



The City Bridge Trust Committee

Date: WEDNESDAY, 20 SEPTEMBER 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)

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Lunch will be served in the Guildhall Club at 1pm

John Barradell
Town Clerk and Chief Executive

AGENDA

Part 1 - Public Agenda

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**
To agree the minutes and non-public summary of the meeting held on 27 July 2017.
For Decision
(Pages 1 - 10)
4. **OUTSTANDING ACTIONS**
Report of the Town Clerk.
For Information
(Pages 11 - 12)
5. **PROGRESS REPORT**
Report of the Chief Grants Officer.
For Decision
(Pages 13 - 24)
6. **BRIDGE HOUSE ESTATES - DESIGNATION OF FUNDS**
Report of the Chief Grants Officer and the Chamberlain.
For Decision
(Pages 25 - 32)
7. **GRANT APPLICATIONS STATISTICAL REPORT**
To receive a report of the Chief Grants Officer.
For Decision
(Pages 33 - 40)
8. **GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS**
To consider the Chief Grants Officer's reports on grant recommendations as follows:-
For Decision
(Pages 41 - 42)
 - a) London Hub (Pages 43 - 50)
 - b) Strategic Initiative - Trust for London, Citizenship and Integration Initiative (Pages 51 - 56)
 - c) Strategic Initiative - London Emergencies Trust (Pages 57 - 60)
 - d) Chelsea Physic Garden Company (Pages 61 - 74)
 - e) Gendered Intelligence CIC (Pages 75 - 86)
 - f) National Society for the prevention of Cruelty to Children (Pages 87 - 98)

- g) Stop the Traffik (Pages 99 - 110)
- h) Marylebone Bangladesh Society Ltd (Pages 111 - 124)
- i) FoodCycle (Pages 125 - 136)
- j) Island Advice Centre (Pages 137 - 148)
- k) Legal Advice Centre (Pages 149 - 160)
- l) Sangam Association of Asian Women (Pages 161 - 172)
- m) Working Chance (Pages 173 - 184)
- n) LawWorks (Pages 185 - 196)
- o) Ethical Property Foundation (Pages 197 - 210)
- p) London Legal Support Trust (Pages 211 - 222)
- q) Project Oracle Evidence Hub (Pages 223 - 232)
- r) Small Charities Coalition (Pages 233 - 244)

9. **SUPPORT FOR YOUNG PEOPLE POST GRENFELL**
Report of the Chief Grants Officer.

For Decision
(Pages 245 - 248)

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

For Decision

- a) Grants Recommended for Rejection (Pages 249 - 254)
- b) Grants Approved under Delegated Authority (Pages 255 - 258)
- c) Withdrawn and Lapsed Applications (Pages 259 - 260)
- d) Variations to Grants (Pages 261 - 262)
- e) Events Attended (Pages 263 - 276)

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

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

13. **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

14. **NON-PUBLIC MINUTES**
To agree the non-public minutes of the meeting held on 27 July 2017.
For Decision
(Pages 277 - 278)
15. **BRIDGE TO WORK BURSARY SCHEME**
Report of the Chief Grants Officer.
For Decision
(Pages 279 - 282)
16. **PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS**
Report of the Chief Grants Officer.
For Information
(Pages 283 - 286)
17. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**
18. **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, 27 July 2017

Minutes of the meeting of the The City Bridge Trust Committee held at the Guildhall EC2 at 1.45 pm

Present

Members:

Alderman Alison Gowman (Chairman)	Deputy Edward Lord
Dhruv Patel (Deputy Chairman)	Jeremy Mayhew
Karina Dostalova	Wendy Mead (Chief Commoner)
Simon Duckworth	Paul Martinelli
Marianne Fredericks	Ian Seaton
Alderman Alastair King	Deputy Dr Giles Shilson
Vivienne Littlechild	

Officers:

Amanda Thompson	-	Town Clerk's Department
Karen Atkinson	-	Chamberlain's Department
Anne Pietsch	-	Comptroller and City Solicitor's Department
David Farnsworth	-	Chief Grants Officer
Sufina Ahmad	-	The City Bridge Trust
Sandra Davidson	-	The City Bridge Trust
Jenny Field	-	The City Bridge Trust
Martin Hall	-	The City Bridge Trust
Jack Joslin	-	The City Bridge Trust
Kate Moralee	-	The City Bridge Trust
Ciaran Rafferty	-	The City Bridge Trust
Shegufta Rahman	-	The City Bridge Trust
Tim Wilson	-	The City Bridge Trust
Kristina Drake	-	Communications Team
Stewart Goshawk	-	Seconded to the Wembley National Stadium Trust

1. APOLOGIES

Apologies were received from the Right Hon. the Lord Mayor Alderman Andrew Parmley and Deputy the Revd Stephen Haines.

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

The following non-pecuniary declarations were made during the meeting:

- Agenda item 8f) – Rushey Green Timebank - Deputy Edward Lord

- Agenda item 8h) – Park Theatre – Karina Dostalova

3. **MINUTES**

RESOLVED – That the public minutes and non-public summary of the meeting held on 15 June 2017 be agreed as an accurate record.

4. **OUTSTANDING ACTIONS**

RESOLVED – That the Outstanding Actions update be noted.

5. **PROGRESS REPORT**

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

London Metropolitan Archives and CBT's historic records

Members noted that the grant making arm of Bridge House Estates had been operational since 1995, making 7,676 awards with a total value of £370m. Detailed records were produced for each grant awarded, including not only what was provided to the Trust by way of application and subsequent monitoring, but also what was produced by officers following assessment and site visits.

Quite extensive records now existed 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 had no practical value for grant management purposes, and were now 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 contained a rich history of the capital's voluntary and community sector, and could be of significant interest to researchers.

Discussions were now underway with London Metropolitan Archives as to how this material might be preserved.

RESOLVED – That permission be given for LMA to have access to the City Bridge Trust records as part of the history of London's voluntary and community sector.

London's Giving

Members were reminded that at the March 2017 meeting the Trust 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 be filled through an open recruitment process.

Eight bids were received for the consultancy contract, four of which were shortlisted for interview. The successful applicants were Clare Thomas and

Deborah Xavier (who had undertaken the first phase of this project) together with Rocket Science.

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 was 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.

Human Resources Team Update

Head of Philanthropy Strategy: An appointment had been made subject to reference and an update would be provided to this Committee once confirmed.

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

Social Investment Fund Associate: Interviews had been held and an appointment made with the successful candidate due to start in August.

A Member requested that an updated Organisation/Staff Chart of the Trust be brought to the September Committee.

6. RISK REGISTER FOR BRIDGE HOUSE ESTATES (CHARITY NUMBER: 1035628)

Members received a report of the Chamberlain regarding the key risks register for Bridge House Estates (BHE). Three risks had been identified as relating to the services overseen by the City Bridge Trust Committee.

RESOLVED – That:

- a) It be confirmed that appropriate control measures are in place for the three risks currently on the register for the City Bridge Trust Committee; and
- b) It be confirmed that there are no other risks relating to the services overseen by the City Bridge Trust Committee which should be added to the Bridge House Estates risk register.

7. GRANT APPLICATIONS STATISTICAL REPORT

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.

RESOLVED – That the report be noted.

8. GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS

a) **Rushey Green Timebank for Lewisham Local**

AGREED - £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.

(NB Provided post meeting)

b) **John Lyon's Charity**

APPROVED* - £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 to be costed against the Anniversary Programme for infrastructure support.

*Subject to clarification of the figures given in the chart on page 39.

c) **Participatory City Foundation**

APPROVED - £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.

d) **All Hallows Bow**

APPROVED - £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.

e) **Islington Centre for Refugees and Migrants**

APPROVED - £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.

f) **Rushey Green Timebank**

Members questioned the fact that the application referred to year ending April 2015, but the assessment report covered the concurrent year's accounts from 15/16 to 18/19.

APPROVED – £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.

g) **Disability Sports Coach**

Members questioned the fact that the application referred to year ending April 2015, but the assessment report covered the concurrent year's accounts from 15/16 to 17/18 and the report did not clearly cover the links between the years. Added to this the numbers of participants responding to the survey following the programme seemed low. These matters were to be clarified to the satisfaction of the Chairman and Deputy Chairman between meetings.

APPROVED That delegated authority be given to the Chairman and Deputy Chairman to approve £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 subject to clarification of the financial information provided.

(NB Provided post meeting)

h) **Park Theatre**

APPROVED - £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.

i) **Stay Safe East**

APPROVED - £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.

j) **Arts 4 Dementia**

APPROVED - £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.

k) **Ashford Place**

APPROVED - £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.

l) **Bexley Crossroads Care Limited**

APPROVED - £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.

m) **Eritrean Community in the UK**

APPROVED - £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+.

n) **Queens Crescent Community Association**

APPROVED - £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.

o) **Plan Zheroes**

APPROVED - £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.

p) **Carney's Community**

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

q) **Synergy Theatre Project**

APPROVED - £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.

r) **Aston-Mansfield**

APPROVED - £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.

s) **Enfield Voluntary Action**

APPROVED - £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.

t) **Voluntary Action Islington Limited**

APPROVED - £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.

u) **Grants to Provide Summer Activities for Young People & Families in the Grenfell Tower Area**

The Committee received a report of the Chief Grants Officer outlining 18 organisations which had been approved for funding under delegated authority, to provide a summer programme of activities for young people and their families living in and around the Grenfell Tower area.

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

a) **Grants Recommended for Rejection**

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

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

b) **Grants Approved 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.

c) **Withdrawn and Lapsed Applications**

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

RESOLVED – That the report be noted.

d) **Variations to Grants**

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

RESOLVED – That the report be noted.

e) **Moving on Up Summary Findings**

The Committee received a report of the Chief Grants Officer which provided an evaluation summary of the Moving on Up project which was co-funded between CBT and Trust for London.

RESOLVED – That the report be noted.

f) **Communications & Events**

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

RESOLVED – That the report be noted.

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

There were no questions.

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

On behalf of the Committee the Chairman thanked all those who had been involved in responding to the recent fire at Grenfell Tower in the Royal Borough of Kensington and Chelsea including those officers whose work in the office was increased in order to cover the exceptional call on the time of the City Bridge Trust Officers.

The Chairman also thanked Sufina Ahmed who had led the Strategic Review with exceptional care and skill and had made a real difference to the approach and outcome of the Review.

12. **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.

13. **NON-PUBLIC MINUTES**

RESOLVED – That the non-public minutes of the meeting held on 15 June 2017 be agreed as an accurate record.

14. **EVALUATION OF THE ANCHOR PROJECT**

The Committee received and noted a report of the Chief Grants Officer in relation to Buttle UK, Anchor Project.

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**

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 the Grenfell Tower tragedy.

The meeting closed at 3.25 pm

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.	11 May 2017	Improvement of Grants Budget 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	September 2017	On track
2.	15 June 2017	Review of Terms of Reference	CBT Team and Town Clerk	January 2018	On track
3.		Human Resources Team Update A Member requested that an updated Organisation/Staff Chart of the Trust be brought to the September Committee.	CBT team	September 2017	

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Committee: City Bridge Trust	Dated: 20 th September 2017
Subject: Progress Report	Public
Report of: Chief Grants Officer	For Information

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 Implementation
- The Divide event at The Charterhouse
- Stepping Stones Fund
- Bridge to Work – official launch
- London Emergencies Trust
- Trusts and Foundations (GOLD Command).
- Members' away day
- Central Grants Programme
- Wembley National Stadium Trust
- Human Resources

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. Today's speakers are Caroline Fraser (Head of Grants and Projects) and Marne Beukes-Collins (Grants and Project Manager) from Landaid, the property industry charity. Landaid brokers free professional property advice for charities supporting children/disadvantaged young people enabling them to better manage, maintain and improve their premises and services. Your three year grant goes towards the costs of Landaid's Pro Bono Manager.
2. My Friday visits to funded organisations continue and provide such valuable insight into some of the extraordinary work you fund (as ever, you are very welcome to join me). Most recently Deputy Chairman Dhruv Patel and I visited

RaPT (The Rehabilitation for Addicted Prisoners Trust). Your grant supports a Recovery Support Worker at their Recovery Hub in London, providing support to recovering addicts upon their release from prison. We were impressed by the social enterprise café and the group support session we participated in.

Development of the Strategic Review Implementation Delivery Plan

3. A cross-team staff group has been established in order to develop the delivery plan for your Strategic Review 2018-2023, Bridging Divides and oversee its implementation. This 'core group' comprises Tim Wilson, Scott Nixon, Marek Habrda, Geraldine Page, Shegufta Rahman and Jenny Field. It has been kept deliberately small in the interests of efficiency. However, members of the whole staff team will be engaged with the implementation plan and will be assigned to specific tasks.
4. Regular updates will be provided to the Committee. In addition, a cross-departmental 'task and finish' group will be established to consider how the City of London Corporation can be the most effective trustee of Bridge House Estates, and to consider the ways in which its assets can be used to support CBT to implement its next strategy.
5. A tender for the Learning & Evaluation partner has been drawn up by Tim Wilson, in consultation with the Chairman and Deputy Chairman, the CBT staff team and other trusts and foundations. It is currently going through the City of London Corporation's procurement process.
6. By 'Funder Plus', we mean additional support that is offered to organisations funded by the Trust over and above cash grants, such as (but not exclusively) help with organisational development support; investment readiness support; governance support. A good example of this is your grant to the Cranfield Trust. You awarded a grant of £205,100 over 18 months in November 2016 to enable up to 95 CBT grantees to receive management consultancy support, plus access for all CBT grantees to its online human resources information and advice helpline. The implementation of the Strategic Review provides an opportunity to review CBT's current funder-plus offer and improve it.
7. One of our ambitions for 'Funder-Plus' is to draw on the considerable talent that lies within the City of London Corporation's workforce for the benefit of CBT funded organisations, as well as the sector more widely. Discussions have begun with Lloyds Bank Foundation which has developed an impressive, well-established model with its senior banking staff, in order to learn from its experience and to avoid re-inventing wheels.
8. It will be important that your revised Funder-Plus offer also complements your wider work supporting civil society infrastructure support in London, through the development of your Cornerstone Fund, the implementation of The Way Ahead and the establishment of the London Hub, as well as your current Strengthening the Voluntary Sector strand of your Investing in Londoners

programmes. (A report recommending funding to help establish the London Hub can be found elsewhere in your papers today).

9. An implementation plan and overview for the Bridging Divides Strategy can be found at Appendix 1.

The Divide event at The Charterhouse

10. On the evening of the 24th July 2017 a joint event with Trust for London was held at The Charterhouse (a recently refurbished historic building in the City for which you provided funding toward disability access works).
11. This event was an opportunity for both the Trust and Trust for London to thank those that have been involved in their respective Strategic Reviews and introduce their Funding Strategies for the next five years. The evening also included a screening of clips from The Divide, a documentary film highlighting social inequalities through the story of seven individuals in the UK and US. These clips were presented by the film's Director Katharine Round, and Executive Producer, Christopher Hird.
12. Following the screening, Chairman Alison Gowman chaired a panel discussion with the film-makers, along with your Chief Grants Officer & Bharat Meta, CEO of Trust for London. This was followed by a networking reception which allowed the discussion to continue.

Stepping Stones Fund

13. Representatives from City Bridge Trust and UBS met on 8th September to review funding proposals for the fourth round of the Stepping Stones Fund. This programme is a social investment readiness scheme designed to encourage more of London's charities and social enterprises to examine how repayable finance might support their work. This round received 56 initial applications with a total value of £2.5m. This was an equivalent number of applications to the previous round, but a slightly lower ask since we discontinued the high-value risk finance strand of this programme. Stepping Stones has a two-stage application process, and officers work to eliminate all applicants who are unlikely to receive a grant as soon as possible so they are saved the time of a detailed proposal which would ultimately result in a rejection. 25 applicants were shortlisted, three of whom withdrew before deadline. UBS generously offered these organisations technical support with their proposals, and there followed 22 panel interviews at the bank in late July.
14. We made 16 funding recommendations to the panel on 8th September at a total value of £617,000. This is higher than the original £550,000 allocation due to the write back and revocation of Stepping Stones grants awarded in previous rounds to Communities into Training and Employment and the Mayor's Fund for London. Feedback has been offered to all unsuccessful applicants (including those who were rejected at the first application stage), with the majority taking advantage of this opportunity. Awards in this round

covered a fascinating range of projects from up-cycling furniture, to the provision of discounted residential housing to a hospital admission avoidance programme for older people. Your meeting heard recently from the Bike Project, and we may invite another Stepping Stones grantee to speak to you about their work soon.

15. With comparable schemes such as Big Potential coming to an end, City Bridge Trust is in a unique position to support market readiness and we are likely to come to Committee with a proposal to run a further round in 2018.

Bridge to Work – official launch

16. I am very pleased to confirm that a date has been set for an event to mark the official launch of your £3.3m *Bridge to Work* programme – supporting disabled young Londoners into and in employment.
17. You agreed the overall objectives and principal components of this programme earlier this year; as well as funding to a number of specific charities, all of which have recently started their projects. One element – a bursary scheme to support paid internships/work experience – was awaiting confirmation of how it would be delivered but, as a report elsewhere in these papers will highlight, this is now close to completion.
18. The launch will be held on Thursday 19th October between 12 noon and 1.30pm. Thanks to our consultant project manager, James Lee, we have been given permission to hold the event in the State Rooms of The Speaker's House in Westminster. The Speaker is expected to be present for part of the event.
19. It is our intention to focus invitations on the business sector, to encourage their involvement in *Bridge to Work* and to inform them of the support available to them as potential and actual employers. The bursary element – which will be of particular interest to them – will be officially announced on the day.

London Emergencies Trust (LET)

20. LET continues to operate for the Grenfell Tower disaster on the basis of up to 100 deceased and so far from the £4.8m they have received for distribution £2m has been paid out with the remainder earmarked for payment to cases they expect to emerge over the next weeks and months.
21. LET is currently in discussion with the British Red Cross with regards to taking on future distribution of funds they have raised via the London Fire Relief Fund.
22. Payments also continue to be made to those affected by the three terrorist incidents in London (Westminster, Finsbury Park and London Bridge). The first two named are all but complete, with victims from the London Bridge attack continuing to come forward.

23. Julia Mirkin (Grants Officer) continues to be seconded to the LET, with Stewart Goshawk providing support. These arrangements are subject to regular review.

Trusts and Foundations update (GOLD Command).

