

Ref: 14020

## ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

**Voluntary Action Islington Limited**

**Adv: Sandra Jones**

**Base: Islington**

**Amount requested: £52,826**

**Benefit: Islington**

**Amount recommended: £50,000**

### The Charity

Voluntary Action Islington (VAI) is the council for voluntary service serving the London Borough of Islington. As well as providing some capacity building support and an information service, the charity has been responsible for running the borough's volunteer centre since 2009. The organisation represents Islington's voluntary and community sector in various cross-sectoral partnerships and networks, enabling its members to influence change. Operating from premises in Pentonville Road, the charity provides a resource centre used by the voluntary sector for hiring desk space and meeting and conference rooms.

### The Application

In March 2015, you awarded a grant of £96,900 over two years (£48,000; £48,900) focused on VAI's role as the borough volunteer centre to provide support to improve induction and training for volunteers and create volunteer supervisor roles in small and medium sized community organisations. This grant is due to end in September 2017, and the charity now seeks a third year's funding for this project to cover the costs of a part time project officer at increased hours, some communication officer time and associated running costs.

### The Recommendation

The organisation wishes to slightly change the structure of the project, to provide more support to organisations on an individual basis, and less generic training courses. Feedback from the participants identified that this was a more effective way of delivering support, particularly for smaller organisations that were unable to make the time to attend the training programme in its entirety; and they requested support at their own premises. The recommendation is slightly less than requested as the amount for core funding was high in comparison with the previous application.

***£50,000 for a third year towards VAI's volunteer project. The funding covers a Project Officer (3.5 days per week), Information and Communication Officer (2.5 hours per week), associated running and training costs.***

### Funding History

Meeting Date	Decision
12/03/2015	£96,900 over two years (£48,000, £48,900) for the costs of a (2.5dpw) Project Officer; 1dpw Senior Project Officer; and associated running costs and the costs of delivering training courses.
30/06/2011	£91,000 over two years (£45,000; £46,000) towards the salary and on-costs of a full-time Development Officer.

### Background and detail of proposal

The project will continue to work with small and medium sized organisations in Islington to develop the skills of staff and volunteers. This will be achieved by

offering training to 30 staff and volunteers from 15 organisations on effective management of volunteers as well as offer advice sessions to 60 individuals focusing on supporting the development of relevant policies and procedures, induction and developing new volunteer supervisor roles to increase the range and quality of volunteering leading to increased quality activities.

The level of support is the same as the previous two years, although they are changing the methodology slightly, offering less training courses and more support to organisations on an individual basis.

### Financial Information

Forecast income for 2017/18 covers grant funding that has been approved, and does not include generated or investment income, such as fees and rental income. The figure calculated for this is based on previous year's income. The organisation states that they treat the cost of generating funds as relating to the costs of raising donations and their accountant includes work on applications that generates income for charitable activities as a cost of charitable activities, and this includes grants. The charity has a free reserves target of "between 30% and 70% of annual expenditure, averaging at 40% over a three year period". This has been difficult to calculate for the forecast figures, and so officers have adopted using a target of 40% of operating expenditure. In order to move towards their policy, the charity has been using its free reserves to enable them to move from a position where most of its income is from statutory sources to one of more varied streams including the rental space at the charity's resource centre.

Year end as at March	2015/16	2016/17	2017/18
	Audited	Forecast	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	493,627	418,933	413,875
- % of Income confirmed as at 31/05/17	n/a	n/a	28%
Expenditure	(535,687)	(444,069)	(471,898)
Net gain/loss on investments	(16,828)		
Total surplus/(deficit)	<b>(58,888)</b>	<b>(25,136)</b>	<b>(58,023)</b>
Split between:			
- Restricted surplus/(deficit)	(15,473)	(9,823)	0
- Unrestricted surplus/(deficit)	(43,415)	(15,313)	(58,023)
	<b>(58,888)</b>	<b>(25,136)</b>	<b>(58,023)</b>
Cost of Raising Funds	3,966	0	0
- % of income	0.8%	0.0%	0.0%
Operating expenditure (unrestricted funds)	387,617	342,721	396,523
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	247,250	231,937	173,914
No of months of operating expenditure	7.7	8.1	5.3
Reserves policy target	155,047	137,088	158,609
No of months of operating expenditure	4.8	4.8	4.8
Free reserves over/(under) target	92,203	94,849	15,305

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Applications recommended for rejection	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

## Summary

This report and the accompanying schedule outlines a total of 4 grant applications or Eco-Audit requests that, for the reason(s) identified, are recommended for rejection.

## Recommendation

Members are asked to:

- Reject the grant applications detailed in the accompanying schedule

## Main Report

1. There are a total of 4 applications recommended for rejection at this meeting. They are listed within categories in the accompanying schedule. 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.

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**Recommended for Rejection**  
**The City Bridge Trust Committee – 27<sup>th</sup> July 2017**  
**Summary of Recommendations for Rejection - Investing in Londoners**

<b>Request Date</b>	<b>Ref &amp; Organisation</b>	<b>Purpose</b>	<b>Reason for Recommendation for Rejection</b>	<b>Grants Amount Requested &amp; Area</b>	<b>Officer</b>
<b><u>English for Speakers of Other Languages</u></b>					
April 2017	14019 East London Advanced Technology Training	Support vulnerable migrant communities to unlock and build upon their potential giving them the skills support needed to succeed in everyday life, community and work.	Despite guidance from your officer, the revised bid asks for the same level of grant albeit with far fewer beneficiaries. Based on the unit cost per individual learner, the revised bid does not represent good value for money; and is far higher than other ESOL providers.	£93,896	JXM Hackney
<i>Total English for Speakers of Other Languages (1 item)</i>				£93,896	
<b><u>Making London More Inclusive</u></b>					
June 2017	14150 St Vedast-alias-Foster	Provision of accessible toilets, accessible main entrance and fire exit and 'green room' to facilitate peoples' inclusive participation in worship and arts at the church.	The applicant has previously applied, and has been asked to withdraw as there was insufficient community use of the building. This application is no different. The church is hired out by a single group, however this group is not the applicant and there is no information about how often they use the building.	£50,000	GP City
<i>Total Making London More Inclusive (1 item)</i>				£50,000	