24. Grenfell GOLD Command has been working closely with the Royal Borough of Kensington and Chelsea over the past few months to agree which services will transition back to the local authority for on-going management. The work strand that coordinates the work of the various trusts and foundations will continue to be overseen by the Chief Grants Officer until 2018 to ensure consistency of approach and to ensure that the necessary expertise and experience is in place.

Members' away day

25. This is a reminder that the CBT Committee Members' half day away (morning) will be taking place on 31st October 2017, which will be followed by a buffet lunch. This away day will focus on the implementation of the 'Bridging Divides' strategy, the agenda for which will be issued closer to the time. It would be very much appreciated if Members of this Committee could ensure that this date and time is held in their diary.

Central Grants Programme (CGP)

26. In order to increase the strategic impact of grant-making across the City of London Corporation, ensure that the grants are managed more efficiently and effectively, improve the consistency and quality of the customer experience the CGP was set up to manage all grant applications, monitoring and evaluation processes and Committee reporting procedures.
27. It was agreed that the CGU would be co-located within CBT in order to facilitate consistency of approach and harmonise service standards. The Chief Grants Officer, whose responsibility includes the grant-making activities of CBT, maintains an overview of the CGU, with relevant input from the Head of Charity and Social Investment Finance within the Chamberlain's Department.
28. As the CGP was established as a 2 year pilot project, it was agreed that an evaluation of the pilot programme would be undertaken. Rocket Science has now been commissioned by the Central Grants Unit to deliver the independent evaluation. The report recommendations will be submitted to the Finance Grants Oversight and Performance Sub-Committee in October 2017 to inform decisions on the future approach and then submitted to Resource Allocation Sub-Committee and Policy and Resources Committee for approval in December 2017. This committee will be kept up to date as there are implications on the CBT operation.

Wembley National Stadium Trust

29. The Wembley National Stadium Trust (WNST) is currently seeking tenders for the provision of its grants management, administration and support services for a period of four years, starting on 1 April 2018, with the provision for an annual review. This exercise is in no way indicative of the WNST trustees view of CBT's performance in managing their affairs – simply that for due diligence purposes, they deem it appropriate (and we agree) to assure themselves that they are getting value for money. CBT is free to submit a tender to continue providing the service.

30. The closing date for tenders to be submitted to ACF (which is acting as the WNST agent for the tender exercise) is 5pm on Friday 6 October 2017. The successful and any unsuccessful tenderers will be formally notified in writing within two weeks of the WNST AGM on 14 November 2017.

Human Resources

31. At the July Committee, Members requested that a current CBT staff organogram be provided for their information. This is appended as Appendix 2 to this report. Points to note:

- Hannah Davey, Social Investment Fund Associate is now in post
- Lily Brandhorst, Grants Administrator, is now in post
- Nadia Large, the CBT Apprentice is now in post.
- Fiona Rawes, The Head of Philanthropy Strategy will be in post as of mid October 2017.

Appendices:

Appendix 1: Implementation plan and overview for Bridging Divides Strategy

Appendix 2: CBT Staff organogram

Appendix 1: Implementation Plan and Overview for Bridging Divides Strategy

	Detail of work to be undertaken	Lead Officer	Expected Completion date	Status (RAG)
Implementation plan	CBT Committee to receive an update on the delivery plan and progress to date.	Jenny Field	September 2017	Green
Resourcing	To recruit a project manager to support the implementation of Bridging Divides.	Jenny Field	August 2017	Completed
	To develop a resourcing plan for the implementation of Bridging Divides strategy ensuring adequate backfill.	Jenny Field	October 2017	Green
Budget planning	To prepare the first draft of the 2018/2019 budget	Karen Atkinson	October 2017	Green
	To request CBT Committee approval of the 2018/2019 budget.	Karen Atkinson	November 2017	Green
Learning and Evaluation	To develop a comprehensive brief for the commissioning of a Bridging Divides Learning partner.	Tim Wilson	September 2017	Green
	Procurement to evaluate and approve the brief for circulation to interested parties.	Tim Wilson	September 2017	Green

Appendix 1: Implementation Plan and Overview for Bridging Divides Strategy

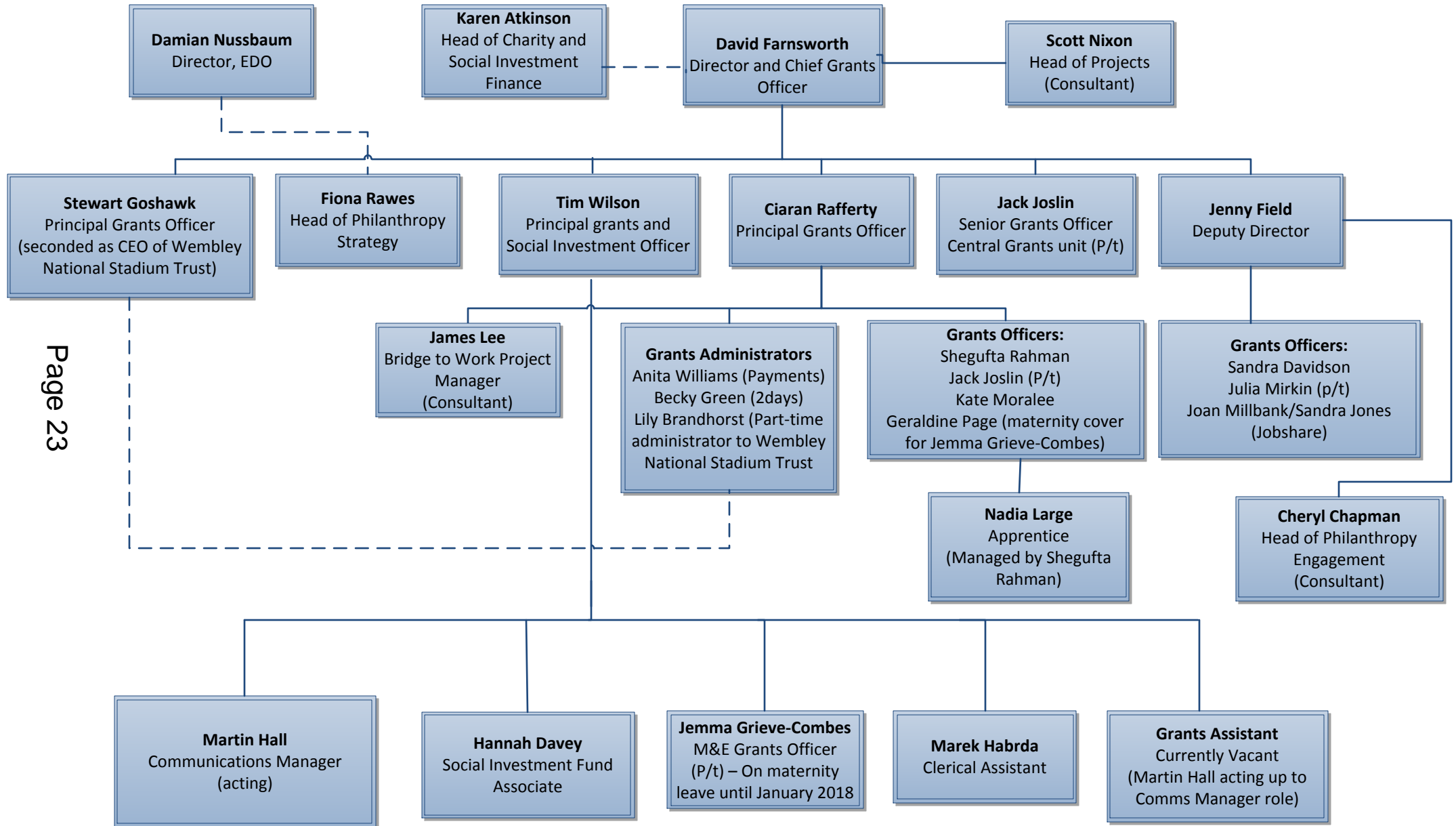
	Detail of work to be undertaken	Lead Officer	Expected Completion date	Status (RAG)
	To undertake a review of all Monitoring and Evaluation polices and procedures.	Tim Wilson/Gemma Grieve-Combes	January/February 2018	Green
Process and systems review	To undertake a systematic review of all application processes and information requested at application stage through the Task and Finish group.	Ciaran Rafferty	September – January 2018	Green
	To implement all actions arising from the processes review.	Ciaran Rafferty	February 2018	Green
Communications	Communications plan to be developed for launch of Bridging Divides strategy at CBT Chairman's dinner.	Martin Hall/Kristina Drake	September	Green
	CBT website to be updated with the new funding programme information.		February–March 2018.	
CRM systems	Feasibility study underway with the IT department to identify the most appropriate software package to replace the existing	Tim Wilson	September 2017	Green

Appendix 1: Implementation Plan and Overview for Bridging Divides Strategy

	Detail of work to be undertaken	Lead Officer	Expected Completion date	Status (RAG)
	grants management software (GIFTS).			
Funder plus offer	To commence discussions with other London Funders to discuss collaborative approach to Funder plus provision.	Jenny Field/Tim Wilson	October	Green
CoLC Implementation group	To hold the inaugural meeting of the CoLC implementation group	David Farnsworth	TBD	Amber
CBT Committee Member engagement	To provide updates on implementation at every CBT Committee meeting	Jenny Field	Next update November 2017	Green
	To provide an implementation update at the Members away day in October.	Jenny Field	October 2017	Green
BHE Governance	To monitor implementation progress through dedicated fortnightly Strategic Review Implementation Coordination group meetings.	Jenny Field	Fortnightly meetings – on-going.	Green

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City Bridge Trust – September 2017



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Committee:	Dated:
City Bridge Trust Committee Resource Allocation (Policy and Resources) Sub – Committee Policy & Resources Committee	20 th September 2017 19 th October 2017 19 th October 2017
Subject: Bridge House Estates – Designation of Funds for <i>Bridging Divides</i> , City Bridge Trust Grants Programme 2018-2023	Public
Report of: Chief Grants Officer & The Chamberlain	For Decision

Summary

The City of London Corporation is the corporate trustee of Bridge House Estates (1035628), one of the largest charities in England and Wales and, through the activities of the charity’s grant giving arm, City Bridge Trust (CBT), is now London’s largest independent grant-maker. CBT has been increasing the strategic approach to its grant making, including more long-term, proactive grants developed in partnership with experts and based on evidence of need. With this change comes an increasing scrutiny and further impetus to exemplify good governance within the charity sector.

As part of the implementation of CBT’s new five year funding strategy *Bridging Divides*, which informs the grant expenditure for 2018 - 2023, consideration is being given as to how the City Corporation’s internal governance arrangements might be improved to better support the delivery of high impact, longer-term charitable grant-making over a five year grant programme and therefore the effective operation of the charity consistent with the City Corporation’s duties as trustee.

This report recommends that the City Corporation, consistent with its trustee duties to be transparent in the effective management of the charity’s funds in achieving its purposes for the public benefit, formally establishes a further designated fund out of the unrestricted funds of the charity from the income surplus to that required for the maintenance and support of the five bridges. It is recommended that the designation be for a five year period for the purposes of the new *Bridging Divides* grants programme 2018-2023, thereby properly reflecting the charity’s existing commitment to a five-year strategy to deliver these activities (adopted by the Court of Common Council on 20th July 2017) which, under current corporate governance arrangements, is reliant upon annual budget allocation decisions which create a ‘false barrier’ to the management of funds available for grant-making.

Recommendations

Members are asked to:

- a) Recommend to the Court of Common Council that a designated fund be established for Bridge House Estates (1035628) out of the charity’s unrestricted funds and from the income surplus to that required to maintain and support the

bridges for the purposes of the five-year 'Bridging Divides' grants programme 2018-2023; and

b) Delegate authority to the Chamberlain in consultation with Chairman and Deputy Chairman of the City Bridge Trust Committee, to agree the amounts to be held within this designated fund.

Background

1. Bridge House Estates (1035628) (BHE, the charity) is the seventh largest charity in England and Wales, established for the purposes of the maintenance and support of London Bridge. It is now responsible for five bridges. It is an ancient charity and the City of London Corporation is the sole corporate trustee having had stewardship of the charity for some 800 years. The charity is administered in accordance with its various governing documents and the City's corporate governance framework.
2. In 1995 as the charity's income had exceeded that required for the bridges and was accumulating, consistent with the City's duties as trustee, a cy-près Scheme was sought from the Charity Commission to amend the charitable trusts to allow the charity's funds to be applied for other charitable purposes. Since the Scheme was made, it has been the City Corporation's practice to settle policies which provide for grant-making to address identified needs in London. These activities of the charity are undertaken by City Bridge Trust (CBT), the charitable funding arm of BHE. A policy, approved by the Court of Common Council and based on consultation and evidence of need, sets out the spending parameters of this charitable funding.
3. As London's largest independent grant-maker, CBT works to ensure it has the most impact with the funds available. Over recent years CBT has moved to a more strategic approach to grant-making, reflecting changes to charitable needs in London over the last 25 years. Longer grants (of up to 5 years, and exceptionally 10 years) have been agreed and the proportion of the grants budget available for 'proactive' grant-making has also increased – i.e. grants worked up with invited partners to target specific issues within the agreed policy.
4. The City Corporation has recently, at the Court of Common Council on 20 July 2017, settled the new policy to guide the application of the charity's income surplus to that required to maintain and support the bridges for a five year period (2018 – 2023): *Bridging Divides*. The strategy's mission is to reduce inequality and grow more cohesive communities for a London that serves everyone. This will be achieved by using all of our knowledge, networks and assets to champion London's biggest asset – its people. The full version of the strategy is available on the CBT website www.citybridgetrust.org.uk.
5. At their June 2017 RASC Away Day, Members indicated their support for allocating the expected future BHE surplus income to CBT grant giving, with the proviso that the funds would be directed to charitable objectives decided on by Court of Common Council in line with BHE objectives and the Quinquennial review of CBT. Current forecasts from the medium term

financial plan for BHE suggest that this allocation of income to grant-making would provide an additional £13.9m over a 2-year period from 2019/20, with the potential of further funds in future years.

6. In 2015, the Court of Common Council agreed an uplift to the CBT core grants budget (known as 'Anniversary funding'), totalling £12m, with £9.6m to be applied to specific programmes on employability and infrastructure support, split over 3 budget years. In each successive year, CBT was required, under the City Corporation's corporate governance framework, to formally request approval of a 'carry-forward' of these funds to continue these programmes where current and prior-year funding had not been committed in-year. As of September 2017, it is expected that £1.59m of this total amount will be committed in 2018/19, being the final grant awards within the Infrastructure Support programme.
7. Indicative funding for the next 5 year period is as per Table 1.

Table 1: CBT Funding 2018/19 – 2022/23

	2018/19	2019/20	2020/21	2021/22	2022/23	Total
Bridging Divides	20,000,000	20,000,000	20,000,000	20,000,000	20,000,000	100,000,000
The Prince's Trust *	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	5,000,000
Anniversary funding: Infrastructure Support	1,590,000					1,590,000
Indicative additional funding**		6,900,000	7,000,000			13,900,000
	22,590,000	27,900,000	28,000,000	21,000,000	21,000,000	120,490,000

*The Princes' Trust funding is for 10 years, and commenced in financial year 14/15

** Per RASC AwayDay July 2017

Current position

8. The current budgeting process for CBT grant-funding allocates an agreed amount to a specific financial year. If the amount set-aside is not fully utilised in-year, a further decision is required under the City Corporations' financial management framework (carry-forward process) for the remaining balance to be made available for the following year. Should an overspend occur, this would be deducted from the subsequent years' resource allocation. Decisions on carry-forwards are usually made in July of each year; hence requests under urgency procedures have been made in the past to enable grant programmes to take place in a timely manner.
9. The utilisation of the carry-forward process from a charity perspective has led to various internal issues in the efficient and effective administration of the charity's grant-making activities:
 - a. Difficulties in making plans ahead of the relevant funding year, as technically CBT do not have future funding available;
 - b. Upfront analysis by the CBT team to inform plans, involving external experts, collaboration and feedback from Members takes time to undertake. Whilst this activity takes place, an impression is given that CBT is under-spending as the year one allocation of a programme is not being spent;

- c. Where 'big impact' programmes are being developed, CBT can only confirm funds with potential partners that relate to in-year budgets, and previously agreed carry-forward amounts. This leads to the team delaying plans until the full amount of funding is available – as happened with the majority of the 2015 anniversary funding;
 - d. Grants worthy of funding will not be brought to the March CBT Committee for approval, as these may push the total approved above available annualised funding for that year so creating a reported 'overspend'. Financial year-end becomes an artificial barrier, preventing CBT from supporting potentially life-changing projects, which can often be time critical.
10. A carry-forward process for grant-making is not a familiar concept within the charity sector. Inefficiencies have arisen where officers and Members look to balance an annual grants budget within a five-year strategy, deciding which applications to hold back from approval. This has caused concerns with potential grantees, where the processes can be seen as unhelpful, effectively 'shutting the door' at financial year-end and preventing the charity's funds from being applied to the intended purposes because of management processes adopted by the trustee. Larger charitable foundations tend to work over longer time horizons (as CBT has been seeking to do in recent years), with designations being a useful enabling tool. Use of such tools exemplifies good governance, so also building and protecting the reputation of the charity. CBT need to have the confidence to discuss plans with certainty, in order to move forward their vision for London to be a city where all individuals and communities can thrive.
11. Financial Regulations, as approved by the Court of Common Council, deal with budget management and carry-forward arrangements. These expressly provide that the Deputy Chamberlain be consulted on all matters of interpretation of the Regulations, with the Deputy Chamberlain's decision as to their meaning and application being final, providing such decision does not have the effect of altering the meaning of a standing order, other regulation or other contract approved by a Committee or the Court of Common Council (Part 2, paragraph 1.1).
12. Per Standing Order 48, the Court of Common Council has agreed that budget allocation decisions for BHE, as for other funds, are reserved to Policy and Resources Committee, following consideration by the Policy and Resources Resource Allocation Sub-Committee.

Proposal for a change in treatment of uncommitted grant funding

13. Up to 2015/16, CBT focussed on shorter term grant funding. Grants approved covered a 1-3 year funding timeframe, with pre-award discussions taking place over several months. With increased strategic focus and the provision of an increasing grants budget, CBT is now in a position to fund higher value programmes that will have significant reach and impact over a longer time period. The agreed programmes require investment in upfront analysis by the CBT Team, with this spread over a longer period than that relating to the previous funding model.

14. The trustees of a charity may choose to set aside, or ring-fence, part of their unrestricted funds to be used for a particular future project. By earmarking funds in this way, the trustees set up a designated fund that remains part of the unrestricted funds of the charity. Designations have an administrative purpose only, and do not legally restrict the trustees' discretion in how to apply the unrestricted funds that they have previously earmarked. If circumstances or plans change, the designation may be changed or removed, with funds returned to the general income fund for future determination of use. This would enable the City as trustee of BHE to react, should future investment performance reverse recent gains experienced.
15. Transparency around designated funds is a helpful tool when explaining a charity's reserve policy and the level of reserves held, and is consistent with the City's duties as trustee to demonstrate accountability in the proper management of the charity's funds in accordance with established charity accounting practice. Disclosure of designated funds within the Trustee's Annual Report depicts future commitments that a charity intends to make, clearly telling the story about future plans and demonstrating good stewardship.
16. BHE currently holds £741.2m as designated funds. With total unrestricted funds as at 31 March 2017 being £1,341.3m, this represents 55.3% of total funds held. The highest value designated fund is the property revaluation fund, at £568.8m, representing unrealised gains made on investment properties held which only become available for other purposes should properties be sold. Six other designated funds cover on-going projects such as bridge repairs and property dilapidations, alongside the £20m set aside for the Social Investment Fund. Despite grant-making representing the most significant area of expenditure for BHE, there is no designation for future grant expenditure at present. Commitments made as a result of a grant-making policy which operates over a five year period would normally be reflected as a designation in a charity's accounts.

17. Table 2 – Bridge House Estates: Funds held as at 31/03/17

Bridge House Estates	
Funds held as at 31/03/17	£m
Designated Funds:	
Property Revaluation	568.8
Bridges Repairs	147.8
Social Investment Fund	20.0
Property Sales Pool	1.9
Property Dilapidations	1.5
Tower Bridge Tourism	1.0
Finsbury House	0.2
Total designated funds	741.2
General Fund	612.0
Pension Reserve	(11.9)
Total unrestricted funds	1,341.3

18. A designated fund set-up specifically for the grant-making funds provided to CBT by the Trustee for their approved funding strategy would enable plans to be confidently developed ahead of commitments being made, alongside seamless continuation of agreed programmes once partners have been selected. In practice, CBT would continue to work to an approved annual budget/forecast, however would be able to make decisions relating to approved programmes that cross over financial year-ends agreeing needs with The Chamberlain as necessary under his delegated authority.
19. Such a designation would allow the CBT team to apply improved operational management to year-end processes, in the best interests of the grantees that the charity supports, rather than by the requirement to follow internal accounting carry-forward processes. As noted in paragraph 18, an approved annual budget/forecast would continue to apply, however the CBT Committee would have the ability to approve time-critical grants to charities ahead of the financial year-end. Such approvals would utilise in advance the grants budget set aside for the following financial year, held within the core grants designated fund.
20. Controls would be put in place to ensure that grant commitments approved come within the available designated amounts within each fund. The creation of grants-related designated funds is not about increasing reserves, but about providing greater flexibility in the timing of decision-making and the adoption of procedures which support the effective administration of the charity consistent with the City Corporation's duties as trustee. Routine reporting to CBT Committee would include balances in designated funds, with this also provided to Chamberlains to enable forecasts to be updated.

21. As the awarding of a grant does not usually result in an immediate outflow of cash, the flexibility that use of a designated fund will bring will not have an immediate adverse impact on treasury management.

Conclusion

22. To enable seamless continuation of long-term grant giving programmes, the creation of a designated fund for the new *Bridging Divides* strategy will more effectively support the activities of the charity, allowing improved decision-making processes. Such a designation supports good governance of the charity, demonstrating management of reserves held.
23. Delegating authority to the Chamberlain, in consultation with the Chairman and Deputy Chairman of the CBT Committee, to agree the annual amounts to be held within the designated fund will enable the charity to be reactive to the needs of its beneficiaries.

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Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Grant Applications – statistical summary	Public
Report of: Chief Grants Officer	For Information

Summary

This paper summarises applications received and action taken under your grants programmes this financial year, including those recommended for decision to this meeting. 60 applications will be dealt with at today’s meeting, including 18 grant recommendations and 25 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 (the remaining 16 applications were either withdrawn or are recommended for rejection). This leaves £7,799,211 remaining on your core budget for 2017/18; £1,463,000 remaining on the Anniversary funds; and £1m to be committed to the Prince’s Trust.

Recommendations

Members are asked to:

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

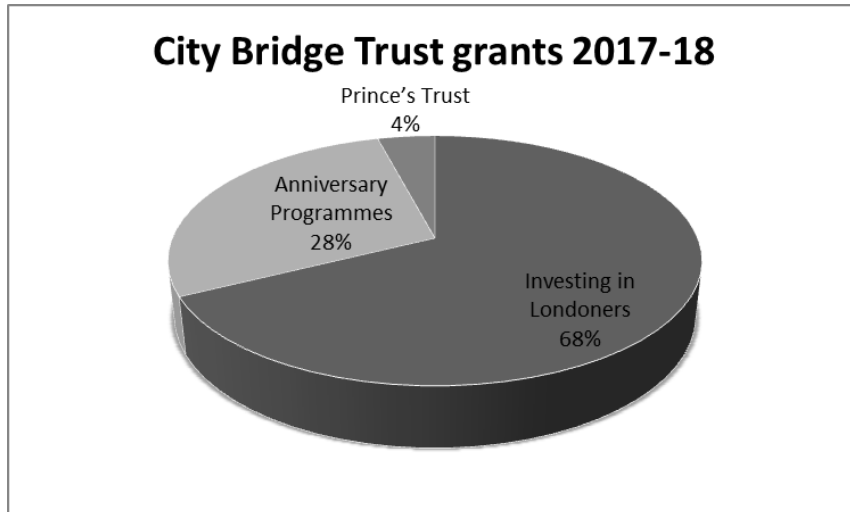
Main Report

Background

1. This paper summarises action taken and proposed this financial year on grant applications received under the Trust’s three current grant-making streams for 2017-18:

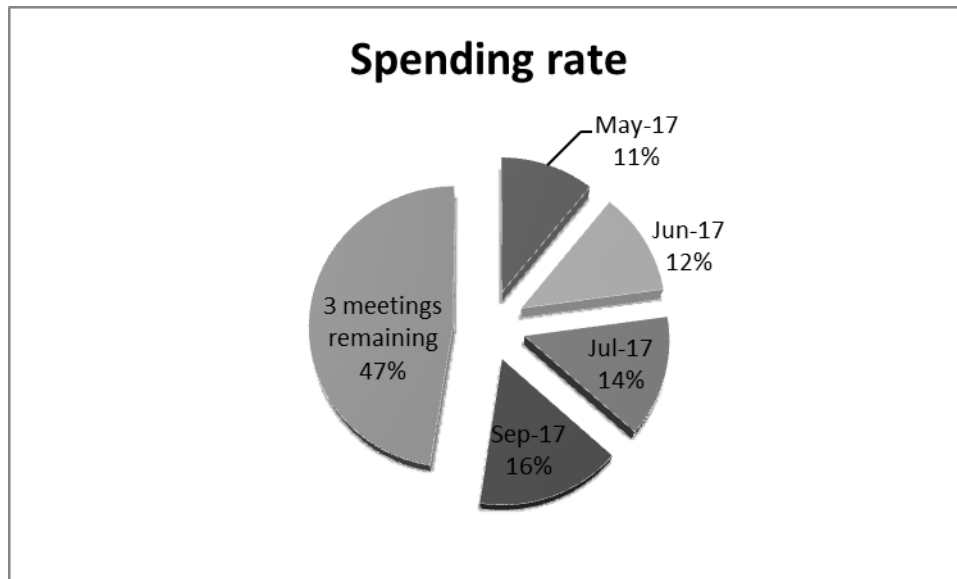
	Total Budget
Investing in Londoners	£16,422,520
Anniversary Programmes*	£6,858,000
Prince’s Trust	£1,000,000
	£24,280,520

*Of the original grants budget available for your Anniversary programmes, £1,590,000 for infrastructure support is now forecast to be committed in 2018/19.



Core Investing in Londoners Grants Budget 2017/18

- In the first three meetings of 2017/18 the Trust committed 37% of its core budget for Investing in Londoners. Today's meeting proposes a further 16% commitment (43 applications for a total recommended sum of £2,613,829). If approved, this will leave a balance of 47% of the annual budget:



- With four meetings remaining this will require an average spend rate of 16% per meeting, an increase in the average to date. The Trust is comfortable it can achieve this with the team currently in place.
- Table 1 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.

Table 1: Overall spend against 2017/18 budget

	Grants budget	Grants spend	Pending applications	% spend of annual budget
Core 2017/18 Investing in Londoners grants budget				
Original Grants Budget	£15,000,000			
20th anniversary budget uplift	£1,000,000			
Write-Backs & Revocations	£98,520			
UBS contribution	£50,000			
Carry forward 2016/17	£274,000			
Total Budget Available	£16,422,520			
Previous Committee meetings				
May 2017+		£1,773,300		11%
June 2017		£1,965,850		12%
July 2017		£2,270,330		14%
Sub-total approved spend		£6,009,480		37%
Remaining budget	£10,413,040			
Today's recommendations				
September 2017 - recommended grant spend		£2,582,217		16%
September 2017 - recommended non-grant spend*		£31,612		0%
Total spend recommended today		£2,613,829		16%
Total annual spend		£8,623,309		53%
Remaining budget	£7,799,211			47%
Summary				
Grants committed		£6,009,480		37%
Spend recommended		£2,613,829		16%
Balance remaining	£7,799,211			47%

*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

+£108,000 of this is the budget that has been allocated to Strategic Review spend, c/f from 2016/17

5. The Trust is currently assessing Investing in Londoners applications, Stepping Stones requests and Strategic Initiatives at a total value of just under £5.6million.

Proposed use of remaining budget				
Submitted applications - under assessment			£4,710,593	28%
Stepping Stones			£612,000	4%
Strategic initiatives			£164,960	1%
Exceptional grants - under assessment			£100,000	1%
Available grants balance			£2,211,658	13%
Total			£7,799,211	

6. Investing in Londoners has several strands and more detail is provided on spend per strand in appendix A.
7. In addition to the core Investing in Londoners budget, the Trust also manages 20th Anniversary funding carried forward since 2015-16 which is designated for use towards employability and infrastructure programmes. Additional budget was agreed for both programmes for 2017/18.

8. Funds under the employability programme have now been fully committed with no balance remaining:

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

9. Your meeting today will consider 1 application of £350,000 under your Infrastructure Support Anniversary programme. This leaves a balance of £1,463,000 (equivalent to 69% of the programme) which the Trust expects to commit before the end of the current financial year:

Anniversary programme: infrastructure support (20th anniversary budget uplift of 40%)				
	Budget	Spend	Pending applications	% spend of annual budget
Carry forward from previous years	£1,713,000			
2017/18 budget	£2,000,000			
2018/19 forecast commitment	(1,590,000)			
Total budget available	£2,123,000			
Spend at previous meetings in 2017/18		£310,000		15%
Recommended grant spend today		£350,000		16%
Recommended non-grant spend today*		£0		
Total spend		£660,000		31%
Remaining budget	£1,463,000			69%
Summary				
Spend committed		£310,000		15%
Spend recommended		£350,000		16%
Balance remaining	£1,463,000			69%

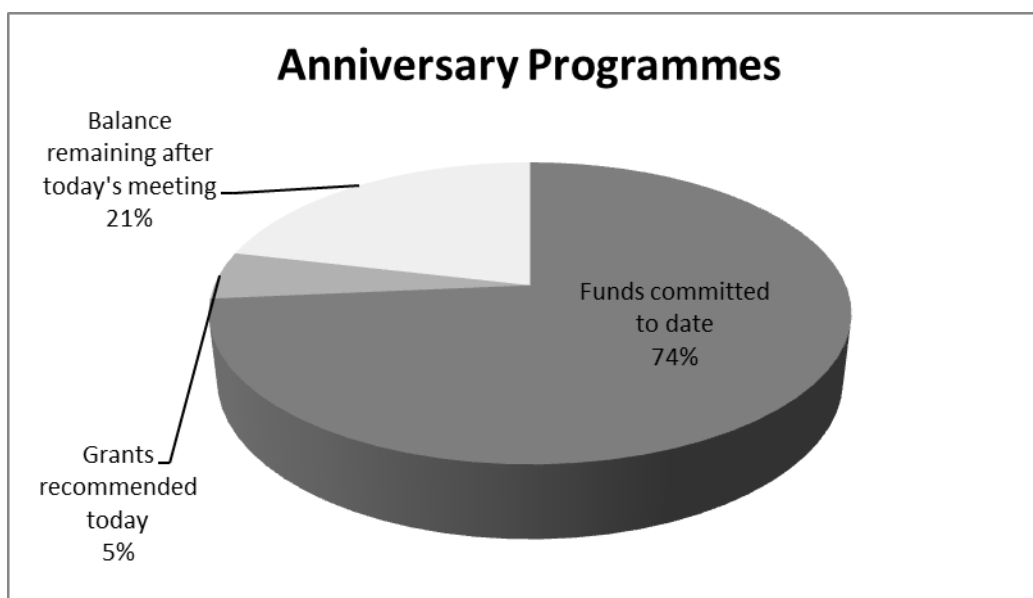
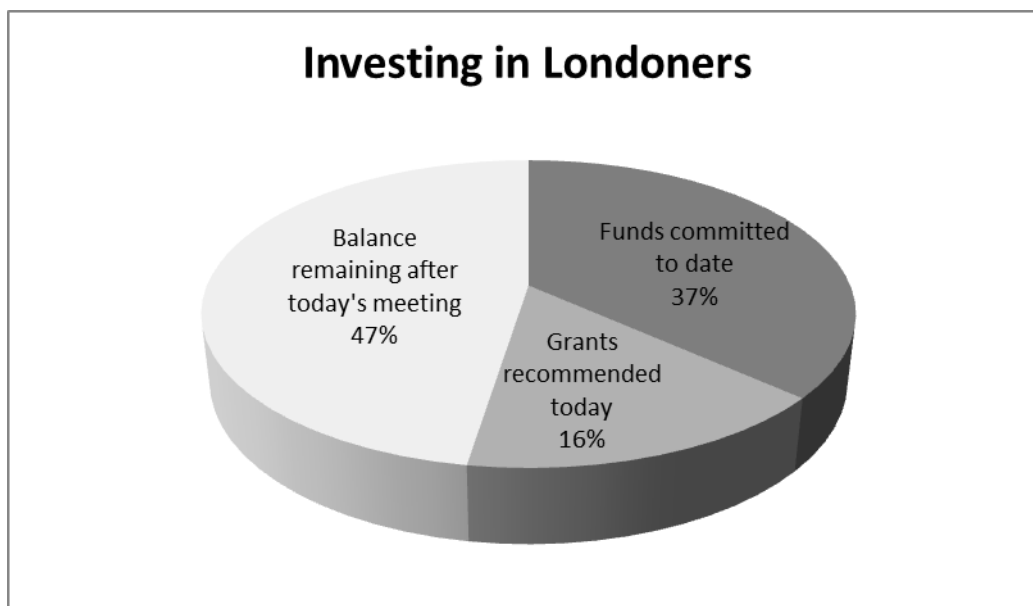
*This represents expenditure such as management costs, evaluation activity or related research that is recommend for approval but will not be awarded as a grant to another charity

10. Finally, the Trust has managed an annual grant award of £1,000,000 to The Prince's Trust since 2014. The 2017-18 sum will be drawn down in March 2018 (in line with previous years):

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

11. Spending progress against the 2017-18 grant allocation can be summarised thus:

	2017-18 allocation	Funds committed to date	Funds recommended today	Balance remaining
Investing in Londoners	£16,422,520	£6,009,480	£2,613,829	£7,799,211
Anniversary Programmes	£6,858,000	£5,045,000	£350,000	£1,463,000
Prince's Trust	£1,000,000	£0	£0	£1,000,000
	£24,280,520	£11,054,480	£2,963,829	£10,262,211



David Farnsworth
 Chief Grants Officer
 T. 020 7332 3710 E. david.farnsworth@cityoflondon.gov.uk

Appendix A – Detailed breakdown of Investing in Londoners’ spend for 2017-18

Table 1 shows the grant awards you have made this financial year under Investing in Londoners and today’s recommendations by programme.¹

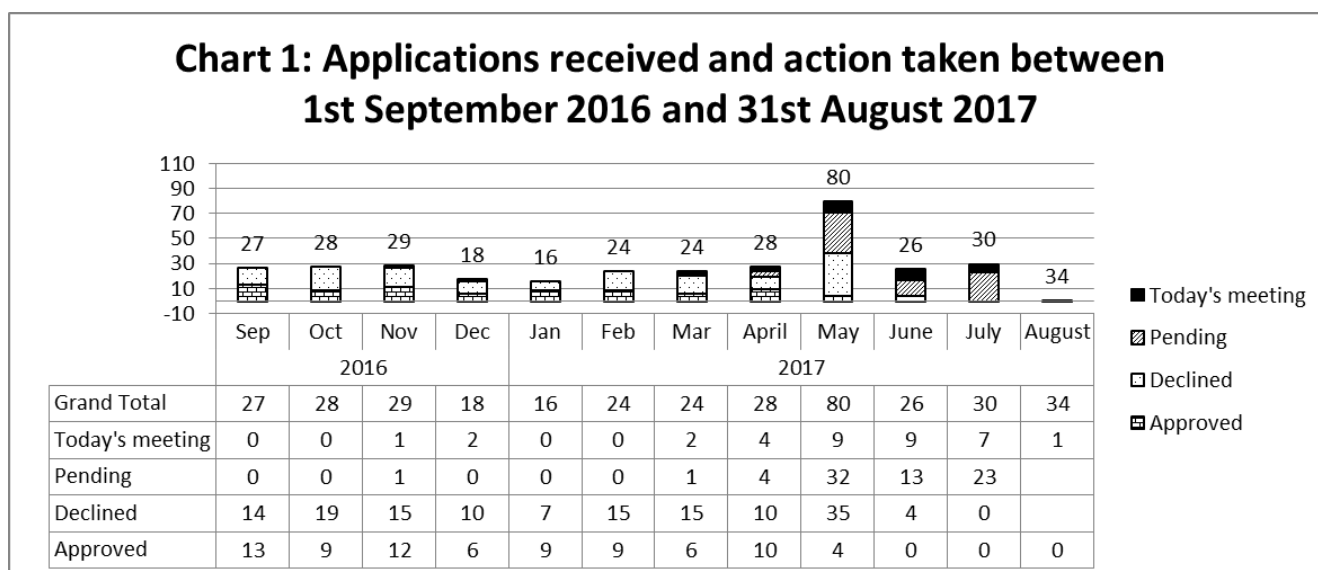
Table 1: Investing in Londoners awards and recommendations by programme

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	2	1	3	3%	£196,800	£2,500	£199,300	2%
Improving Londoners' Mental Health	4	1	5	5%	£286,950	£125,100	£412,050	5%
Improving London's Environment	3	2	5	5%	£298,000	£134,600	£432,600	5%
Making London More Inclusive	8	0	8	8%	£990,900	£0	£990,900	11%
Making London Safer	4	2	6	6%	£403,100	£368,400	£771,500	9%
Older Londoners	9	2	11	11%	£908,600	£156,000	£1,064,600	12%
Reducing Poverty	5	4	9	9%	£499,240	£550,700	£1,049,940	12%
Resettlement & Rehabilitation of Offenders	3	1	4	4%	£253,300	£117,000	£370,300	4%
Stepping Stones	0	0	0	0%	£0	£0	£0	0%
Strengthening London's Voluntary Sector	5	6	11	11%	£524,500	£807,644	£1,332,144	15%
Strategic Initiatives	7	4	11	11%	£1,523,060	£105,433	£1,628,493	19%
Eco-audits	4	0	4	4%	£10,200	£0	£10,200	0%
Access Audits	2	0	2	2%	£1,830	£0	£1,830	0%
Exceptional Grants	0	20	20	20%	£0	£214,840	£214,840	2%
Non grant spend	N/A	N/A	N/A	N/A	£113,000	£31,612	£144,612	2%
Grand total	56	43	99	100%	£6,009,480	£2,613,829	£8,623,309	100%

The 19% 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 closely monitored.