<b>Request Date</b>	<b>Ref &amp; Organisation</b>	<b>Purpose</b>	<b>Reason for Recommendation for Rejection</b>	<b>Grants Amount Requested &amp; Area</b>
<b><u>Reducing Poverty</u></b>				
June 2017	14124 Streetscape	To enable Streetscape to deliver apprenticeships in Landscape Gardening to young people who have been long-term unemployed; helping them to escape social deprivation and exclusion.	Proposal is to provide a series of apprenticeships and therefore does not meet your priorities.	£60,000 CR Lambeth
<i>Total Reducing Poverty (1 item)</i>				£60,000
<b><u>Strengthening London's Voluntary Sector</u></b>				
June 2017	14149 PhotoVoice	To train equalities organisations in innovative participatory photography and digital storytelling methods to provide skills to enhance their voice, advocacy and representation capacity and skills.	Organisation is ineligible to be considered under this funding stream as it is not a 2nd tier/ membership organisation.	£92,850 CR Lambeth
<i>Total Strengthening London's Voluntary Sector (1 item)</i>				£92,850
<b>Grand Totals (4 items)</b>				<b>£296,746</b>



<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Grants/expenditure considered under Delegated Authority	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>

## Summary

### Recommendation

Members are asked to:

- Receive this report and note its contents

### Main Report

Following the approval of the Court of Common Council on 16<sup>th</sup> October 2014, the Chief Grants Officer may make decisions on applications of up to £10,000. Decisions on applications of over £10,000 and up to £25,000 may be approved by the Chief Grants Officer in consultation with the Chairman and Deputy Chairman.

Decisions on applications of over £25,000 and up to £50,000 may be approved by the Chief Grants Officer in consultation with the Chairman and Deputy Chairman, with reference to the Chamberlain.

2 of the items below are for the costs of an eco-audit, where no monies are paid to the recipient organisation, rather the funds approved are used by the Trust to commission and appoint qualified professionals to undertake an individual audit for the named charity.

The total amount of expenditure and number of items approved under delegated authority this financial year (inclusive of those below) are shown in Table 1.

### Requests < £10k

<b>Sea-Change Projects</b> (Approved 12/06/2017)	£940 to commission an independent access audit to inform the fitting out of a Thames Sailing Barge.
<b>Latin American Disabled People's Project</b> (Approved 15/06/2017)	£2,400 (for up to 6 days) to deliver an eco-audit.
<b>West Silvertown Foundation</b> (Approved 28/06/2017)	£2,200 (for up to 5.5 days) to provide an eco-audit.

**Requests £10k - £25k**

None

**Requests £25k - £50k**

None

**Table 1 – Funds approved under delegated authority in financial year to date.**

Applications reported to Committee	< £10k		£10k - £25k		£25k - £50k	
	£	No.	£	No.	£	No.
May 2017	£5,600	2	£0	0	£30,550	1
June 2017	£1,610	2	£17,400	1	£0	0
July 2017	£5,540	3	£0	0	£0	0
<b>Total for year to date</b>	<b>£12,750</b>	<b>7</b>	<b>£17,400</b>	<b>1</b>	<b>£30,550</b>	<b>1</b>

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Withdrawn & Lapsed applications	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>

## Summary

This report informs Members of applications received which subsequently have been withdrawn by the applicant, or lapsed due to the absence of the information required to undertake a full assessment.

## Recommendation

Members are asked to:

- Receive this report and note its contents

## Main Report

### Organisation

### Purpose of Request

#### Withdrawn Applications:

Carers Support (Bexley)

Eco audit application

- The application has been withdrawn as the charity will be moving premises.

St Vincent's Family Project

The funding pays the salary costs of three Licensed and Registered Creative Arts Therapists, who will see 12 vulnerable children with acute mental health issues.

- The applicant has chosen to withdraw in order to look at the clarity of their financial position, with a view to re-applying in the future.

Childhood Eye Cancer Trust

Three years' funding helping CHECT support families whose child is recently diagnosed with retinoblastoma, and supporting teenagers with Rb in becoming more confident and independent.

- The applicant withdrew the proposal, with the

	intention to submit a different proposal which aligns more closely with your criteria.
Millwall Community Trust	<p>Provision of inclusive sporting, education and employability opportunities to support people with disabilities and/or mental health issues to overcome financial and social constraints.</p> <p>- Charity withdrew after discussion with your officer, and will return with a revised application.</p>
Alzheimer's Society	<p>Empowering people with dementia and their carers through support, advocacy, advice, and activities to help them remain active in their community and reduce isolation.</p> <p>- Organisation has withdrawn this application with a view to submitting a more realistic proposal in the near future.</p>
Whitefoot and Downham Community Food Plus Project Limited	<p>We wish to recruit a part time manager to lead and develop the service and developing our volunteering capacity and training resources</p> <p>- The organisation withdrew the application with a view to submitting a proposal more closely aligned with your criteria at a future date.</p>
Media Trust	<p>To address the media, communications and campaigning skills and knowledge gap of equalities organisations and improve their ability to share impact stories about their work</p> <p>- The applicant has decided to withdraw its application, and plans to resubmit a proposal at a later date.</p>
Three Faiths Forum (3FF)	<p>We will appoint a Volunteering Development Co-ordinator, who will launch an 'Interfaith Volunteering' kitemark scheme drawing upon our organisational expertise in managing diverse volunteering programmes.</p> <p>- The applicant withdrew its application with the view to resubmit a proposal which more closely meets your priorities</p>
Stepping Stones: Safer London Foundation	<p>We are applying for a capacity building grant to position the organisation and unlock the possibility of securing social finance.</p>

- The organisation have chosen to withdraw in order to concentrate on a second stage application to an alternative investment readiness provider.