¹ Making London More Inclusive excludes access audits which are shown separately.

1. 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.



2. Between 1st September 2016 and 31st August 2017, 364 applications were received for the Investing in Londoners programmes. Excluding the applications being considered at this meeting, 78 applications have been approved, 144 declined and 74 are pending. The spike in applications seen in May 2017 are due to the closing date for a round of the Stepping Stones Fund. Otherwise applications are fairly evenly spread across the year, which is comparable to previous years.
3. There are 6 applications shown as pending and which were received prior to and including April. One of these – for £2,000 - is due for approval under delegated authority before this meeting. Recommendations on the others have been delayed whilst awaiting information from the applicants.
4. Officers are asking you to consider 60 applications at this meeting, as presented in the subsequent annexes and reports. Of these, 19 are recommended for a grant and 25 are reported as having been approved under the scheme of delegations (these include the formal inclusion of the summer activity grants for Grenfell which were tabled at your last meeting). A further 11 are recommended for rejection, and 5 applications have been withdrawn by applicants. Table 2 provides a summary.

Table 2: Action to be taken on applications today**Investing in Londoners**

Action to be taken	Number	Amount
Applications recommended for grant to Committee	18	£2,356,200
Funding approved by delegated authority up to £10,000 (to note)	23	£127,717
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)	2	£98,300
Applications recommended for rejection	11	n/a
Withdrawn applications (to note)	5	n/a
Applications lapsed (to note)	0	n/a
Total Investing in Londoners applications	59	£2,582,217
Non grant spend approved by delegated authority *	N/A	£31,612
Total Investing in Londoners spend	59	£2,613,829

* This formed a part of the Lord Mayor's Show delegated authority which consisted of 3 grants, and 1 non grant amount.

Anniversary Programme: Infrastructure Recommended for grant to today's Committee	1	£350,000
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Grants in Management

5. The total of grants currently under the on-going management of your Grants Officers is shown in Table 3. Prior to the approvals recommended for this Committee, the total sum for grants currently being managed is £31,019,015. Should the Committee approve the applications proposed at today's meeting, this balance will rise to £33,982,844.

Table 3**Grant commitments under management as at 31st August 2017**

Table for 2017/18 year-to-date	£	£
Prior year grant commitments brought-forward as at 31 March 2017		27,600,000
Grant awarded in 2017/18	11,054,480	
Grant write-backs in 2017/18	<u>(98,520)</u>	
		10,955,960
Payments made in 2017/18 to Grantees		(7,536,945)
Current grant commitments as at 31st August 2017		<u>31,019,015</u>

INDEX OF GRANT RECOMMENDATIONS

Ref No.	Organisation	Requested Amount	Recommended Amount
<u>Anniversary Programme: Infrastructure Support</u>			
a)	14255 Greater London Volunteering	£350,000	£350,000
	<i>Anniversary Programme: Infrastructure Support Total</i>	£350,000	£350,000
	Grand Total for Anniversary Programme	£350,000	£350,000
<u>Investing in Londoners</u>			
<u>Strategic Initiatives</u>			
b)	14256 Trust for London	£100,000	£100,000
	<i>Total Strategic Initiatives</i>	£100,000	£100,000
<u>Exceptional Grants</u>			
c)	14266 London Emergencies Trust	£50,000	£50,000
	<i>Total Exceptional Grants</i>	£50,000	£50,000
<u>Improving London's Environment</u>			
d)	14045 Chelsea Physic Garden Company	£86,337	£86,300
	<i>Total Improving London's Environment</i>	£86,337	£86,300
<u>Improving Londoners' Mental Health</u>			
e)	14015 Gendered Intelligence CIC	£125,052	£125,100
	<i>Total Improving Londoners' Mental Health</i>	£125,052	£125,100
<u>Making London Safer</u>			
f)	14172 National Society for the Prevention of Cruelty to Children	£272,400	£270,000
g)	13862 Stop the Traffik	£167,485	£98,400
	<i>Total Making London Safer</i>	£439,885	£368,400
<u>Older Londoners</u>			
h)	14185 Age UK Ealing (AUKE)	£93,002	£90,000
i)	14122 Marylebone Bangladesh Society Ltd	£70,000	£66,000
	<i>Total Older Londoners</i>	£163,002	£156,000

	Ref No.	Organisation	Requested Amount	Recommended Amount
<u>Reducing Poverty</u>				
j)	14141	FoodCycle	£87,500	£87,000
k)	14133	Island Advice Centre	£148,085	£148,000
l)	13994	Legal Advice Centre (University House)	£128,724	£132,900
m)	14154	Sangam Association of Asian Women	£173,697	£182,800
<i>Total Reducing Poverty</i>			£538,006	£550,700
<u>Resettlement and Rehabilitation of Offenders</u>				
n)	14011	Working Chance	£157,958	£117,000
<i>Total Resettlement and Rehabilitation of Offenders</i>			£157,958	£117,000
<u>Strengthening London's Voluntary Sector</u>				
o)	14118	Ethical Property Foundation	£134,000	£150,000
p)	14123	LawWorks	£111,285	£162,700
q)	14136	London Legal Support Trust	£300,000	£300,000
r)	14000	Project Oracle Evidence Hub	£90,000	£90,000
s)	14143	Small Charities Coalition	£100,164	£100,000
<i>Total Strengthening London's Voluntary Sector</i>			£735,449	£802,700
Grand Total for Investing in Londoners			£2,395,689	£2,356,200

Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: London Hub – in line with the recommendations of The Way Ahead (Ref: 14255)	Public
Report of: Chief Grants Officer	For Decision

Summary

Building on your commitment to strengthen the voluntary and community sector in London, and, in particular, building on your involvement with the delivery of The Way Ahead, this report seeks your approval to establish the London Hub, with Greater London Volunteering acting as the vehicle for this new body.

Recommendation

Members are asked to agree a grant of £350,000 to secure the first year of operation of the London Hub, to be costed from your Anniversary Programme for infrastructure support. The grant to be conditional on Greater London Volunteering's new governing document being in place.

Main Report

Background

1. At your last meeting, you received an update on developments regarding your involvement in the future of infrastructure support for London's voluntary sector, in particular, your engagement with The Way Ahead and development of the Cornerstone Fund.

2. Underpinning your commitment to voluntary sector infrastructure support is the recognition that a vibrant and healthy voluntary sector plays a vital role in sustaining strong communities. Civil society infrastructure support, in turn, plays a vital role in creating and sustaining a healthy and vibrant voluntary sector. By 'civil society infrastructure support' we mean the provision of access to appropriate business, technical and enterprise support, as well as a 'voice' within the ongoing debate about London, its governance and the issues it faces.

3. You may recall that the starting point for this work was research you funded, commissioned through your grantee London Funders (the membership network for funders and investors of civil society in London), into the future of infrastructure support for London's voluntary sector. The resulting report, *The Way Ahead*, was launched in April 2016 at Guildhall.

4. Following the launch, a 'Systems Change' group was established with representation from public, private and voluntary sectors, to take the report's recommendations forward.
5. London Voluntary Services Council (LVSC: the umbrella body for the councils of voluntary service network) and Greater London Volunteering (GLV: which co-ordinates local volunteer centres) were tasked with establishing the London Hub to replace the functions of these two organisations, as well as taking forward the wider ambitions of The Way Ahead report, with GLV widening its objectives in order to be the vehicle for the new body.
6. The proposal before you is from GLV and funds are requested to secure the first year of operation of the London Hub.

Establishment of the London Hub

7. In October 2016, you approved a grant of £23,600 to enable GLV and LVSC to work together to establish the London Hub. As a result, the initial work has been done on due diligence, TUPE and the preparatory work on the new governing document for the organisation. In addition, you approved a grant of £48,400 in March 2017 in order to support GLV's involvement with The Way Ahead, as part of the cohort of 15 organisations funded under your Bridge Fund which you established to support eligible infrastructure organisations in the year after the withdrawal of London Councils funding.
8. GLV is in the process of widening its objects to enable it to take on the wider functions of the London Hub. It is recommended therefore that any grant is conditional on the new governing documents being in place.
9. In addition, GLV and LVSC have consulted widely with stakeholders in order to shape the London Hub. This work was further informed by five task and finish groups that were established to make recommendations (now published) on the following topics:
 - Co-production
 - Triage and connect
 - Voice and campaigning
 - Data
 - Consistent commissioning
10. The proposal is to create an agile and responsive organisation with a focus on four key themes, with suggested topics sitting under each themes, as follows:
 - **Promoting Positive Change**
 - Voice for civil society
 - Convening partnerships
 - Building cross-sector links
 - Showcasing impact
 - Making the case for investment

- Bidding vehicle¹
- **Unleashing Potential**
 - Brand for the sector
 - Leadership development
 - Inter-agency consultancy
 - Asset-based resourcing
 - Innovations and development
 - Bidding vehicle
- **Improving Support Systems**
 - Co-ordinating skill-based volunteering
 - Shared resources
 - Website/portal
 - Peer-based quality (training and upskilling; sharing what works)
- **Real-time Intelligence**
 - Policy and voice (campaign for change)
 - Outcomes and impact framework
 - Networks (to feed data)
 - Data
 - Showcasing and sharing what works

Governance of the London Hub

11. In the spirit of The Way Ahead's ambition to put Londoners at the heart of everything, membership will be open to any individual or organisation based in London (from community activists to businesses interested in civil society and statutory bodies, as well as voluntary and community groups). How this translates into the governance of the charity is yet to be decided, as the right balance needs to be struck between having an engaged membership and ensuring that decision-making is not limited by this (e.g. if the quorum for an AGM became difficult to achieve due to a high level of voting members).
12. To ensure the London Hub's trustee board is manageable, it is proposed that the Board comprise a minimum of five and a maximum of ten people, elected by the members. It is proposed that the Board select the Chair (as is the case with NCVO, for example) to enable a skilled and/or high profile person to be appointed. An AGM will be held within 18 months of the new organisation structure being established.

Staffing of the London Hub

13. It is proposed that the London Hub has a staff team of five:
 - Chief Executive to lead the organisation and to lead on the 'Promoting Positive Change' objective as well as the policy and voice strand of the 'Real-time Intelligence' objective.

¹ Some functions run across the four themes (e.g. being a bidding vehicle; sharing what works)

- Organisational Support Officer (to provide administration, finance communications, governance and systems support to the organisation).
- Networks & Development Co-ordinator to lead on the 'Improving Support Systems' objective.
- Intelligence Co-ordinator to lead on the 'Real-time Intelligence' objective.
- Programmes Manager to lead the 'Unleashing Potential' objective.

14. The aim is to keep the staff team relatively small with some of the Hub functions being delivered within voluntary organisations using the Hub's brand and reach, rather than seeking to grow the Hub itself as an organisation.

15. It is not envisaged that the entire team would be in place on day one. The work will need to be phased to ensure that the organisation is fully operational by April 2018. This means that whilst the budget provided is for a fully staffed organisation and the request is for funding for the first year of the London Hub's operation, if funding is approved as requested, the spend of the grant is likely to be over a slightly longer period than 12 months. This means that the grant payments will be scheduled to reflect the level of staffing in place.

London Hub Budget

16. A full budget for GLV/London Hub for the period 1st October 2017 – 30th September 2018 (GLV's current financial year) is provided at Appendix A. Below is a summary:

Expenditure	
Salaries (incl. NI and 5% pension)	235,529
Volunteer expenses	1,000
Training and development	5,000
Travel and subsistence	2,500
Payroll fees	1,200
Office rental, telephone, Insurance, IT, stationery etc	29,961
Governance	17,560
Networks and meetings	7,500
Sub-total	300,250
Set-up costs	
Consultancy support	6,000
Professional fees - legal/financial	7,000
Brand development	5,000
Website development	12,000
Print/design - stationery/materials	2,750
Computers and equipment	6,500
Office equipment and furniture	3,000
Recruitment costs	4,500
Engagement and launch events	3,000
Sub-total of set-up costs	49,750
TOTAL	350,000

17. In addition to the expenditure set out above, GLV has applied to Sport England, under its Opportunity Fund, for a grant of £75,000 a year for two

years. It is a partnership bid led by GLV, that includes Team London, Sported and the local Volunteer Centres for Tower Hamlets, Greenwich, Southwark and Lewisham, linked to the "Big Half" half marathon that London Marathon will be starting in these boroughs from next March.

18. That application is still under consideration and expenditure relating to this bid is not included in the above budget therefore.

Finance

19. The deficit incurred in 2015-16 was planned. In 2013-14, GLV was awarded a contract which included a generous management fee, thereby boosting its free reserves well above the target level. The income and expenditure budget for 2017-18 includes the £350,000 requested to establish the London Hub as well as the £75,000 bid under consideration for 2017/18 by Sport England referred to in paragraph 16. This is why the proportion of confirmed income appears low. It should be noted that if funding from Sport England is not secured, expenditure in the year will reduce accordingly. The estimated cost of raising funds for 2017/18 may appear relatively high, given that such a high proportion of income in that year has been requested from CBT. The estimate is based on 50% of the Programme Manager's salary who will be expected to develop programmes that are income-generating and on the expectation that this post will become self-financing in the longer term.

Year end as at 31 March	2016	2017	2018
	Audited/Examined		
	Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	65,748	113,676	456,146
- % of Income confirmed as at 28/02/2017	n/a	100.00%	5%
Expenditure	(95,853)	(113,578)	(449,488)
Total surplus/(deficit)	(30,105)	98	6,658
Split between:			
- Restricted surplus/(deficit)	n/a	0	(292)
- Unrestricted surplus/(deficit)	(30,105)	98	6,950
	(30,105)	98	6,658
Cost of Raising Funds	2,206	5,729	25,000
- % of income	3.4%	5.0%	5.5%
Total expenditure	95,853	113,578	449,488
Free unrestricted reserves:			
Free unrestricted reserves held at year end	32,765	32,863	39,813
No of months of total expenditure	4.1	3.5	1.1
Reserves policy target	23,963	28,395	112,372
No of months of total expenditure	3.0	3.0	3.0
Free reserves over/(under) target	8,802	4,468	(72,559)

Conclusion

20. Establishment of the London Hub is an essential element of the successful implementation of The Way Ahead and in developing the parameters and governance of the Cornerstone Fund.
21. The current Chief Executive of GLV has recently been appointed as the new Director of London Funders and is due to take up post mid-September. In the interim, the trustees of GLV have recruited a part-time Chief Executive to provide continuity with regard to GLV's core work, together with a part-time London Hub Officer to continue its establishment. If funding is secured today, recruitment for a Chief Executive of the London Hub will commence and once an appointment is made, will replace these two part-time appointments.
22. If funding as requested is approved today, part of the role of the new Chief Executive will be to seek funding from other sources for future years, in order to ensure the London Hub is not overly dependent of City Bridge Trust.

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Appendix A

London Hub Budget

Expenditure - operational		
People:		
Chief Executive	70,153	<i>£60k salary plus employer NI and 5% pension</i>
Programme Manager	52,333	<i>£45k salary plus employer NI and 5% pension</i>
Net & Dev Coordinator	40,453	<i>£35k salary plus employer NI and 5% pension</i>
Intelligence Coordinator	40,453	<i>£35k salary plus employer NI and 5% pension</i>
Organisational Support	32,137	<i>£28k salary plus employer NI and 5% pension</i>
Volunteer expenses	1,000	
Training and development	5,000	
Travel and subsistence	2,500	
Payroll fees	1,200	
Office:		
Desk costs	21,461	
Insurance	1,200	
Telephone	2,400	
IT support	2,400	
Stationery and post	2,500	
Governance:		
Audit fees	4,000	
Accountancy support	2,310	
AGM/Annual report	1,000	
Trustee expenses	250	
Consultancy/legal	10,000	
Delivery:		
Networks and meetings	7,500	
Sub-total: operational	300,250	
Expenditure - set-up		
Consultancy support	6,000	
Professional fees - legal/financial	7,000	
Brand development	5,000	
Website development	12,000	
Print/design - stationery/materials	2,750	
Computers and equipment	6,500	
Office equipment and furniture	3,000	
Recruitment costs	4,500	
Engagement and launch events	3,000	
Sub-total: set-up	49,750	
TOTAL	350,000	

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Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Strategic Initiative - Trust for London, Citizenship and Integration Initiative (ref 14256)	Public
Report of: Chief Grants Officer	For Decision

Summary

Two independent charitable funders, The Trust for London and Unbound Philanthropy have set up, in partnership, a Citizenship and Integration Initiative with the aim of ensuring that Londoners of all backgrounds have meaningful opportunities to participate in the life of the city and decisions that affect them. In particular it is focusing on: civic engagement, encouraging the take up of citizenship and increasing voter registration; young Londoners, supporting young Londoners to secure their legal rights to residence and diversity, social contact and identity celebrating diversity and building shared identity. The initiative is working closely with the Mayor of London and the GLA's new Social Integration Unit and the initiative has seconded four people into the Unit as part of its work. The total cost of the initiative is £641,754 from initial planning in October 2016 to March 2019. Trust for London anticipates that, subject to the results of the evaluation, the initiative will continue beyond early 2019, but no funding has yet been identified for this.

Recommendation

Members are asked to:

- Agree a grant of £100,000 (payable over 15 months) to Trust for London towards the overall costs of the Citizenship and Integration Initiative. As the longer term impact and outcomes framework has not been finalised, release of the third quarterly payment is contingent on receiving and agreeing this framework.

Main Report

Background

1. London has a rapidly growing and changing population and significant population turnover. In 2014 roughly 50% of the 400,000 people moving to London were from abroad and an estimated 500,000 young Londoners will turn 18 during the current mayoral term. 54% of Londoners born abroad do not hold a British passport and the one million EU citizens who live in the UK face uncertainty about their immigration status post Brexit. Social integration, defined for this purpose as integration of minority groups including ethnic minorities, foreigners and refugees and under-privileged members of society into its mainstream, is important for the health of any city and is supported both by independent funders and the Greater London Authority (GLA). The

GLA's Social Integration Strategy will be launched in the autumn and will include indicators and metrics. The Citizenship and Integration Initiative (CII) was informed by the think-tank British Future's report *Making Citizenship Matter* (February 2016). <http://www.britishfuture.org/publication/making-citizenship-matter/> which argued that London has 'particular potential to be a pioneer in deepening a mainstream model of integration, one which understands that integration is a challenge for everybody in the city to get right and not an issue that is solely or primarily about how migrant citizens or minority communities navigate their way into the city's public life' and by similar successful initiatives in the USA.

Project details

- The Initiative has two phases. The first is to fund secondments with relevant skills and experience from civil society organisations into the GLA's new Social Integration team. Secondees from Migrants Organise, Citizens UK, Coram Children's Legal Centre and Just for Kids Law were funded in March 2017. The secondees have been working on practical project ideas for the GLA and then the CII will launch a call for proposals for community-based projects that will support the implementation of the secondees' ideas over and above the investment the GLA will be making. The CII has appointed a learning partner to undertake a formative evaluation of this model of close working between civil society and a city-wide statutory authority.
- The overall costings and timeframe for the scheme are set out below. (Since this table was formulated the timeframe has moved slightly and is now set to run through to March 2019.)

BUDGET Y1&2	2016	2017				2018				TOTAL budget
	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	
	budget	budget	budget	budget	budget	budget	budget	budget	budget	
Income										
Unbound Philanthropy	220,000									220,000
Trust for London	110,000									110,000
City Bridge Trust			150,000							150,000
Paul Hamlyn Foundation		100,000								100,000
Other tbc				65,000						65,000
Total income	330,000	100,000	150,000	65,000	0	0	0	0	0	645,000
Cumulative Income	330,000	430,000	580,000	645,000	645,000	645,000	645,000	645,000	645,000	
Expenditure										
Secondment 1A - MO		28,364				30,000				58,364
Secondment 1B - CUK		28,500				25,000				53,500
Secondment 2A - CLC		31,730				30,000				61,730
Secondment 2B - JFKL		23,160				23,000				46,160
Secondment 3 - tbc				28,000		56,000				84,000
Project 1				25,000		50,000				75,000
Project 2				25,000		50,000				75,000
Project 3						50,000				50,000
Learning & Evaluation - external			40,000				40,000			80,000
Learning & Evaluation - internal					10,000				10,000	20,000
Co-ordinator Costs	3,000	3,750	3,750	3,750	3,750	3,750	3,750	3,750	3,750	33,000
Other Costs					2,500				2,500	5,000
Total Expenditure	3,000	115,504	43,750	81,750	16,250	317,750	43,750	3,750	16,250	641,754
Cumulative Expenditure	3,000	118,504	162,254	244,004	260,254	578,004	621,754	625,504	641,754	
SURPLUS/DEFICIT										3,246

Proposed outcomes.

4. These relate at present to the success of the collaborative approach since projects that will be generated by this partnership have yet to be identified. During year one, the Learning Partner will support the development of a Theory of Change and a longer term impact framework, and outcomes will be reviewed and refocused. To date the proposed outcomes are:
- i. Better policy and practice to support citizenship and integration within regional government as a result of embedding civil society expertise in their strategic and practical delivery
 - ii. Better policy and practice to support citizenship and integration for civil society organisations as a result of developing strategy and projects in alignment with regional government activity
 - iii. Positive change for the systems, capacity, networks and confidence of the seconding organisation and increased knowledge, skills and expertise for the civil society secondees
 - iv. Added value for the investment of independent funders as a result of working in partnership across sectors, changes to future collaborative practice.

Financial observations

5. Audited accounts for the year ended 31st December 2016 show a strong balance sheet with total group funds of £319,030,880. After expenditure, the charity incurred a net operating loss of £6,675,039 which, after net gains and losses on investments and revaluation of the Trust's fixed assets, generated a surplus of £21,148,523 as shown below.
6. It is the Trust's policy not to maintain any unrestricted reserves as ongoing working capital is available from the endowment under the total return policy adopted. A small proportion of the grant budget is permitted to be carried over the year end, if unspent at the year end. The 2017 forecast does not show gains on investments as these are not predicted in advance. However Trustees are confident enough in the investment income to allow for a further £2m spend on grants in 2017 and 2018.

Year end as at 31 December	2016 Audited Accounts	2017 Budget
Income & expenditure:		
Income	8,483,398	15,191,000
Expenditure	(15,158,437)	(16,821,000)
Total surplus/(deficit)	(6,675,039)	(1,247,000)
Net gain on investments	27,596,462	0
Other gains	227,100	0
Total surplus/deficit	21,148,523	(1,247,000)
Cost of Raising Funds	1,309,643 (15.4%)	1,404,750 (9.2%)
Net assets held	319,030,880	317,783,880

Conclusion

7. This is an excellent opportunity to work collaboratively on an innovative approach to a pressing issue that brings together the different skills and perspectives of funders, the GLA and local civil society organisations. The evaluation through the Learning Partner has the potential to draw out models of working that could be replicated in other urban areas.

Summary of recommendation

Members are asked to:

- Agree a grant of £100,000 (payable over 15 months) to Trust for London towards the costs of the Citizenship and Integration Initiative. As the longer term impact and outcomes framework has not been finalised, release of the third quarterly payment is contingent on receiving and agreeing this framework.

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Summary Assessment of Strategic Initiative for Committee Decision

FILTERS	
<i>Will The pro-active grant:</i>	
Further the Trust's Vision and Mission (a fairer London & tackling disadvantage)?	Yes
Support work within one of existing Investing in Londoners programmes (liL)?	Yes
Or, meet a clear need that has arisen since(liL) were agreed?	N/A
Have the potential for impact beyond that of an individual reactive grant or number of individual grants?	Yes
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?	Yes
Be made to an organisation(s) that conforms to the Trust's eligibility criteria and has the capacity and expertise to deliver the work?	Yes

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

Is the work sustainable beyond the period of the grant?	Yes
Can the impact of the work be measured through evaluation?	Yes

Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Strategic Initiative – London Emergencies Trust	
Report of: Deputy Chief Grants Officer	For Decision

Summary

This report seeks your approval to support additional running costs of London Emergencies Trust, in order for it to be able to respond sensitively and effectively to the victims of recent tragic events in London.

Recommendations

Members are asked to agree:

- a) A grant of £50,000 towards the running costs of London Emergencies Trust between September 2017 and March 2018.
- b) The continued secondment of one 0.8 FTE CBT staff member to London Emergencies Trust, possibly until 31st March 2018.

Main Report

Background

1. You may recall that the London Emergencies Trust (LET) was established in March 2016, as the notional successor body to the London Bombings Relief Charitable Fund (LBRCF), to consider at times of national emergency whether there is need for a disaster fund, to provide financial support to those affected by any incident. The board of LET includes a number of leading professionals who were trustees of LBRCF, together with the directors of City Bridge Trust and Trust for London – and receives advice from former LBRCF personnel (including a CBT member of staff, Stewart Goshawk), London Funders, the British Red Cross and Farrer & Co.
2. LET is the authorised distributor of funds collected by the British Red Cross and others for the bereaved and hospitalised survivors of the three recent terrorist attacks (Westminster, London Bridge and Finsbury Park) as well as for the Grenfell Tower disaster. It is recognised by the Mayor of London, the Metropolitan Police, DCMS and other key institutions as the point of authority for the establishment and delivery (or otherwise) of any major disaster fund.
3. In March 2017, you approved a grant of £75,000 towards a fund for the bereaved families and injured survivors of the Westminster terror attack and to provide LET with working funds to meet other outgoings. When that funding was approved, of course, it could not have been foreseen that further calls would be made on it in response to the ensuing tragic events.

4. You received an update on the work of LET at your July Committee meeting. An additional paper was also tabled in the non-public session of that meeting setting out the various responses that are being made by the funding community to the four tragic events in London, and to highlight the actual and/or potential resource implications for the Trust.

Current Position

5. When you approved the previous grant of £75,000, it was envisaged that up to £50,000 would be used to directly benefit the bereaved and injured survivors of the Palace of Westminster incident with the balance being used towards general running costs, including company secretarial and other administrative functions. It was also noted that in order to enable LET to remain an operational charity, it would need a modest level of “working” funds should it ever need to be activated again.
6. In the early days, LET drew heavily on the expertise of Stewart Goshawk with the consent of the trustees of Wembley National Stadium Trust (WNST) where he is currently seconded as Chief Executive.
7. Following the London Bridge terrorist attack, your Grants Officer Julia Mirkin was seconded to LET on a part-time basis. However, following the Grenfell Tower tragedy, all of her time (0.8 FTE) is currently given over to LET. This is likely to continue until at least the end of the calendar year and possibly until March 2018.
8. A Director for LET was appointed following the Grenfell Tower tragedy, Rob Bell, formerly Deputy Director of the Paul Hamlyn Foundation, and currently a freelance consultant; as well as an Office Manager to implement administrative systems. Both these posts are being supported from funds approved towards LET’s operating costs. This means that the £25,000 of your original grant of £75,000 has been utilised in full towards operating costs (with the remaining £50,000 having directly benefitted those who were bereaved or injured).
9. In addition to the pro bono staffing support provided by CBT and WNST, LET has been in receipt of free office accommodation through CAN Mezzanine at Old Street, although it does have to meet the normal day to day costs of running an office.
10. All those involved have been working at more than maximum capacity to deal with claims in as speedy but sensitive way as possible and with minimal intrusion, against a backdrop of close and sometimes hostile media attention.
11. To date, LET has received a little over £5.6m for distribution, as follows:
 - Grenfell - £4.8m
 - Westminster – £200,000
 - London Bridge - £492,000
 - Finsbury Park - £110,000

The future

12. Planning for the future of LET is a complex matter because there are a number of unknowns. Its Director has provided a new budget to cover the period to March 2018 which tries to properly establish the systems, protocols, business continuity provisions and relationships to allow LET to respond effectively to growing need as well as to be able to scale down again yet scale up again if needed.

13. LET is due to distribute a further £3m on behalf of the British Red Cross and other fundraising organisations. It may then be required to distribute funds not yet spent early in 2018 or distribute new funds, such as those raised by the various giving platforms.

14. To this end, LET wishes to appoint an additional FTE caseworker and a full-time Administrative Assistant. This would grow the staff team as follows:

Director FTE (existing post)
 Office Manager 0.8 FTE (existing post)
 Admin Assistant FTE (new proposed post)
 Casework Manager 0.8FTE (CBT secondment)
 Casework Manager FTE (new proposed post)
 Casework Manager 0.5 FTE (CBT/WNST secondment)

LET Budget 1st September 2017 – 31st March 2018

London Emergencies Trust Running Costs Income 01/09/2017 – 31/03/2018		
Source	Amount	Comments
Paul Hamlyn Foundation	20,000	For Office Manager
British Red Cross	35,000	for core costs
Trust for London	20,000	TBC
In-kind support		Office free rental to 31st March 2018
		Free photocopier rental to 31st March 2018
		Two PCs donated
Total	75,000	
London Emergencies Trust Running Costs Expenditure 01/09/2017 – 31/03/2018		
Description	Amount	Comments
Office running costs	9,885	
Case management software	5,000	
Evaluation	10,000	
Legal & statutory	10,000	
Communications	7,000	
Staffing	134,000	5.3 FTE including on-costs
Total	175,885	

15. This means that LET faces a shortfall of £105,885. CBT is asked to contribute £50,000 towards this shortfall whilst LET is approaching other

funderson for the remaining shortfall. The shortfall would be partially mitigated if the current 0.8FTE secondment from CBT continues. At the point of writing this report, it is not clear how long this arrangement needs to continue. It is recommended therefore that you agree the continued secondment of one 0.8 FTE from the staff team, possibly until 31st March 2018. The value of this in-kind support is £35,000.

Conclusion

16. The establishment of LET has benefited greatly from CBT's involvement with its 'predecessor', the London Bombings Relief Charitable Fund (LBRCF) and the consequent knowledge and experience brought by CBT staff and the former CBT Chief grants Officer, now a LET trustee.
17. Since its inception, but in particular following events in June, it has had to deal with a great many unknowns, making forward planning very difficult.
18. Staff currently on secondment from CBT and WNST have gained considerable experience with LET and LET is very grateful for their input. It would probably be the preference of LET to continue to benefit from that experience rather than to try and train new staff from a 'cold start'. The casework, in particular following the Grenfell Tower tragedy, is extremely complex and needs to be handled with extreme care, understanding of the facts of the case, as well as sensitivity and compassion.
19. A grant as requested would provide the charity with a degree of certainty and assist it with forward-planning and is recommended. The continued secondment of CBT staff would provide welcome continuity and is also recommended.

Jenny Field

Deputy Chief Grants Officer

T: 020 7332 3715

E: Jenny.Field@cityoflondon.gov.uk

MEETING: 20/09/2017

Ref: 14045

ASSESSMENT CATEGORY - Improving London's Environment

Chelsea Physic Garden Company

Adv: Sandra Davidson

Amount requested: £86,337

Base: Kensington & Chelsea

Benefit: London-wide

Amount recommended: £86,300

The Charity

Chelsea Physic Garden (CPG) founded in 1673, is one of Europe's oldest botanic gardens. It was created by the Society of Apothecaries, a Livery Company since 1617, to train apprentices to identify and test plants for medicinal use using specimens bought back from all over the world by the ships of the East India Company. It occupies four acres of land on the edge of the Thames displaying more than 5,000 plants. CPG contains the history of pharmaceutical plants, a garden of world medicine, the oldest rock garden in Europe along with glasshouses and many rare and endangered plants. In 1983, it became a registered charity and opened as a public garden and education resource.

CPG is maintained as a charity for public benefit with education as its principal charitable purpose. The Garden's role as a place of learning underlies and informs all of its activities. These educational aims are achieved through the provision of formal and informal learning for visitors and students about the importance of plants and environmental conservation. The medicinal plant display – one of the largest in the World - contains extensive ethnobotanics, useful and edible plant collections. Visitor numbers have increased steadily in recent years and the Garden now welcomes 50,000 visitors each year. The growth in visitor numbers reflects steadily increasing public awareness of the garden and provides the opportunity to more effectively fulfil its educational purpose through interaction with a widening and increasingly diverse audience.

The Application

CPG has been running an education programme for school children since 1983. This expanded in the 1990's offering directed learning to families, schools and teachers, alongside increased outreach educational centres. The Education Department currently provides curricular courses for over 3000 schoolchildren each year, and more than 1000 adults and teachers. CPG is seeking funding over three years towards the salary cost of the Education and Outreach Officer, central to developing the community education and outreach programme.

The Recommendation

This project builds on a pilot scheme funded by John Lyon's Charity to improve their current offer for families, working closely with teachers and increasing outreach activities to reach broader audiences. As well as an extensive programme of activities and events aimed at families, CPG gives regular public lectures and tours on a variety of botanical and horticultural subjects. It also operates a reciprocal volunteer/traineeship exchange programme with other botanical gardens. The education and outreach programme is of a high standard. The Band Trust has awarded £45,000 over three years towards the project costs. Funding is advised as follows:

£86,300 over three years (£20,400; £32,600; £33,300) towards the salary and on-costs of a full time Education and Outreach Officer.

Funding History

(None since 2004)

Background and detail of proposal

CPG is well regarded for its work with the local community and collaborates with a number of leading botanical, horticultural and related organisations. Its very active and growing education outreach programme has been successful with both schools and community groups with which they work. In addition, the programme now works with Waltham Forest Young Offenders Centre (WFYOC). These are 12-18 year olds, most of whom are engaging with horticulture and botany for the first time. The postholder will extend CPG's on-site and outreach educational programmes. This will increase the number of school visits and wider outreach with adults and community groups with a particular focus on groups experiencing social deprivation. CGP believes, given the success of the programme, there are opportunities to extend and widen activities to deliver a diverse range of enjoyable, high-quality learning experiences to inspire and engage participants of all ages. The project will build on the pilot and adapt to meet the needs of the growing and diverse communities in and around London.

Financial Information

CPG's income is principally generated from admission fees, annual subscriptions from Friends of the Garden and the Adult Education programme. In addition the commercial activities of CGP Enterprises Limited make a significant contribution, together with support from Charitable Trusts and Foundations. The charity receives support from over 100 volunteers donating their expertise, willingness and support in all areas of the organisations activities. Future plans include restoring the historic fabric, collections, and physical access to the Garden whilst protecting the character. CPG plan to invest around £10m with a proposal to be submitted to the Heritage Lottery Fund by end of 2017.