Stepping Stones:  
City Year UK

We wish to test a payment-by-results model of school commissioning (specifically outcome measurement and pricing) as a replacement for our current fee-for-service model.

- The applicant has withdrawn due to strategic priorities in the organisation.

### **Lapsed Applications**

Refugee Therapy Centre

To offer specialist intercultural psychotherapy to refugees unable to access appropriate services due to complex nature of their trauma, treatment needs and or associated cost.

- The applicant did not respond to any requests for further information.

St Richard of Chichester C of E  
Church, Hanworth

We are applying for an access survey grant as we plan a major project to upgrade our facilities and make them more accessible for all.

- The application has been lapsed as the applicant organisation did not respond to a request to provide additional information.

Free Representation Unit

To provide additional capacity to provide representation in the social security tribunal.

- The applicant did not provide financial information which was requested as part of the assessment process.

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Variations to grants awarded	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Information</b>

## Summary

This report informs Members of 6 grants where a variation has been agreed by the Chief Grants Officer since your last meeting.

## Recommendation

Members are asked to:

- Receive this report and note its contents

## Main Report

Since your last meeting, variation to the grants outlined below has been agreed by the Chief Grants Officer, in line with the revised delegated procedure for the amendment of grants as agreed by your Committee in October 2004.

### **St Barnabas Church**

A grant of £4,500 was awarded in May 2017 to meet the cost of an access audit. The audit has now been completed and at a lower cost of £2,145 hence the balance of £2,355 has been revoked.

### **The Sir Oswald Stoll Foundation**

The above received a grant of £1,150 for an access audit in January 2017. They have now decided not to proceed with this work hence the full sum has been revoked.

### **The Greenwood Community Centre Charity**

In early June 2017 £890 was awarded to this charity for an access audit. The final cost was £552 so the balance of £338 was revoked.

### **Communities into Training and Employment**

This organisation was awarded £49,500 in July 2015 through the Stepping Stones programme. During the life of the grant the organisation lost a significant element of its overall income and decided on a planned closure. Learning from the Stepping Stones project for the time that it ran has been captured, whilst the unused sum of £17,350 has been written back.

### **St Augustine's Community Care Trust**

In March 2016 you agreed £99,500 over three years towards the salary costs of a f/t Chief Operations Officer and running costs of the Homelink Day Respite Service. The postholder left in April 2017 after which the organisation decided to amend the overall staffing structure. As a result permission has been given for the remainder of your grant to be used towards the salary costs of two posts – the Business Manager and the Centre Manager – with the outputs and outcomes remaining as originally intended.

### **London Funders**

In March 2017 you approved £300,000 over 3 years towards the further development of the London's Giving initiative. A condition on the grant required that the role of Project Director (at the time filled on a temporary contract) be filled through an open recruitment process. Since the grant was awarded a series of significant events has led to the need for London funders to be able to operate as smoothly and effectively as possible in the immediate future. This means that it is now more appropriate to amend the condition to one where recruitment for the Project Manager post takes place within six months after the new Director of London Funders takes up their post (scheduled for September 2017).

### **Ciaran Rafferty**

Principal Grants Officer

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	27 <sup>th</sup> July 2017
<b>Subject:</b> Evaluation summary – Moving on Up project	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For information</b>

## Summary

This report presents an evaluation summary of the Moving on Up project which was co-funded between CBT and Trust for London

## Recommendation

Members are asked to:

- Note the report

## Main Report

In September 2014 you agreed a grant of £400,000 payable to Trust for London to support, with them, a 2-year initiative aimed at reducing the disparity in rates of unemployment between young black men and their white counterparts. Following an open application process a small number of individual projects were funded across London, each taking a slightly different approach to the issue.

The programme, recently ended, was subject to external evaluation by The Social Innovation Partnership. Their final report has now been completed and a summary of the key findings is attached (this is a monochrome version, a colour copy is available from your officers). At the time of writing this Summary was to be presented at a public launch on 18<sup>th</sup> July 2017.

Discussions are currently underway concerning the possibility of a follow-up scheme (Phase 2) although, as yet, the detail of what this might incorporate is unconfirmed. A further report on this aspect will be brought to your Committee in due course.

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# MOVING ON UP

Improving employment opportunities  
for young black men

Evaluation summary



# INTRODUCTION

Moving on Up (MoU) is a special initiative to increase the employment rates for young black men in London. This two-year initiative is funded by Trust for London and City Bridge Trust, in partnership with the Black Training and Enterprise Group (BTEG), and evaluated by The Social Innovation Partnership (TSIP).

Young black men have consistently experienced more unemployment than young men of other ethnicities. In London in 2013, the employment rate for young black men was just 56%, compared to 81% for young white men. Though this disparity improved over the next two years, it has stagnated since March 2016. This disparity does not just reflect educational differences between the two groups – in 2015, young black graduates were also more likely to be unemployed than young white graduates one year after graduating (9.7% vs 4.6%).

The MoU Initiative aims both to directly increase the employment rate amongst young black men in London through supporting targeted interventions; and to generate learning that could influence mainstream employment support providers and funders/commissioners. £1 million was invested and grants were awarded to six organisations: Action West London (formerly Action Acton), Elevation Networks, Hackney CVS and partners, London Youth, Making the Leap and Step Ahead. These organisations use a range of different models to support young black men to transition successfully into employment. Work started in March 2015.