Year end as at 31st December	FY 15	FY 16	FY 17
	Audited Accounts	Audited Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	1,416,799	1,501,081	1,579,400
- % of Income confirmed	n/a	n/a	55%
Expenditure	(1,238,828)	(1,398,185)	(1,551,100)
Gains on Investments	21,249	403,402	
Total surplus/(deficit)	199,220	506,298	28,300
Split between:			
- Restricted surplus/(deficit)	(8,040)	4,365	107,400
- Unrestricted surplus/(deficit)	207,260	501,933	(79,100)
	199,220	506,298	28,300
Cost of Raising Funds	349,771	410,638	456,000
- % of income	24.7%	27.4%	28.9%
Operating expenditure (unrestricted funds)	1,144,257	1,308,195	1,511,100
Free unrestricted reserves:			
Free unrestricted reserves held at year end	587,767	612,174	533,074
No of months of operating expenditure	6.2	5.6	4.2
Reserves policy target	608,400	654,097	755,550
No of months of operating expenditure	6.4	6.0	6.0
Free reserves over/(under) target	(20,633)	(41,923)	(222,476)

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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Chelsea Physic Garden Company	
If your organisation is part of a larger organisation, what is its name? n/a	
In which London Borough is your organisation based? Kensington & Chelsea	
Contact person: Ms Philomena Robson	Position: Fundraising Manager
Website: http://www.chelseaphysicgarden.co.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 286513
When was your organisation established? 13/01/1983	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Improving London's Environment
Which of the programme outcome(s) does your application aim to achieve? More young people understanding the benefit of growing local food and its nutritional value More Londoners with a greater knowledge and understanding of the 'green' environment and biodiversity
Please describe the purpose of your funding request in one sentence. To support the education and outreach programme at Chelsea Physic Garden (CPG), to schools and communities in London area, with 3 year core funding grant
When will the funding be required? 01/07/2017
How much funding are you requesting? Year 1: £20,400 Year 2: £32,662 Year 3: £33,275 Total: £86,337

Aims of your organisation:

Chelsea Physic Garden is maintained as a charity for public benefit: education forms its principle charitable purpose. The Gardens role as a place of learning underlines and informs all its activities. Its charitable aims are achieved through the provision of formal and informal learning to students and visitors about the importance of plants and environmental conservation.

The Garden does this by:

- â€¢ maintaining documented plant collections in labelled and interpreted displays in a historic botanic garden
- â€¢ providing programmes of educational activities, publications and events
- â€¢ demonstrating the development of the science and practice of horticulture, botany and related disciplines through the historical role of the Garden
- â€¢ promoting the importance of the conservation of plants and the natural environment.

Main activities of your organisation:

Education has been central to the purpose of Chelsea Physic Garden since founded in 1673, by the Worshipful Society of Apothecaries of London. Substantially walled and bordering the River Thames on its southern boundary, a microclimate exists, enabling a hugely diverse collection of hardy and also tender plants to be maintained in the Garden and under glass.

We run a very active and growing outreach programme, we work with schools and communities across the London Boroughs including an ongoing programme in partnership with Waltham Forest Young Offenders. Every year we welcome over 5,000 schoolchildren and 50,000 visitors to the Garden, we also support the training and education of trainees, interns and dozens of gardening volunteers.

We give regular public lectures/tours on a variety of botanical and horticultural subjects. Our volunteers are guides, gardeners, educational support and administration, we operate a reciprocal volunteer/traineeship exchange programme with other botanical gardens.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
16	8	10	102

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	In perpetuity

Summary of grant request

CPG has been running a Directed Education programme for schools since 1983, although there is a tradition of local schools visiting the Garden dating back over a century. The programme expanded in the 1990's as the Garden built on the foundations of the original scheme, offering directed learning to families, schools and teachers, alongside increased outreach to other educational centres.

However we have been acutely aware that with very limited resources we have been unable to address the issue of broadening our offer to support socially disadvantaged children and adults.

With funding from John Lyons Charity we ran a pilot scheme to establish a 21stC relevant Education and Outreach programme.

The pilot developed the following key areas which we believe meets the Trust's programme outcomes of

"more Londoners with a greater knowledge and understanding of the 'green' environment and biodiversity"

"more young people understanding the benefit of growing local food and its nutritional value"

â€¢ Ensuring the relevance and value of CPG's educational programmes to their target audience by improved market research, also by monitoring the effectiveness of visits to the Garden and of CPG's various outreach activities.

â€¢ Improving the relevance of on-site and outreach teaching in response to changes in the National Curriculum through a cycle of annual planning and review of CPG's programmes in consultation with teachers. This includes the provision of improved materials and documentation for the programmes, including the production of 'before and after' materials for schools to maximise the benefit of a visit.

â€¢ Enhancing the benefit young people (and inter-generational families) gain from a visit to CPG (or outreach visits) by focusing upon life skills such as cooking, nutrition, and growing their own food, demonstrating the importance of plants in their lives as a means of developing their interest in science subjects and horticulture. Collaboration with and development of partnerships with teachers and other organisations involved in school gardening campaigns.

â€¢ Extending CPG's on-site and outreach educational programmes to children of secondary age by researching areas which support the curriculum. Increasing the number of school visits by primary school groups.

â€¢ Developing CPG's wider outreach with adults and children, community groups, clubs etc., focusing in particular upon groups from boroughs experiencing social deprivation and barriers through gender, ethnicity and financial need.

At the end of the pilot, the programme was scaled back until the publication of the Evaluation and Monitoring Report conducted by Botanic Gardens Conservation International. We are now ready to upscale the programme.

We are asking the City Bridge Trust to support our 3 year Education and Outreach programme by funding the post of Education and Outreach Officer. We have reached schools and communities throughout the London boroughs, who without the support of our outreach team would have few chances to engage in practical horticultural science. The post holder will be responsible for delivering the education programme to new and existing schools and communities throughout London.

In particular one of their main duties will be to run the outreach programme with Waltham Forest Young Offenders Centre, (WFYOC) with 12-18 year olds, most who are engaging with horticulture and botany for the first time.

Our programme meets the Trust's 'Principles of Good Practice' by involving teachers in the management and development of the school visits. We believe the international nature of our collection meets the multicultural diversity of London. All our 100+ volunteers receive support, training and mentoring to enable them to deliver an educational experience to our visitors. CPG actively works to reducing our carbon footprint and it is paramount to demonstrating sustainable environmental practices.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

Green Tourism, Growing Schools Garden, Site of Metropolitan importance for biodiversity within the RBKC, British Ecological Society: "Relevance of Ecology at CPG". Recognised Member of London Environmental Educator's Forum (LEEF)

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Encourage Young Offenders to make the link between growing plants and food consumption by extending our collaboration with organisations including the Waltham Forest Young Offenders Team. Increase their knowledge of the local biodiversity through pond and soil investigations including making animal habitats ie. bird and bee boxes.

Ensure the relevance and value of the CPG Education and outreach programmes by recruiting and training additional volunteers to collect and collate data and up-skill current volunteers, identifying and training a Volunteer Champion to manage the Education Volunteer programme including outreach.

Improving teacher involvement. Continue to improve the relevance of on-site and outreach teaching in response to changes in the National Curriculum in consultation with teachers. Continue to improve materials and documentation for the programmes, particularly developing content for pre and post visit to maximise the benefit.

Continue to build on CPG's existing outreach with children, adults, communities groups etc., extend the focus on groups/schools from boroughs experiencing social deprivation and financial barriers. Increase work started with refugee groups and Local Authority Gardening groups. Establish CPG Outreach Gardens, taking our work beyond our walls and borough.

Networking and collaborations, sharing of precious resources, is a key objective for the next three years, looking at in particular the issue of social isolation. Working with Hammersmith and Fulham, experimenting with joint school visits and their input at our regular teachers' evenings to promote their services alongside ours.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Create understanding of where food comes from. This will have had a positive effect on Young Offenders, increasing their life skills and respect for nature and the environment. Reinforcing the origins of common food plants and celebrate the multicultural nature of London. Income they generated will be reinvested by them.

The programme will have been critically reviewed and improved to support National Curriculum priorities, through the collection and review of evaluation. Volunteer skills will have been developed and their integration into CPG will have been enhanced.

Increased and deepened Teacher participation aims to increase the popularity and ensure content of the education programme meet needs, leading to increased visibility and profile of the Garden, broadened knowledge of the resource as a green environment and bio-diversely rich location.

Outreach is more than just visits. We engage with schools & communities who are potentially excluded from CPG for social/financial reasons. We use our knowledge, plants, seeds and history to enable groups to understand CPG's history and how this links to their cultural heritage and plants and their communities.

Broadening the reach of networks and collaborations across London, enabling us to share resources to address social issues such as isolation, though shared experiences.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

CPG is committed to a programme of major refurbishment and refreshment. A strategic part of the development project is the Education Dept and its requirements, CPG has a good record of securing educational grants including previous support from City Bridge Trust, John Lyons Charity and the Heritage Lottery Fund. Income from other activity partly supports education costs.

Who will benefit?

About your beneficiaries

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

~~9,000~~ 200

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

11-20%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salaries inc on costs	32,000	32,662	33,275	97,937
Programme and web resources	3,000	3,000	3,000	9,000
Networking/membership costs	3,593	4,000	4,100	11,693
Travel/subsistence outreach	1,757	1,850	1,950	5,557
Departmental Administration costs	1,800	1,800	1,800	5,400
Volunteer training x 5 people	250	250	250	750
Subsidise (travel) for outer borough "free" schools/communities visit CPG	2,000	3,000	4,000	9,000
Contingency inc capacity for additional temp staff	2,000	2,000	2,000	6,000
TOTAL:	46,400	48,562	50,375	145,337

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Educational and Outreach Grant carried forward	9,000			9,000
Major Donor	3,000			3,000
The Band Trust - Educ. & Outreach Programme	15,000	15,000	15,000	45,000
TOTAL:	27,000	15,000	15,000	57,000

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
TOTAL:				0.00

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary Full time Horticultural Education and Outreach Officer inc on-costs (pension etc)	20,400	32,662	33,275	86,337
TOTAL:	20,400	32,662	33,275	86,337

Finance details

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

Financial year ended:	Month: 31 December	Year: 2016
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Income received from:	£
Voluntary income	0
Activities for generating funds	684,935
Investment income	82,558
Income from charitable activities	471,556
Other sources	262,032
Total Income:	1,501,081

Expenditure:	£
Charitable activities	987,547
Governance costs	0
Cost of generating funds	410,638
Other	
Total Expenditure:	1,398,185
Net (deficit)/surplus:	102,896
Other Recognised Gains/(Losses) Net Gain on Investments:	403,402
Net Movement in Funds:	506,298

Asset position at year end	£
Fixed assets	343,655
Investments	2,902,695
Net current assets	719,340
Long-term liabilities	0
*Total Assets (A):	3,965,690

Reserves at year end	£
Restricted funds	87,717
Endowment Funds	3,165,799
Unrestricted funds (Includes Designated Funds of £100,000)	712,174
*Total Reserves (B):	3,965,690

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

There have been no significant changes.

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
John Lyons Charity	0	40,000	35,000
The John P Getty Trust	50,000	25,000	20,000
Western Riverside Environmental Fund	0	25,000	0
The Steel Trust	0	20,000	0
Eranda Rothschild Foundation	15,000	22,000	22,000

Declaration

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

Please confirm: Yes Full Name: **Mrs Sue Medway**

Role within **Director & Curator**
Organisation:

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MEETING: 20/09/2017

Ref: 14015

ASSESSMENT CATEGORY - Improving Londoners' Mental Health

Gendered Intelligence CIC

Adv: Shegufta Rahman

Base: Islington

Amount requested: £125,052

Benefit: London-wide

Amount recommended: £125,100

The Charity

Gendered Intelligence (GI) was established as a Community Interest Company (CIC) in 2008, working to improve the quality of life experienced by young, transgender (trans) people aged eight through to 30 years. Working predominantly with the trans community and those who impact on trans lives (including parents, teachers, policy makers and organisations) GI's work increases understanding of gender diversity.

The Application

The CIC is looking to play its part in encouraging the cultural shift needed to increase understanding of trans and gender variant lives. GI is requesting funding for its Volunteering Project to meet the needs of the large increase in the number of young trans people seeking support. Poor mental health is a significant issue among young trans people, many of whom self-harm. The Volunteering Project will build a support network to enable them to access the support they need, increase the visibility of trans people and increase the understanding of gender diversity in the wider public, whilst offering new volunteering opportunities to a vulnerable group to improve confidence and reduce poor mental health.

The Recommendation

GI has demonstrated a strong track record in supporting this vulnerable group. With a unique insight into the experience of being trans, this CIC is seen as a lead organisation with working and in-depth knowledge of the wider trans community and of the younger trans people in particular. With growth in services and income, GI has also secured funding from numerous grantmaking organisations such as BBC Children in Need, The Esmée Fairbairn Foundation, Tudor Trust and Henry Smith Charity for numerous projects and posts; testament to the effectiveness of this CIC.

£125,100 over three years (£41,600, £41,700, £41,800) for the FT salary of the Volunteering Project Coordinator and associated project costs.

Funding History

None.

Background and detail of proposal

In a 2013 Youth Chances survey of 1,000 young trans people, 72% self-harmed; 66% had a mental health condition affecting their normal activities; 35% had attempted suicide, and 25% had attempted suicide more than once. The extremely high number of young trans people who experience mental health issues such as anxiety, panic disorder and depression has a direct effect on school attendance and attainment. The 2016 House of Commons *Transgender Equality* report states that "transgender people face continuing transphobia, increased mental health issues, discrimination in the provision of public and private services and bullying in our schools". GI provided evidence to support these issues to this parliamentary select

committee. With strong working relationships across sectors, including but not limited to; The Science Museum, Stonewall, The Football Association, The Rugby Council, NSPCC, and the Metropolitan Police, it is unique in its widely-recognised expertise in this area. Its training and education arm, through which tailored training products generate income, enable the organisation to work with schools and universities, both in the wider context of understanding gender diversity, but also creating a referral route into the organisation for trans young people. The Gender Identity Development Service (Tavistock Clinic) is the only UK Gender Clinic which supports children, and has seen referrals increase by 50% a year since 2010. In the past year, it has had an unprecedented increase of 100% up from 697 to 1,398 referrals. GI has a strong working relationship with the Tavistock Clinic, with established referral processes.

The Volunteering Project is borne out of the organically growing pool of skilled volunteers wishing to support the work of this organisation. Often, young trans people are supported by GI into adulthood, but wish to remain involved with the organisation, and volunteering is crucial to enabling the continuation of this relationship. 50% of current volunteers identify as trans; offering a good mix of diversity. The Volunteering Project Coordinator will be responsible for increasing recruitment and training of volunteers, developing and delivering programmes in schools, colleges and universities, and further developing and formalising the many cross-sectoral networks of support for beneficiaries.

Financial Information

As a CIC limited by guarantee, the organisation is not required to report against restricted and unrestricted funds, nor the cost of generating funds. Whilst a reserves policy is also not a requirement, GI recognises this as good practice. Having secured a number of grants from a variety of funders, the organisation is expecting significant surplus in the pipeline from its trading income. A substantial proportion of this will go towards building the reserves position to be more proportionate to GI's growth in income and align with its reserves policy. The balance of unconfirmed income for 2018 is its expected trading income.

Whilst GI has done well to grow its trading income over nine years and achieve a level of sustainability, it recognises there are compelling, financial arguments for becoming a charity. The organisation will undertake a scoping exercise this financial year to determine the benefits and suitability of registering as a charity.

Year end as at 30 June	2016	2017	2018
	Audited Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	208,016	230,955	382,439
- % of Income confirmed as at 05/08/2017	n/a	100.00%	51%
Expenditure	(199,557)	(232,980)	(366,119)
Total surplus/(deficit)	8,459	(2,025)	16,320
Operating expenditure	199,557	232,980	366,119
Free unrestricted reserves:			
Free unrestricted reserves held at year end	22,160	20,135	36,455
No of months of operating expenditure	1.3	1.0	1.2
Reserves policy target	49,889	58,245	91,530
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(27,729)	(38,110)	(55,075)

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Gendered Intelligence CIC	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Islington	
Contact person: Mr Jay Stewart	Position: CEO
Website: http://genderedintelligence.co.uk/	
Legal status of organisation: Registered community interest	Charity, Charitable Incorporated Company or company number: 06617608
When was your organisation established? 19/05/2008	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Improving Londoners' Mental Health
Which of the programme outcome(s) does your application aim to achieve? More LGBT people accessing mental health services resulting in improved mental health and reduced mental distress A reduction in suicide and self-harm amongst the recognised at risk groups
Please describe the purpose of your funding request in one sentence. We will develop a Volunteer Programme to improve the quality of trans peoples lives, improve mental health and increase understanding of gender diversity.
When will the funding be required? 01/07/2017
How much funding are you requesting? Year 1: £41,684 Year 2: £41,684 Year 3: £41,684 Total: £125,052

Aims of your organisation:

We improve the lives of young transgender people. Trans' describes the spectrum of people who feel they are gender variant including transgender, transsexual and non-binary. We increase the visibility of trans experience and understanding of gender diversity among parents, teachers and the wider public. Young trans people are vulnerable. They experience isolation & rejection. Our work creates safe spaces where young people can meet.

Our aims are...

1. To increase the quality of trans people's lives
2. To increase the visibility of trans lives, to improve understanding and raise awareness
3. To educate the wider public in order to reduce prejudice and increase understanding about the diversity and complexity of gender

Unlike other organisations, we are not just trying to create change in our beneficiaries. We want to change the world in which they live so that they can be free from prejudice and have the same opportunities as their peers. We want everyone to be more intelligent about gender.

Main activities of your organisation:

1) Trans Youth Work -- Regular meetings help young people to access information & explore their identity. We run sessions on bullying, improving mental health & accessing NHS support. We run a Summer Camp where young people develop friendships which become an ongoing support network.

2) Work in Education -- A package of support in schools and colleges. Non-trans students who attend workshops are more likely to challenge homophobic behaviour. Our trans identified mentors advocate for students and make schools safer for trans students. Our training helps teachers support trans students who fail to fulfil their potential.

3) Professional Services -- Training and Consultancy. We have helped organisations work towards trans inclusions eg. Stonewall, The Football Association, Welsh Assembly, NSPCC, Girl Guides, Tesco Bank, Transport for London, CAMHS and more.

4) Public Events -- Trans Conferences; booklets & web resources; Special Projects. Eg. 'What makes your gender? Hacking into the Science Museum' a £10,000 project with the Science Museum.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
2	2	5	30

Property occupied by your organisation

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

Summary of grant request

Gendered Intelligence exists to support young, trans people.

The Need

Poor mental health is a significant issue among young trans people many of whom express their dissatisfaction with their body by self-harming. The statistics are alarming. In a 2013 Youth Chances surveyed 1000 young trans people, 72% self-harmed; 66% had a mental health condition affecting their normal activities; 35% had attempted suicide; 25% had attempted suicide more than once.