This report is a summary of an independent evaluation undertaken by The Social Innovation Partnership - [www.tsip.co.uk](http://www.tsip.co.uk). The full report can be found on [www.trustforlondon.org.uk](http://www.trustforlondon.org.uk)

# KEY FINDINGS

## Key findings relating to the MoU projects

- **271 young black men are known to be in paid work following their participation in MoU.** This equates to a job entry rate of 40-60%. This finding is based on having data for 66% of the 683 participants that took part in MoU, so the real figure across 100% of participants is likely to be somewhere between 271 and 410. This success rate is comparable to similar programmes in the field.
- **MoU had the biggest impact on participants' attitude, confidence and understanding of work.** Whilst some improvement was seen in career direction and more practical job application skills, survey and interview data indicates that MoU's impact was driven more by psychological outcomes – with young black men being more motivated, confident, and aware of what employers are looking for in terms of skills and behaviour.
- **The thing that MoU participants valued most about the projects was that the staff cared.** Participants consistently appreciated, at times effusively, that the project staff always gave them their time, showed a genuine interest in their success and wellbeing, and never gave up on them. Their descriptions imply, and sometimes explicitly state, that this level of care was rare among people they had encountered from other projects or agencies.

*'You feel more than just a number, you feel like they're actually dedicating their time to you. That's one thing that I really cherished about it.'*

- **MoU participants also appreciated when the projects were targeted and tailored to young black men.** Many interviewees said they felt empowered by people caring about young black men as a group, and felt like they were interacting with people who understood them and the specific issues they were facing.

*'The course did state young black males, it did actually state that. I thought that was really cool, to be honest, because it's like, okay, there's people who actually care about this topic and issue'*

## Key findings relating to the MoU participants

- **Young black men have to deal with barriers which are additional to those facing other young people trying to find jobs.** Three-quarters of the project participants interviewed for this evaluation believe that as young black men they need to work harder than other young people to get a job. This view results from their own negative experiences of trying to find work, which include instances of perceived discrimination from employers, and from the experiences or views of their friends and family.

*'When I was younger, my grandma used to tell me, 'If you're black, you have to work twice as hard.' She always used to tell me that. I didn't like the idea of thinking, 'Why am I not good enough that I have to work twice as hard?' Are my opportunities not going to be as great, just because of the colour of my skin?'*



- **MoU participants had high aspiration to begin with.** Lower aspiration is often identified as a key barrier to young people gaining employment, but MoU survey data showed that these young men had very high aspiration to begin with, with little room for improvement. Baseline survey scores were higher for this outcome than for any other. This indicates that at least for this group of young black men, it is not a lack of aspiration that is preventing them from securing employment.
- **Social capital is still a key area of disadvantage.** In stark contrast to aspiration, MoU participants scored lowest on baseline survey questions relating to social capital. These questions focus on using personal relationships to find work. This was also the only outcome not to see any improvement at follow-up, and to receive almost no references in the participant interviews. Clearly this is an area that may need more intense, targeted support, and/or further research to explore this in more detail.
- **MoU participants had consistently negative views of Jobcentre Plus.** The participants' positive views on project staff stood in contrast with their views of support from the JobcentrePlus (JCP). 50% of survey respondents rated the value of JCP support as 1 on a scale of 1-5, and this was reiterated by half of the interviewees who said the support was not useful, the staff didn't care about helping them, the sanctions are unfairly punitive and the job application targets are unrealistic and unhelpful.

## Key findings relating to the MoU Initiative

- **Engaging employers is a key challenge.** Supporting the young black men is only one side of the issue of their higher rates of unemployment – the supply-side. For this issue to be addressed successfully, the demand-side must also be addressed by engaging with employers. This has been a challenge for MoU projects throughout the initiative. MoU-commissioned research by YouGov suggested that there is a need to raise awareness amongst employers about opportunities for young black men – as they were not top of mind for most. The best approach to engaging employers might be to clearly identify the problem, explain what is currently being done about it, and explain what employers can and should do themselves – without laying the blame for the problem at employers' feet.
- **The MoU Initiative has been able to raise awareness among policymakers of the issue of young black men unemployment.** A London Advisory Group was established and received good engagement from the Department for Work and Pensions, JCP and the Greater London Authority, among others. Damian Hinds, Minister of State for Work and Pensions, visited the MoU Initiative in 2016, and there are ongoing conversations with DWP about learning from MoU's targeted approach to supporting young black men.
- **Focusing both on hard outcomes and learning can be a tricky balancing act.** The MoU Initiative and this evaluation tried to balance the need for hard outcomes with the desire for learning - to support as many young black men into work as possible, whilst learning as much as possible along the way. Whilst broadly speaking this has been a success, this juxtaposition may be particularly hard on projects, and requires careful messaging both internally and externally.



# METHODOLOGY

The evaluation that led to the key findings above had five research questions:

Area of focus	Research question
Participants	What type and level of disadvantage have the young black men who are part of the MoU Initiative faced?
	What has the participants' experience of the job market been before joining MoU?
Projects	What was the impact of the MoU projects on the participants?
	How could the projects increase their impact going forward?
Initiative	What did the MoU Initiative achieve more broadly?

To answer these research questions, the evaluation took a three-pronged approach: administrative data already collected as standard by the six MoU projects; additional surveys designed by TSIP in collaboration with projects and partners; and semi-structured interviews with young black men who received support from the projects.

In addition to this formal three-pronged methodology, more informal learning took place in relation to the fifth research question (about MoU's broader achievements) through firstly, a series of internal learning sessions conducted with the MoU projects, and secondly, various meetings and discussions between projects and partners throughout the initiative's lifetime.

# RECOMMENDATIONS

## Recommendations for programme delivery

- **Continue what works well:** Delivery organisations should continue to do the things they do well - caring and persistent staff delivering tailored support targeted specifically at young black men, and providing direct contact with employers where possible.
- **Engage employers:** To meet an increased supply of high quality young black male candidates, employers' demand must be increased too – through appealing to their self-interest as businesses, their ethical or legal obligation, or their desire to do social good. On-the-ground delivery organisations often do not have the capacity to do this on a strategic scale, and so may need specialist or dedicated support.
- **Engage media:** Similarly, to raise the awareness of this issue and/or reduce negative stereotypes in the media needs a dedicated, specialist team to drive an organised, large-scale campaign – delivery organisations often do not have the in-house capacity or expertise to drive this themselves.
- **Engage locally:** Delivery could also benefit from more local engagement – maximising enrolment into projects both by building networks among the local families and communities, and building relationships with Local Authorities and JCPs.

## Recommendations for funding and policy

- **Recognise disadvantage:** A vital starting point for funding and policymaking is to recognise the particular disadvantage that young black men face, and that this makes them a group worthy and in need of targeted support.
- **Shift balance from using the stick to providing support:** Many young black men on this project talked about the rules, targets, sanctions and punishments faced through school, the criminal justice system and/or Jobcentre Plus. The evidence from MoU suggests that providing support is a much more effective route to helping young black men achieve their potential, and that there might be value in policies taking a similar approach to engaging with young black men as the one taken by the MoU delivery organisations.

*'If you're in the workplace, there are certain things you can do and you shouldn't do ... it can be a bit of a culture shock if you haven't been trained, or at least you haven't developed the sort of skills that are required to work in an office space'*

- **Fund more support organisations:** Based on the two points above, a straightforward recommendation is to provide more funding for projects like those in MoU, which this evaluation has shown to be effective at addressing the issue of unemployment among young black men.
- **Refer to delivery organisations from Jobcentre Plus:** JCPs should systematically refer young black men to local targeted projects like MoU, to provide the support they need to find work.

## Recommendations for future research

- **Focus on learning:** This evaluation has given a good indication that initiatives such as MoU can have a positive impact on the issue of unemployment amongst young black men, but there is still much more to learn about what works best. It is important to have a target in mind for the results that any programme is trying to achieve (for example getting a certain number of young black men into employment), but it is vital that this does not overshadow a focus on learning how to increase that number even further.
- **Focus on race and discrimination:** The interviews in this evaluation strongly indicate that there are racial barriers evident in the workplace. Future research should explore this in more detail in two ways. Firstly, exploring this concept in more depth, drawing inspiration from recent social research trends on unconscious biases, micro-aggressions in the workplace and white privilege. Secondly, measuring this issue quantitatively – using interview data from this evaluation to draft survey questions that measure the different aspects of these racial barriers, and sending the survey to large numbers of young black men to more robustly identify the scale of this issue.

*'Honestly, really and truly, I appreciate the fact that you said you don't have to answer if you don't want to, but I feel like it needs to be more said. That's why I feel there's no way of talking about it or answering the question because it's a very touchy subject, and I don't think people should feel, not scared, but nervous, or whichever way, to talk about it. It's something that we do say and I think it needs to be, kind of, emphasised a lot more.'*



- **Continue mixed methods:** Ideally any further evaluation should include both quantitative and qualitative elements, to have a representative picture of how much impact there has been, as well as a deep understanding of the exact nature of that impact and how it can be increased.
- **Maximise response rate:** Any quantitative evaluation will likely benefit from a focus on maximising response rate, whether it is using SMS technology to gather follow-up data on job outcomes, or providing hands-on practical support to delivery organisations to administer surveys.
- **Gradually increase robustness:** If the three recommendations above are met, a next or simultaneous step may be to increase the robustness of the quantitative evaluation by adding a comparison group. This could provide the strength of evidence needed to scale initiatives like this at a faster pace.



## CONCLUSION

Young black men in London have perennially experienced a higher unemployment rate than young people of other ethnicities in the capital. This disparity is likely driven by a type of disadvantage that is unique to this group – experience of likely discrimination in the job market, that has the direct, tangible impact of receiving less opportunities, but can also have the knock-on psychological effect on confidence and motivation. This discrimination may stem from perceived negative stereotypes among employers and other stakeholders, that are mis-generalised from a minority and are likely actually caused in part by that discrimination, in a self-perpetuating negative circle.

The approach of the Moving on Up projects suggests a path for addressing these issues. Young black men recognised project staff for consistently showing that they genuinely cared about their success and wellbeing. Where projects targeted and tailored their approach to young black men specifically, this gave these young men a space where they could discuss the bias they have experienced with other people who have been in the same position; or where they could simply be free to develop and grow in its absence.

Through these two key principles, MoU projects were able to have a meaningful impact on young black men's motivation, confidence, and understanding of the world of work that many had had little experience of to date. Combined with a little bit of direction and preparation, this helped 40 to 60% of young black men secure paid work, which compares favourably with other similar programmes in the sector – despite young black men being one of, if not the most disadvantaged and underemployed groups of young people.

## The projects were:

**Action West London** - [www.actionwestlondon.org.uk](http://www.actionwestlondon.org.uk)

**Elevation Networks** - [www.elevationnetworks.org](http://www.elevationnetworks.org)

**Hackney CVS** - [www.hcvs.org.uk](http://www.hcvs.org.uk)

**London Youth** - [www.londonyouth.org](http://www.londonyouth.org)

**Making the Leap** - [www.mtl.org.uk](http://www.mtl.org.uk)

**Step Ahead** - [www.stepahead.co.uk](http://www.stepahead.co.uk)

Photography credits:

Front Page - Francis Augusto, P4 and P 7 - Austin Taylor-Laybourn

Published summer 2017



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[www.tsip.co.uk](http://www.tsip.co.uk)



## Trust for London

Tackling poverty and inequality

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Charity Registration Number: 205629

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust Committee	27 July 2017
<b>Subject:</b> City Bridge Trust Communications	<b>Public</b>
<b>Report of:</b> The Chief Grants Officer	<b>For Information</b>
<b>Report author:</b> Martin Hall, Communications Manager	

## Summary

This paper provides members with an update on the communications work of the City Bridge Trust (CBT).

## Recommendation

Members are asked to:

- Receive the report and note its contents.

## Main Report

### Key Audience Group Reporting

1. Appendix 1 reports communications activity between 01/06/17 and 13/07/17 against each of the four key audiences identified in your Communications Strategy.
2. This shows good levels of activity towards the Londoners, immediate stakeholders and other funders, policy makers & key commentators audiences. There was also increased activity targeting regulators and politicians, particularly around the London Borough of Culture initiative which has gained considerable interest amongst local Borough Councillors and London MPs. Your officers will continue to target this group over the coming months.