The extremely high number of young trans people who experience mental health issues such as anxiety, panic disorder & depression has a knock on effect on school attendance and attainment. Young trans people feel isolated, fearful and worthless. Some experience rejection by family and friends. Others feel the need to hide their identity. Young trans people regularly experience prejudice and discrimination. They face abuse and bullying. The Trans Mental Health Study 2012 found that "young transgender people are particularly vulnerable to discrimination and harassment". Of the 889 participants, 81% had avoided situations in public spaces due to fear; 38% experienced physical intimidation and threats; 19% had been beaten up and 14% had been sexually assaulted.

The No's

In 2016 Gendered Intelligence supported over 400 vulnerable young people who experienced isolation, loneliness, fear, abuse, bullying and discrimination.

There has been a large increase in the number of young trans people seeking support. Referrals to all gender services are increasing. The Tavistock clinic, the only UK Gender Clinic which supports children, has seen referrals increase by 50% a year since 2010. In 2016 a Government report on Transgender Equality acknowledged that 'transgender people face continuing transphobia, increased mental health issues, discrimination in the provision of public and private services and bullying in our schools'

Aims

Our Volunteering Project will address this need by

- 1) Reducing isolation by increasing peer support for young trans people
- 2) Building new support networks which help young trans people to access the support that they need
- 3) developing a stronger trans community
- 4) increasing the visibility of trans people
- 5) increasing understanding of gender diversity in the wider public including parents and teachers who have an important influence over the lives of young trans people
- 6) providing new volunteer opportunities to a vulnerable group leading to increased confidence and employability.

How?

We attract Trans volunteers who offer support to young trans people, to parents, teachers, employers and the wider public. They do this at our regular monthly youth groups; as trained mentors in schools; at teacher training days; at parent support groups; at workplace training days and at community events.

One young person said 'I love coming to these groups and seeing other young trans people going through the same difficulties as myself'. This peer support allows young trans people to feel that they belong to a trans community which can help them to develop resilience to face discrimination and sometimes rejection by family and friends.

Why GI?

GI is a Trans led organisation with a unique insight into the experience of being trans. We are leaders in the Trans Community. We have a working and in-depth knowledge of the wider trans community and of the young trans community in particular. We are a member of the Trans Youth Network -- a national network for those delivering support programmes for young trans people. We are regularly consulted on Trans issues by government, ministry of justice, police, schools and colleges etc.

We meet the Trust's 'Principles of Good Practice'

â€¢ We involve service users in planning our services

â€¢ We value diversity

â€¢ We value and support volunteers

â€¢ We are reducing our carbon footprint.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Increase volunteer numbers by recruiting and training 20 new volunteers each year to support young trans people at our regular Youth Support groups; in schools and at community events.

Hold regular monthly volunteer meetings which provide peer support, volunteer training and at which volunteer opportunities will be advertised to the group.

Train a group of 4 volunteers each year to work in schools, colleges and universities. They will support our education facilitators to deliver workshops and assemblies. For this reason they need intensive training and vetting (DBS and references).

Establish a new online volunteer support network in the form of a closed group so that volunteers can share ideas and experiences with each other in a safe and supported setting.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Young trans people in London will feel less isolated & know where and when to seek mental health support.

Young trans people in London will feel happier because they belong to a vibrant and supportive trans community.

There will be increased volunteering opportunities for trans people leading to improved confidence and employability

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

As a Community Interest Company and a Social Enterprise, Gendered Intelligence generates revenue from a range of income streams. We have been extremely successful in selling our services and plan to develop this work as our reputation builds. In future we anticipate that this revenue will fully cover our core operating costs.

Who will benefit?

About your beneficiaries

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

600

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

London-wide (100%)

What age group(s) will benefit?

16-24

25-44

45-64

What gender will beneficiaries be?

All

Male

Female

Transgender or other gender identity

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

11-20%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Volunteer Project Coordinator	28,000	28,000	28,000	84,000
National Insurance	3,864	3,864	3,864	11,592
Hire of Desk Space at VAI (Voluntary Action Islington)	3,640	3,640	3,640	10,920
Clinical Supervision	1,440	1,440	1,440	4,320
Meeting Room Hire	840	840	840	2,520
Admin Support (2 hrs pw)	1,040	1,040	1,040	3,120
Printing, Office Costs & Stationery	1,560	1,560	1,560	4,680
Travel	1,300	1,300	1,300	3,900
	0	0	0	0

TOTAL:	41,684	41,684	41,684	125,052
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Volunteer Project Coordinator	28,000	28,000	28,000	84,000
Hire of Desk Space at VAI (Voluntary Action Islington)	3,640	3,640	3,640	10,920
Clinical Supervision	1,440	1,440	1,440	4,320
Meeting Room Hire	840	840	840	2,520
Admin Support (2 hrs pw)	1,040	1,040	1,040	3,120
Printing, Office Costs & Stationery	1,560	1,560	1,560	4,680
Travel	1,300	1,300	1,300	3,900
National Insurance	3,864	3,864	3,864	11,592
	0	0	0	0

TOTAL:	41,684	41,684	41,684	125,052
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Finance details

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

Financial year ended:	Month: June	Year: 2016
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Income received from:	£
Voluntary income	36,571
Activities for generating funds	112,634
Investment income	0
Income from charitable activities	58,811
Other sources	0
Total Income:	208,016

Expenditure:	£
Charitable activities	58,811
Governance costs	0
Cost of generating funds	138,631
Other	0
Total Expenditure:	197,442
Net (deficit)/surplus:	8,459
Other Recognised Gains/(Losses):	-2,115
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	22,160
Long-term liabilities	0
*Total Assets (A):	22,160

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	22,160
*Total Reserves (B):	22,160

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources? 0%
--

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts: None
--

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Welcome Trust	30,000	0	0
Heritage Lottery Fund	10,000	0	0
Children In Need	0	19,990	0
Evening Standard Dispossessed Fund	0	0	20,000
Esmee Fairbairn	0	0	38,638

Declaration

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

Please confirm: Yes Full Name: **Jay Stewart**

Role within **CEO**
Organisation:

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MEETING: 20/09/2017

Ref: 14172

ASSESSMENT CATEGORY - Making London Safer

National Society for the Prevention of Cruelty to Children

Adv: Kate Moralee

Amount requested: £272,400

Base: Hackney

Benefit: Croydon and East London

Amount recommended: £270,000

The Charity

The National Society for the Prevention of Cruelty to Children (NSPCC) is a national charity whose vision is to end cruelty to children. The organisation's aim is to be there for every child whenever they need help, and to transform society so that no child ever suffers abuse.

The Application

In September 2014 you awarded NSPCC £180,000 over 2 years to employ two case workers for a Protect and Respect project in Croydon and in East London. The service aimed to provide a range of preventative and protective initiatives for young people experiencing Child Sexual Exploitation (CSE). This application requests continuation funding for NSPCC to continue delivering this service scaling up preventative work, specifically in secondary schools in London, and developing a strategic framework to improve local response to CSE nationally.

The Recommendation

The NSPCC is one of the leading organisations in this area of work, CSE being recently recognised as a specific form of abuse. Defining CSE as a form of abuse has been a major aspect of the project to date. The previous project began as a manualised programme (a one size fits all approach), however the learning from that identified that a young person relationship-led service is critical to achieving positive outcomes. The work in Croydon and East London form part of a wider project which will culminate in the development of a Theory of Change (ToC). The ToC is a significant piece of work and will have a profound impact on national practice supporting young people experiencing CSE.

The level of funding requested and recommended includes provision for 2 fte staff. Usually you support one only for "standard" grants but as this is specialist and strategic work across London then it is considered appropriate to support as advised.

£270,000 over 3 further and final years (3 x £90,000) towards the salary costs of two Protect and Respect Case Workers, for Croydon and East London respectively.

Funding History

Meeting Date	Decision
25/09/2014	£180,000 over two years (£90,000; £90,000) towards the salary costs of two of the Protect and Respect case-workers.
26/03/2009	£50,000 over 2 years (£25,000, £25,000) towards the costs of a practitioner supporting young people involved in gangs or victims of domestic violence and anger management in Tower Hamlets.

Background and detail of proposal

1,000 cases of CSE were reported in London in the last year, a 50% increase between 2014 and 2016. This is due to several factors and in part as a result of the work of the Protect and Respect service. The scale and importance of reports and responses across London is critical in contributing to and developing a good practice framework to support young people experiencing CSE in a consistent manner.

Although this proposal seeks funding for the practice interventions of two case workers in London this cannot be separated from the strategic impact of the wider project - on national good practice and on policy development in this field. The practitioners either attend or feed into various panels and forum across London to contribute to the development of CSE procedures and guidance; they have had 5,000 contacts from other agencies in East London and Croydon for support with cases; and they provide training workshops to improve skills in the area.

Learning to date has identified the need to provide a young person centred, trauma informed, relationship-led response to CSE. The premise of a Trauma Informed Response is the provision of safety as critical to starting the journey of recovery. When providing support to young people who are currently experiencing CSE it may not be possible to provide that “safety” therefore developing a trauma led approach in this arena is innovative and unique. It advocates creating a window of opportunity allowing the young people a voice whilst using trauma informed principles to provide the opportunity to support young people through the traumatic experiences and beyond.

Being able to understand, describe and articulate a national response to CSE is critical at this point in time as currently there are a number of wide and divergent local responses. NSPCC has a weight of evidence - over 3,000 contributions from young people (not all from London) input into their 5 evaluations to date. The key strategic aim of this proposal and of the 5 evaluations covering practice and process is to develop a Theory of Change. The ToC will provide an analysis of the various pathways into CSE for young people (dependent on numerous vulnerability factors in a young person's life experience) and provide correlating possible responses and interventions. This is critical in supporting Local Authorities in being able to commission services effectively, and in identifying some of the challenges they may face and how to pre-empt those challenges.

Financial Information

NSPCC is a financially well managed charity. It experienced significant investment losses in y/e 2016 and gains in y/e 2017. In 2015 A full actuarial valuation of the pension was carried out at 31 March 2015 and updated to 31 March 2017 by a qualified actuary. The updated valuation has resulted in a pension deficit of £21,000,000 in y/e 2017. The charity has agreed with Trustees that it will aim to eliminate the deficit over a period of seven years and nine months from 5 April 2015 by the payment of £1,000,000 per annum until 31 December 2017 and £2,000,000 per annum from 1 April 2017 to 31 December 2022. In addition the defined benefit pension scheme was closed to new members on 1 July 2002.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Audited	Draft Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	128,912,000	127,000,000	122,000,000
- % of Income confirmed @ 21.8.17	n/a	n/a	45%
Expenditure	(126,444,000)	(121,000,000)	(121,000,000)
Losses/Gains on investment/pension	(1,087,000)	(20,400,000)	
Total surplus/(deficit)	1,381,000	(14,400,000)	1,000,000
Split between:			
- Restricted surplus/(deficit)	73,000	500,000	190,000
- Unrestricted surplus/(deficit)	1,308,000	(14,900,000)	810,000
	1,381,000	(14,400,000)	1,000,000
Cost of Raising Funds	25,851,000	24,000,000	25,000,000
- % of income	20.1%	18.9%	20.5%
Operating expenditure (unrestricted funds)	105,048,000	98,000,000	98,010,000
Free unrestricted reserves:			
Free unrestricted reserves held at year end	53,099,000	38,199,000	39,009,000
No of months of operating expenditure	6.1	4.7	4.8
Reserves policy target	26,262,000	24,500,000	24,502,500
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	26,837,000	13,699,000	14,506,500

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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: National Society for the Prevention of Cruelty to Children	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Hackney	
Contact person: Mr Johnnie Hoogewerf	Position: Philanthropy Manager
Website: http://https://www.nspcc.org.uk/	
Legal status of organisation: First Contact	Charity, Charitable Incorporated Company or company number: 216401
When was your organisation established? 08/07/1884	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Making London Safer
Which of the programme outcome(s) does your application aim to achieve? More survivors of trafficking accessing quality specialist support to improve their safety, health and well-being and to beginning to reintegrate into society Children and young people living in refuges accessing specialist support that helps reduce trauma, increases resilience and gives them a voice
Please describe the purpose of your funding request in one sentence. To support young people in Croydon and East London, who have been, or are at risk of being, sexually exploited.
When will the funding be required? 01/04/2017
How much funding are you requesting? Year 1: £90,800 Year 2: £90,800 Year 3: £90,800 Total: £272,400

Aims of your organisation:

At the NSPCC we fight for every childhood. We help children who have been abused to rebuild their lives, protect those at risk, and find the best ways to prevent abuse from ever happening in the first place.

We believe abuse is preventable, not inevitable and that everyone has a part to play in keeping children safe. Over the next five years we have set ourselves 5 goals to make 5 million children safer. These are to:

- 1) Prevent child abuse in families facing adversity
- 2) Prevent child sexual abuse
- 3) Help children speak out and adults take action about abuse
- 4) Help children who've experienced abuse get back on track
- 5) Make children safe from abuse online

Main activities of your organisation:

Our aims are underpinned by our national and local services. Nationally, Childline is our 24-hour free helpline for children to contact with any concern. Our national campaigns, help parents keep their children safe or urge the government to act in children's best interest.

Locally, we deliver projects across the UK in areas of especially high need. We work with local communities and use the latest evidence from around the world to provide cutting-edge services. These services tackle a social issue affecting children and families in a specific area. By taking this approach, we keep children safe from abuse, support those affected by it, empower communities with the belief and skills to solve their problems, and learn about how best to prevent child abuse. We then share our findings with partner agencies and local authorities to scale up these services and improve support for children across the UK.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
1,830	219	8	11,000

Property occupied by your organisation

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

Summary of grant request

Almost 1,000 children are sexually exploited in London each year and, given the underreported nature of this crime, there are many more we are unaware of. Child sexual exploitation (CSE) has a devastating impact on the lives of young people. It can leave them with physical and emotional damage and lead to problems with forming relationships, mental health, substance misuse and criminal activity.

The City Bridge Trust has generously supported the NSPCC to play a central role in keeping children safe from CSE in London. Now, we hope the Trustees will consider supporting the equivalent of two practitioners of our Protect and Respect (P&R) programme in Croydon and East London with a grant of £272,400 over three years.

Further investment in P&R will help us to take the next step in combatting CSE by working with thousands of children at risk of abuse and supporting those who have been affected by it. We will be working in areas, such as, Tower Hamlets (in East London) which has the highest rates of CSE in London, and Croydon which has the third highest.

Building on your previous support, we aim to transform pan-London (and UK-wide) practice in keeping children safe from CSE by encouraging partner agencies to follow our approach. We will do this through sharing evaluations and our theory of change, producing frameworks for local authorities to assess and improve their approaches to CSE, and develop and scale-up new services based on our learning.

P&R is designed for children whose circumstances make them particularly vulnerable to CSE, such as those from minority ethnic backgrounds, with learning disabilities, questions about their sexuality, who have been trafficked, are in care, or who frequently go missing. P&R offers a combination of one-to-one sessions, group work and multi-agency work.

In one-to-one sessions, we tailor our approach for each young person depending on the level of risk they face. This may include teaching them how to stay safe, providing therapy to help them overcome trauma, or supporting them to build resilience against abusive relationships.

Group work is delivered in community settings, with sessions aiming to increase young people's understanding and awareness of healthy relationships and to help them to respond appropriately to risks.

Through our multi-agency work, we provide information and support to partner agencies, thereby ensuring that all stakeholders in a young person's life (police, social services, schools, etc) are acting in a coordinated way to keep them safe. We also deliver training to professionals to improve their ability to spot warning signs and refer young people to services promptly.

With over 15 years' experience delivering similar programmes focussed on CSE and trafficking, the NSPCC is best placed to deliver this work. Tackling CSE requires collaboration between multiple stakeholders, and our strong relationships allow us to work effectively with others, strengthening the multi-agency response.

Our proposal contributes to the 'Making London Safer' programme outcomes by providing specialist support for children in refuges that helps increase resilience, reduce trauma and gives them a voice. It also provides quality specialist support to improve the safety, health and wellbeing of survivors of trafficking.

All staff must comply with our Equality and Diversity Policy and complete the related

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

The International Organisation for Standardisation (ISO) awarded us for information security as part of the Safe Network contract requirements with the

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

One-to-one sessions, which can include: teaching a young person how to stay safe from sexual exploitation, providing therapeutic and advocacy support, working with stakeholders to reduce the immediate risks a child faces. With the consent of a young person, we will also offer one-to-one sessions with parents and carers.

Group sessions: delivered in school and community settings and targeted to young people who are vulnerable to but not at immediate risk of child sexual exploitation.

Multi-agency partnership work: sharing information, providing support and advice to partner agencies, delivering awareness raising and training sessions to professionals.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

A reduction in the risk of child sexual exploitation for the young people we work with. Young people will learn how to make safe decisions and avoid risky situations in future.

An improvement in wellbeing in the young people we work with. Young people will build resilience and be less vulnerable to risky situations and circumstances which can lead to sexual exploitation.

A reduction in the trauma in the young people we work with. Young people will be able to understand that they were abused, that it was not their fault and rebuild their lives.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes, if the evaluations prove successful, we plan to continue Protect and Respect either through our own service delivery or through training other agencies to deliver the programme. Should we continue to deliver the service ourselves we

Who will benefit?

About your beneficiaries

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

175

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

Bromley (8%)

Croydon (43%)

Newham (28%)

Redbridge (6%)

Tower Hamlets (15%)

What age group(s) will benefit?

0-15

16-24

What gender will beneficiaries be?

All

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

A range of ethnic groups

White (including English/ Welsh/ Scottish/ Northern Irish/ British; Irish; Gypsy, Traveller or Irish Traveller; Any other White background)

Mixed / Multiple ethnic groups

Asian/ Asian British (including Indian; Pakistani; Bangladeshi; Chinese; Any other Asian background)

**Black/ African/ Caribbean/ Black British (including African; Caribbean; Any other
If Other ethnic group, please give details:**

What proportion of the beneficiaries will be disabled people?