### Media Activity

3. Appendix 2 provides a detailed breakdown of the media activity supporting delivery of your Communications Strategy during this period. The majority of activity was via print or online media, with extensive coverage of both individual grants and schemes such as Bridge to Work and the LGBT sector support. The Trust's support for the London Borough of Culture was acknowledged in several national media outlets, including BBC News online &

the Guardian newspaper. The Chairman was also interviewed by both BBC London Radio and London Live discussing your Bridge to Work programme.

### **External Events Register**

4. A range of events were attended on behalf of the Trust.
5. A full list of external events attended by officers and Members on behalf of the Trust can be found at Appendix 3.

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## Appendix 1: Key Audience Groups

Audience	Face to face	Online and Printed Media channels	Online content	Direct Marketing
Londoners	All recent events were attended by Londoners. A full list can be found in the External Events table report (Appendix 3).	<ul style="list-style-type: none"> <li>• Asian Lite</li> <li>• BBC London News</li> <li>• BBC London Radio</li> <li>• Bexley Times</li> <li>• Docklands and East London Advertiser</li> <li>• Enfield Independent</li> <li>• Evening Standard</li> <li>• Hackney Gazette</li> <li>• Hackney Today</li> <li>• Huffington Post UK</li> <li>• London Bulletin</li> <li>• London Live</li> <li>• London News Online</li> <li>• Mercury (Greenwich)</li> <li>• Newham Recorder</li> <li>• Romford Recorder</li> <li>• South London Press</li> <li>• The Guardian</li> <li>• The London Bulletin</li> <li>• The Times</li> <li>• The Voice</li> <li>• Voice of Islam</li> </ul>	<ul style="list-style-type: none"> <li>• CBT Twitter (4,581 followers. 72.4K impressions* between 01/06/17 &amp; 13/07/17)</li> <li>• CBT Website (2,236 users between 01/06/17 &amp; 13/07/17)</li> </ul>	None to report

Audience	Face to face	Online and Printed Media channels	Online content	Direct Marketing
Regulators & politicians	<ul style="list-style-type: none"> <li>Public Health England</li> <li>Mayor's Fund for London</li> <li>London Borough of Culture launch</li> <li>London Councils grants committee</li> </ul>	<ul style="list-style-type: none"> <li>LocalGov</li> <li>Wired Gov</li> </ul>	Twitter activity under the hashtag <a href="#">#MyLocalCulture</a>	None to report
Immediate stakeholders**	<ul style="list-style-type: none"> <li>Social Mobility Employment Index launch</li> <li>Leathersellers Charity dinner</li> <li>East End Community Foundation business breakfast</li> </ul>	<ul style="list-style-type: none"> <li>City Matters</li> </ul>	<ul style="list-style-type: none"> <li>News items on the CoL intranet and e-bulletin.</li> <li>Regular updates in the Members' Briefing.</li> </ul>	None to report
Other funders, policy makers & key commentators	Various events including several events with the Association of Charitable Foundations and individual funders (e.g. Big Lottery Fund, Trust for London & East End Community Foundation).	<ul style="list-style-type: none"> <li>Charity Times</li> <li>Charity Today</li> <li>Disability News</li> <li>Responsible Investor</li> <li>UK Fundraising</li> </ul>	None to report	None to report

\* An Impression is the number of times CBT tweets have been delivered to other accounts and potentially viewed.

\*\* Includes CBT & CoL Officers & Members; key infrastructure bodies; grantees; potential grantees; City leaders, workers, Human Resource and Corporate Social Responsibility professionals.

**Appendix 2: Media Coverage**  
**1<sup>st</sup> June 2017 to 13<sup>th</sup> July 2017**

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
Volunteering Matters	<a href="#">UK Fundraising</a>	33,000	Report during Volunteers Week on a grant of £135,000 to help more young disabled people in London volunteer.	National trade	01/06
Voyage	<a href="#">Charity Today</a>	50,000	Reports on a £100,000 grant to help ex-offenders start rebuilding their lives and personal development.	National trade	01/06
Volunteering Matters	<a href="#">Charity Today</a>	50,000	As above.	National trade	05/06
Volunteering Matters	<a href="#">City Matters</a> (internal only)	20,000	As above. Chairman, Alison Gowman is quoted.	London	07/06
London Emergencies Trust	<a href="#">City Matters</a> (internal only)	30,000	Article on the minute's silence for the victims of the London terror attacks. Chairman, Alison Gowman is quoted on the Trust's continued support for the London Emergencies Trust.	London	07/06
Voyage	<a href="#">Enfield Independent</a> (internal only)	50,714	As above.	Regional	08/06
Voyage	<a href="#">Docklands and East London Advertiser</a> (internal only)	6,885	As above.	Regional	08/06

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
London Emergencies Trust	<a href="#">Evening Standard</a>	858,504	A letter from Chairman, Alison Gowman on how the Trust is supporting the London Emergencies Trust, distributing funds to the families and survivors of terror attacks in the capital.	London	08/06
Voyage	<a href="#">Hackney Gazette</a> (internal only)	2,148	As above.	Regional	09/06
May Committee	<a href="#">Charity Today</a>	50,000	Chairman, Alison Gowman is quoted on the award of £4million in grants to 49 charitable organisations working across the capital.	National trade	09/06
May Committee	<a href="#">Charity Times</a>	30,000	As above.	National trade	12/06
Volunteering Matters	<a href="#">London Bulletin</a>	15,000	As above.	London	13/06
Voyage	<a href="#">City Matters</a> (internal only)	20,000	As above.	London	14/06
City Philanthropy	<a href="#">Voice of Islam</a>	n/a	Cheryl Chapman, Head of Philanthropy Engagement is interviewed on the Voice of Islam Drive Time Show about Millennials and philanthropy.	Regional	16/06
Voyage	<a href="#">Newham Recorder</a> (internal only)	8,900	As above.	Regional	16/06
Scope & Toucan Employment	<a href="#">Charity Today</a>	50,000	Reports a grant of £250,000 to Scope, and £114,000 to Toucan Employment for work to support people with disabilities into jobs.	National trade	16/06



Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
Bridge House Estates	<a href="#">South London Press</a> (internal only)	22,500	Bridge House Estates is referenced in a feature on the history of London Bridge.	Regional	16/06
Scope	<a href="#">London Bulletin</a>	20,000	As above.	London	17/06
AMURT UK / Made in Hackney	<a href="#">Hackney Today</a> (internal only)	91,665	Report on a cooking project funded by the Trust.	Regional	21/06
City Bridge Trust	<a href="#">Huffington Post UK</a>	n/a	Policy Chairman, Catherine McGuinness writes about the importance of initiatives promoting social mobility and references the work done by the Trust to tackle disadvantage.	National	21/06
Toucan Employment	<a href="#">South London Press</a> (internal only)	22,500	Report on a grant for a Southwark-based charity that helps find jobs for disadvantaged young people.	Regional	21/06
Volunteer Centre Greenwich	<a href="#">South London Press</a> (internal only)	22,500	Report on the Greenwich bus tour initiative which has been funded under your Stepping Stones programme.	Regional	23/06
Volunteer Centre Greenwich	<a href="#">Mercury (Greenwich)</a> (internal only)	n/a	As above.	Regional	27/06
The Young Brent Foundation	<a href="#">The Voice</a>	30,000	The Trust is referenced in relation to an organisation developed to combat the effects of widespread cuts in funding to the children and young people's sector.	Regional	27/06

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
May Committee	<a href="#">City Matters</a> (internal only)	20,00-	A report on the Trust's awards from the May 2017 committee, which refers to your grant to Royal Hospital for Neuro-disability.	London	29/06
Royal Hospital for Neuro-disability	<a href="#">South London Press</a> (internal only)	22,500	Article on a grant of £119,000 for a sports programme for people living with severe neurological disabilities.	Regional	30/06
Royal Hospital for Neuro-disability	<a href="#">The London Bulletin</a>	15,000	As above.	London	30/06
London Borough of Culture	<a href="#">BBC London News</a>	100,001 to 500,000	Report on the launch the London Borough of Culture competition which is supported by a grant of £300,000 from City Bridge Trust.	London	30/06
London Borough of Culture	<a href="#">The Guardian</a>	157,317	As above	National	30/06
London Borough of Culture	<a href="#">LocalGov</a>	15,500	As above	Trade	03/07
Social Investment Board	<a href="#">Responsible Investor</a> (internal only)	6,000	Interview with the Chairman of the Social Investment Board, Alderman Peter Hewitt, on the challenges of deploying a social investment fund.	National trade	04/07
London Borough of Culture	<a href="#">London News Online</a>	-	As above.	London	05/07
London Borough of Culture	<a href="#">UK Fundraising</a>	33,000	As above.	National trade	06/07

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
LGBT sector funding	<a href="#">London Bulletin</a>	15,000	Report on grants totalling £700,000 given to three London based LGBT charities.	London	07/07
Sustainable City Awards	<a href="#">London Bulletin</a>	15,000	Report on the winners of the City of London Corporation's Sustainable City Awards. The Trust is referenced.	London	07/07
London Borough of Culture	<a href="#">South London Press</a> (internal only)	22,500	As above.	London	07/07
London Borough of Culture	<a href="#">City Matters</a> (internal only)	20,000	As above	London	10/07
London Borough of Culture	<a href="#">Asian Lite</a>	31,000	As above	Asian news site	10/07
Bridge To Work	<a href="#">BBC London Radio</a> (interview starts at 2hrs 36mins)	100,001 to 500,000	Interview with Chairman, Alison Gowman on the Bridge To Work programme of support getting young disabled Londoners into employment.	London	11/07
Bridge To Work	<a href="#">Charity Today</a>	50,000	As above.	National trade	11/07
Cultural Hub	<a href="#">Bexley Times</a>	15,659	As above.	Local	12/07
Moving On Up	<a href="#">The Times</a>	440,048	A letter from the Chief executive of Action West London highlighting cuts to youth services. The Trust support for 'Moving on Up', a project aimed at supporting young black men into education and employment, is referenced.	National	12/07

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
Building Bridges report	<a href="#">Wired Gov</a>	6,854	An article on a report by New Local Government Network funded by the Trust which explores the role of independent funders in society.	National trade	12/07
Building Bridges report	<a href="#">Local Gov</a>	n/a	As above.	National trade	12/07
Bridge To Work	<a href="#">Romford Recorder</a>	21,400	As above.	Local	12/07
Bridge To Work	<a href="#">Disability News</a>	n/a	As above.	National trade	13/07
Bridge To Work	<a href="#">London Live</a>	250,000	Chairman, Alison Gowman is interviewed by London Live about the Bridge to Work programme. Filming took place at Muscular Dystrophy UK.	London	13/07
LGBT sector funding	<a href="#">City Matters</a>	20,000	As above.	London	13/07

**Appendix 3: External Events Register  
Attended 1<sup>st</sup> June 2017 to 13<sup>th</sup> July 2017**

<b>Date</b>	<b>Host Organisation</b>	<b>Type of Event</b>	<b>City of London's Representative</b>	<b>Location / Borough</b>	<b>Summary</b>
05/06/17	London Funders / Trust for London	Network meeting	Ciaran Rafferty	King's Cross	An opportunity to inform and hear from funders on the issue of Disabled People's organisations.
08/06/17	Leonard Cheshire Foundation	Dinner	Chairman, Alison Gowman	Guildhall	Dinner to celebrate 100 years since birth of Leonard Cheshire
09/06/17	Barrow Cadbury	Roundtable	Chairman, Alison Gowman & David Farnsworth	Westminster	Civil Society Futures - Funder Observer Session
12/06/17	Dragon Hall	Showcase	Ciaran Rafferty & Jack Joslin	Covent Garden	An event to showcase the pioneering work of this charity using technology with young people.
13/06/17	Public Health England	Dinner	David Farnsworth	Westminster	Making London the Healthiest Major Global City: Roundtable Debate
13/06/17	The FSI	Launch Event	Sufina Ahmad	Southwark	Launch event for the FSI's Small Charities Week, held at the GLA's office
14/06/17	Walcot Foundation	Anniversary event	Jenny Field & Sandra Jones	Lambeth	Evening event celebrating Walcot Foundation's 350th anniversary
19/06/17	NCVO	Conference	Ciaran Rafferty	King's Cross	A half-day conference on the benefits of improving monitoring & evaluation systems for groups providing mentoring & befriending services. Your officer spoke from a funder's perspective.

<b>Date</b>	<b>Host Organisation</b>	<b>Type of Event</b>	<b>City of London's Representative</b>	<b>Location / Borough</b>	<b>Summary</b>
19/06/17	Homeless Link	Launch of Social Investment Programme	Kate Moralee	Westminster	Launch of Homeless Link Social Investment Programme, attended by senior representatives of Homelessness organisations, Social Investors and funders.
19/06/17	London Air ambulance	Reception	Chairman, Alison Gowman	GLA building	Funders reception
20/06/17	Dulwich Picture Gallery	Exhibition opening	Chairman, Alison Gowman	Dulwich Picture Gallery	Opening of their new exhibition
21/06/17	Social Mobility Index	Launch	Chairman, Alison Gowman	Guildhall	Launch of the City of London supported initiative ranking businesses according to the actions they are taking to attract and progress talent from all backgrounds.
22/06/17	Charity Finance Group/Association of Charitable Foundations	Seminar	Karen Atkinson	Cazenove Offices, City of London	Finance in grantmaking special interest group meeting 'paper-free grantmaking'.
22/06/17	Leathersellers Charity	Evening event	Chairman, Alison Gowman	Leathersellers' Hall	Evening to meet charities and funders
22/06/17	The Big Lottery Fund	Roundtable	Sufina Ahmad	Camden	Ideas lab hosted by Big Lottery Fund, aimed at organisations from London and the South East to discuss their collaborative funding offer
27/06/17	Charity Tax Group	Board meeting	Karen Atkinson	Westminster	Quarterly Board meeting

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28/06/17	Trust for London	Reception	Chairman, Alison Gowman, Jenny Field, David Farnsworth and Sufina Ahmad	Southwark	Summer evening reception to launch their strategy and celebrate their year.
28/06/17	Postal Museum	Opening	Chief Commoner Wendy Mead	Camden	Event to celebrate the opening of a new museum.
29/06/17	Hazelhurst Trust	Debate	Chairman, Alison Gowman & Cheryl Chapman	The Charterhouse	Debate on philanthropy featuring Dr David Starkey.
29/06/17	Stefanou Foundation	Reception	Tim Wilson	House of Lords	An event marking Stefanou's early intervention support to break the inter-generational cycle of child abuse.
29/06/17	Doteveryone	Breakfast	Jack Joslin	Somerset House	Tech for Good breakfast hosted by Comic Relief, Paul Hamlyn and Doteveryone looking at ways funders can support social tech initiatives.
29/06/17	East End Community Foundation	Breakfast	Chairman, Alison Gowman	Sky Garden, 20 Fenchurch Street	Event to learn how the foundation supports businesses to achieve their social responsibility goals.
30/06/17	London Borough of Culture	Launch	Jack Joslin	City Hall	Launch of the CBT funded scheme, attended by borough representatives. The Mayor of London Sadiq Kahn & Policy Chairman Catherine McGuinness were amongst the speakers.

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03/07/17	Collaborate CIC	Roundtable	Sufina Ahmad	Hackney	Roundtable to discuss research that funders have commissioned Collaborate to do on connecting communities and the implications of Brexit.
04/07/17	Association of Charitable Foundations	Seminar	Tim Wilson	Camden	A network meeting (which your officer facilitates) for Trusts and Foundations with an interest in monitoring and evaluation. This event looked at the use of data in decision-making
04/07/17	Mayor's Fund for London	Event	Deputy Chairman, Druv Patel	The LaLiT Hotel, Southwark	Event on the APPG report on hunger during school holidays. Attended by Sadiq Khan
05/07/17	Association of Charitable Foundations	Network Meeting	Shegufta Rahman	Camden	Violence Against Women and Girls Network Meeting to discuss the Lloyds Bank Foundation's Transform Programme, following two years of delivery.
06/07/17	Trust for London	Advisory Group	Ciaran Rafferty	Little Britain	A regular meeting of the advisory group for the Moving on Up project.
06/07/17	National Council for Voluntary Organisations	Seminar	Tim Wilson	Islington	A meeting for funders interested in making use of NCVO's voluntary sector almanac data.
06/07/17	Ealing CVS	Funder Advice Session	Sufina Ahmad & Olivia Dix	Ealing	Application support information session and an update on the strategy was provided to the 20 groups in attendance.



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10/07/17	New Local Government Network	Report launch	Chairman, Alison Gowman, Chief Commoner Wendy Mead, Jenny Field, David Farnsworth & Sufina Ahmad	Guildhall	Launch of Building Bridges report.
11/07/17	The Cultural Hub	Staff update Session	Sufina Ahmad	City of London	Staff session providing an update on the Cultural Hub from the various partners that are involved.
12/07/17	CIPFA (Chartered Institute of Public Finance and Accountancy)	Annual Conference	Sufina Ahmad	Manchester	Two day conference exploring the themes of people, place and prosperity, in the context of dividing communities, low productivity, health and social care and the UK economy.
12/07/17	London's Giving	Report launch	Chairman, Alison Gowman, Jenny Field & Cheryl Chapman	Macquarie Bank, Ropemaker Street, City of London	Launch of report A Place to Give and celebration of three years' progress and CBT funding for another three years till 2020.
12/07/17	London Councils	Grants Committee	Chairman, Alison Gowman	59 Southwark Street	Regular Grants Committee meeting.

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