21-30%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Children's Service Practitioners' salaries	223,200	223,200	223,200	669,600
Administrators' salaries	22,600	22,600	22,600	67,800
Team Managers' and Service Managers' salaries	55,800	55,800	55,800	167,400
Other Staff costs	5,600	5,600	5,600	16,800
Premises	52,300	52,300	52,300	156,900
Motor and Travel	4,300	4,300	4,300	12,900
Other costs: printing and stationary, event costs and IT and Telephony	30,800	30,800	30,800	92,400
Project Development costs	12,600	12,800	13,000	38,400
Evaluation costs	18,000	3,600	3,600	25,200

TOTAL:	425,200	411,000	411,200	1,247,400
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Major Giving Individual (towards Croydon practitioner salaries)	50,000	50,000	50,000	150,000
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	50,000	50,000	50,000	50,000
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Children's Service Practitioners' salaries	90,800	90,800	90,800	272,400
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	90,800	90,800	90,800	272,400
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Finance details

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

Financial year ended:	Month: March	Year: 2016
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Income received from:	£
Voluntary income	106,871,000
Activities for generating funds	9,554,000
Investment income	966,000
Income from charitable activities	11,427,000
Other sources	94,000
Total Income:	128,912,000

Expenditure:	£
Charitable activities	97,658,000
Governance costs	631,000
Cost of generating funds	25,755,000
Other	2,400,000
Total Expenditure:	126,444,000
Net (deficit)/surplus:	2,468,000
Other Recognised Gains/(Losses):	-1,087,000
Net Movement in Funds:	1,381,000

Asset position at year end	£
Fixed assets	34,536,000
Investments	46,745,000
Net current assets	7,361,000
Long-term liabilities	3,930,000
*Total Assets (A):	84,712,000

Reserves at year end	£
Restricted funds	8,167,000
Endowment Funds	1,391,000
Unrestricted funds	75,154,000
*Total Reserves (B):	84,712,000

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
1-10%

Organisational changes

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

N/A

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	3,833	42,167
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	3,768,000	3,279,000	4,116,000
Other statutory bodies	2,756,000	2,458,000	2,490,000

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Big Lottery Fund	4,500,000	4,500,000	4,500,000
The Ellerdale Trust	900,000	900,000	0
Big Lottery Fund Scotland	375,000	500,000	125,000
Thompson Family Charitable Trust	500,000	100,000	100,000
BBC Children in Need	100,000	185,000	202,000

Declaration

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

Please confirm: Yes Full Name: **Johnnie Hoogewerf**

Role within **Philanthropy Manager**
Organisation:

MEETING: 20/09/2017

Ref: 13862

ASSESSMENT CATEGORY - Making London Safer

Stop the Traffik

Amount requested: £167,485

Amount recommended: £98,400

Adv: Shegufta Rahman

Base: Lambeth

Benefit: Kensington & Chelsea,
Westminster and Hammersmith
& Fulham

The Charity

Stop the Traffik (STT) was established in 2008 to prevent modern slavery and human trafficking. The charity's objective is to prevent abuse and harm caused by modern slavery and human trafficking by engaging in: community transformation by empowering individuals to take action to prevent trafficking in their communities; global campaigning to inform consumers on how trafficking impacts the supply chains of businesses world-wide; and gathering and sharing knowledge through its Centre for Intelligence Led Prevention.

The Application

Following the success of STT's community transformation pilot projects in Manchester and the London Tri-Boroughs (Kensington & Chelsea, Westminster and Hammersmith & Fulham), the charity is seeking longer-term funding to continue its work under the European Communities Against Trafficking (ECAT) pilot programme in London.

The Recommendation

STT has demonstrated the strength of its role in the ECAT project in London and the need to continue this strategic work following the project's end, and build on the success of its work in Manchester. The amount recommended is at a reduced rate in recognition of the organisation's strong reserves position and ability to contribute some of its own funds towards this project.

£98,400 over three years (£32,200, £32,800, £33,400) for the FT salary of the Modern Slavery Network and Community Engagement Coordinator in London.

Funding History

None

Background and detail of proposal

STT received funding from the European Commission in 2012 to form a partnership with numerous organisations, including SC07 (the Metropolitan Police's anti-trafficking and kidnap unit) and the Tri-Borough area. The aim of the project was to establish a multi-agency, best practice approach to community engagement in the prevention of human trafficking alongside victim-centred intervention and aftercare, which can then be replicated trans-nationally. STT's role was to provide awareness and training to councils, police, victim support, housing, health, community groups and NGO's. Over the two years of the project STT trained 224 volunteers and 950 front-line professionals to spot the signs of trafficking. The collaboration exposed and disrupted six trafficking rings across the three boroughs and over 300 potential trafficking victims were identified.

In Manchester, STT has had a Coordinator in post since 2015, supporting a joined-up approach to work amongst local organisations and Greater Manchester Police

(GMP). GMP has seen a 197% increase in numbers of trafficking victims referred to the National Referral Mechanism. Part of the Coordinator's role has been to coordinate the Greater Manchester Modern Slavery Response Network, which includes: GMP, NGO forum, multi-faith forum, statutory services, business sector, voluntary groups and the local community. The pilot has been innovative and successful, as evidenced by the coordinator recently receiving a GMP Chief Constable's Commendation for "...her role in establishing a pioneering, multi-agency Modern Slavery Coordination Unit. This unit is recognized as a "leading light" in this field and has already saved lives and rescued people from circumstances they described as "worse than death"."

Although adapted to fit the needs of the local area, the proposed project will replicate the Manchester model in the London Tri-Borough area. It will ensure survivors identified in the Tri-Borough area have access to information, advice and advocacy needed as they re-integrate back into society. It will also build the personal resilience of vulnerable individuals in the area equipping them to identify trafficking and resist being trafficked. In addition, the project will mobilise a cross section of organisations, including local NGOs, statutory services and community groups, to work together to increase awareness of modern slavery and human trafficking, spot and stop it where it does exist, report potential victims, prevent it from occurring, and identify gaps for victim support.

Financial Information

STT successfully applied for The Financial Times Seasonal Appeal in 2014. This provided the charity with a communications platform on scale, nurtured relationships with banks and businesses, and led to a significant increase in income in 2015/16. The organisation has followed a strategic plan to grow its activities and annual spend. However, STT's reserves policy is to hold three months of expenditure. Given its current and projected level of reserves are above its reserves policy, the recommended amount is only for the salary costs, and does not include the associated project costs requested, which the organisation could self-fund.

Year end as at 31st August	FY 15/16	FY 16/17	FY 17/18
	Audited Accounts	Budget	Forecast
	£	£	£
Income & expenditure:			
Income	438,391	303,062	452,333
- % of Income confirmed as at 31/07/2017	n/a	n/a	29%
Expenditure	(272,139)	(346,152)	(448,364)
Total surplus/(deficit)	166,252	(43,090)	3,969
Split between:			
- Restricted surplus/(deficit)	6,459	0	0
- Unrestricted surplus/(deficit)	159,793	(43,090)	3,969
	166,252	(43,090)	3,969
Cost of Raising Funds	10,680	30,431	32,400
- % of income	2.4%	10.0%	7.2%
Operating expenditure (unrestricted funds)	227,463	265,752	189,031
Free unrestricted reserves:			
Free unrestricted reserves held at year end	225,487	182,397	186,366
No of months of operating expenditure	11.9	8.2	11.8
Reserves policy target	70,000	66,438	47,258
No of months of operating expenditure	3.7	3.0	3.0
Free reserves over/(under) target	155,487	115,959	139,108

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Stop the Traffik	
If your organisation is part of a larger organisation, what is its name? Oasis Charitable Trust N/A	
In which London Borough is your organisation based? Lambeth	
Contact person: Miss Rachel Holmes	Position: Fundraiser
Website: http://www.stophetraffik.org/uk/	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1127321
When was your organisation established? 30/12/2008	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Making London Safer
Which of the programme outcome(s) does your application aim to achieve? More survivors of trafficking accessing quality specialist support to improve their safety, health and well-being and to beginning to reintegrate into society
Please describe the purpose of your funding request in one sentence. Funding a Regional Coordinator to coordinate information sharing and joint working for survivor support in the Tri-borough area (Kensington & Chelsea, Hammersmith & Fulham, Westminster).
When will the funding be required? 03/04/2017
How much funding are you requesting? Year 1: £55,886 Year 2: £53,521 Year 3: £58,078 Total: £167,485

Aims of your organisation:

STOP THE TRAFFIK (STT) believes in the inherent value and dignity of every human life. We believe no woman, man or child should be subject to the abuse and exploitation of human trafficking and modern slavery. Therefore, our aim is to educate, empower and inspire communities to prevent human trafficking and modern slavery, ending the global market of buying and selling of people.

STT, a registered charity, launched officially during the Bicentenary of the Abolition of the Slave Trade in 2007. We have almost 10 years' experience preventing modern slavery by working in partnership to disrupt criminal networks and build resilient communities. Though based in the UK, we work with vulnerable communities, volunteer groups, NGOs and statutory services across the world; empowering them to bring about systemic change in the fight against human trafficking. In the UK we have 25 voluntary groups, run by 135 volunteers committed to stop trafficking in their communities.

Main activities of your organisation:

- **Community Transformation:** We equip people to understand what trafficking is, how it affects them and how they can respond. We do this through volunteer-led campaigns, training vulnerable people, training organisations and coordinating cross-agency action. We establish networks of organisations in local areas to share information regarding potential trafficking trends and ensure there are no gaps in survivor care.
- **Global campaigning:** We equip and empower consumers to change their buying habits and campaign for change. We advocate for businesses to take action to prevent trafficking through monitoring their supply chain and practices.
- **Gathering and sharing knowledge:** We gather, analyse and share information from individuals and stakeholders around the world on how and where trafficking is taking place in order to enable effective prevention of human trafficking. Sharing of data regarding trafficking trends across the world will give greater insight into methods used by traffickers, allowing interventions to be created, victims to be identified and trafficking prevented.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
4	4	5	135

Property occupied by your organisation

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

Summary of grant request

The Need

Vulnerable people we work with are disadvantaged and marginalised due to conflict, economic crisis or poverty. They lack knowledge on human trafficking, consequently, traffickers prey on this vulnerability making false promises of a better future. The Home Office estimates there are 13,000 victims of trafficking in the UK, although in 2015 only 2,934 potential victims were referred to the National Referral Mechanism (NRM) in England.

In 2012 a Modern Slavery and Exploitation Forum (MSE), made up of NGOs, statutory services and community groups, was set up in the Tri-borough (Kensington/Chelsea, Hammersmith/Fulham and Westminster) area with funding from the European Commission. Over 2 years the project identified over 300 potential trafficking victims and 6 trafficking rings. The proposed project will build on the results and success of this project.

Project

The proposed project will ensure more survivors of trafficking in the Tri-borough area access information, advice and advocacy through activities led by a Regional Coordinator including:

1. Training frontline professionals to identify potential victims, report trafficking, and support survivors.
2. Coordinating information sharing and joint working of local organisations ensuring there are no gaps in provision for survivors.
3. Mobilising the MSE forum to share information on services and work together on initiatives/training.
4. Running risk-avoidance workshops for vulnerable communities, empowering them to identify and resist trafficking, and contact relevant information, advice and advocacy services to help them build resilience to trafficking.
5. Resourcing volunteers to run campaigns equipping local communities to identify potential trafficking and report it, e.g. nail bars, construction industry.
6. Evaluating and monitoring activities in line with our Theory of Change.

A part-time coordinator has been funded for 5 months, but further funding is required to increase impact and ensure more survivors are accessing quality care.

Outcomes

We would expect to see:

- Increased survivors accessing high quality specialist and longer term support, advice, advocacy and information to help them re-integrate back into society and reducing risk of re-exploitation.
- Increase number of potential victims identified and referred to the NRM.
- Increased community awareness to trafficking, thereby increasing their resilience and ability to identify potential situations of exploitation.
- Vulnerable individuals empowered to identify and resist trafficking through awareness of trafficking and accessing information, advice and advocacy which will increase their resilience.
- Front-line agencies upskilled to identify trafficking victims, support survivors and report trafficking.
- STT Voluntary group running local campaigns to help the wider community identify and report potential victims of trafficking.

Why STT

STT has a strong track record in collaborative effective partnerships. STT experience includes:

- 1) Successful model: The STT Regional Co-ordinator in Manchester, as part of the Modern Slavery Coordination Unit, has demonstrated the effectiveness of multiple stakeholders working together evidenced through the Greater Manchester Police referrals increasing by 197% in one year. STT were one of the delivery partners contributing to the success of the ECAT project.

- 2) Effective targeting: Through strong networks and partnerships, STT have identified specific groups most vulnerable to trafficking.
- 3) Experienced team: Our team has a wealth of experience including STT founding CEO awarded an MBE in honour of STT's achievements. Steve Chalke, STT founder, was appointed UN Special Advisor on Community Action Against Trafficking for the UN Global Initiative to Fight Human Trafficking.

Good practice

STT is reliant on volunteers raising awareness, running campaigns and engaging a range of audiences. STT welcomes volunteers from all backgrounds, we know diversity enhances the ability to connect with different communities. Feedback from vulnerable groups, volunteers and frontline professionals informs our training as their experiences provide greater knowledge and understanding.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

None

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Over 3 years, coordinate training delivery to 3,000 front-line professionals, ensuring they can identify service-users who may have been trafficked/at risk of trafficking, and implement processes in their workplaces to respond. This will increase the number of survivors identified in the Tri-borough area and referred to the National Referral Mechanism.

Coordinate MSE forum, ensuring joined up delivery of refuge provision, information, advice, advocacy services and representation for 50 identified trafficking survivors over 3 years. Through the forum the Regional Co-ordinator will ensure different areas of need are being provided for survivors identified, including housing, emotional and financial support.

Over three years, coordinate delivery of risk-avoidance training, safety advice and workshops to 1,000 vulnerable members of target communities e.g. young people, homeless people, refugees and migrants. The workshop will cover how to identify trafficking, how to resist it and how to contact support agencies for information, advice and advocacy.

Organise and facilitate quarterly meetings of the MSE forum, ensuring engagement outside of meetings, to build partnership between local law enforcement, local authorities, support agencies and community groups to collect data about local trafficking trends, consult with agencies about training needs, and create a community response to trafficking.

Recruit, train and support a local team of volunteers to run local campaigns to increase community knowledge of trafficking and how to identify and report possible victims. Provide and deliver risk avoidance workshop resources for use by partnership agencies engaging with vulnerable communities.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Increased identification, and referral, of victims to National Referral Mechanism by agencies in the MSE forum and wider community. Front-line professionals better equipped with skills and knowledge to identify and report trafficking in their context and support survivors appropriately.

Increased number of survivors of trafficking will have appropriate support to help them recover and integrate back into society. This will be through coordinated access to information, advice, and advocacy, thereby increasing resilience to resist opportunities of re-exploitation.

Vulnerable people (including young people, homeless people and refugees and migrants) are more resilient to trafficking as they are empowered to access information, advice and advocacy. They will have knowledge to identify risky situations for themselves and their peers, resist it, report it and inform other members of their community.

Increased number of trafficking rings are exposed and shut down through NGOs and statutory services sharing knowledge, pooling resources, joint initiatives and training which ensures beneficiaries are protected.

Increased awareness and reporting of trafficking resulting in communities benefitting from safer neighbourhoods free from exploitation and it's antisocial consequences that create instability.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes, we plan for this project to continue. Alternative funding sources will be sought. Evidence from this project will help prove the value of collaborative working, and hopefully encourage future investment and sustainable funding.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year? 2,017
In which Greater London borough(s) or areas of London will your beneficiaries live? Kensington & Chelsea (34%) Hammersmith & Fulham (33%) Westminster (33%)
What age group(s) will benefit? All ages
What gender will beneficiaries be? All
What will the ethnic grouping(s) of the beneficiaries be? A range of ethnic groups If Other ethnic group, please give details:
What proportion of the beneficiaries will be disabled people? 1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Staff Salary Costs	32,146	32,789	33,444	98,379
Staff Costs	8,000	6,218	6,338	20,556
Direct Project Costs	9,740	8,395	12,053	30,187
Central Functions (inc HR, IT, Finance, Health & Safety)	6,000	6,120	6,242	18,362
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	55,886	53,521	58,078	167,485
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
N/A	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Staff Salary Costs	32,146	32,789	33,444	98,379
Staff Costs	8,000	6,218	6,338	20,556
Direct Project Costs	9,740	8,395	12,053	30,187
Central functions (inc HR, IT, Finance, Health & Safety)	6,000	6,120	6,242	18,362
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	55,886	53,521	58,078	167,485
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Finance details

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

Financial year ended:	Month: August	Year: 2015
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Income received from:	£
Voluntary income	213,830
Activities for generating funds	7,392
Investment income	0
Income from charitable activities	7,436
Other sources	0
Total Income:	228,658

Expenditure:	£
Charitable activities	283,923
Governance costs	9,477
Cost of generating funds	8,803
Other	0
Total Expenditure:	302,203
Net (deficit)/surplus:	-73,545
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	8,000
Investments	0
Net current assets	88,491
Long-term liabilities	0
*Total Assets (A):	96,491

Reserves at year end	£
Restricted funds	30,797
Endowment Funds	0
Unrestricted funds	65,694
*Total Reserves (B):	96,491

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
21-30%

Organisational changes

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

During the past financial year (2015/16) STT was a seasonal fundraising partner of the Financial Times. These funds are committed to the growth of the Centre for Intelligence Led Prevention, with the spend indicated in the 2017 budget.

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	5,400
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	74,000

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Comic Relief	36,767	39,635	21,135
European Commission	0	26,481	0
	0	0	0
	0	0	0
	0	0	0

Declaration

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

Please confirm: Yes Full Name: **Rachel Holmes**

Role within **Fundraiser**
Organisation:

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MEETING: 20/09/2017

Ref: 14122

ASSESSMENT CATEGORY - Older Londoners

Marylebone Bangladesh Society Ltd

Adv: Sandra Davidson

Base: Westminster

Amount requested: £70,000

Benefit: Westminster

Amount recommended: £66,000

The Charity

Marylebone Bangladesh Society (MBS) was established in 1979 to promote the welfare of the Bangladeshi community in the Church Street Neighbourhood, North Westminster. It plays an active role in the area providing much needed social welfare support with a particular focus on educational and health needs. In addition to the Bangladeshi community MBS delivers services and support to a significant number of other minorities from N. Africa, Morocco, Somali, Eritrea; and growing numbers from Eastern Europe. Specifically, MBS provides the following: an advice and information service (approved by the Legal Services Commission); women's health and well-being activities; a supplementary school project which supports the core curriculum; mother-tongue classes and activities promoting partnership between parents and schools; a large youth club; and several outings and cultural events for all ages.

The Application

MBS has been working with older people since 2004. Over the last few years they have noted an increasing number of older people 75+ accessing their services, many of whom live alone and are isolated. Statistics published in the 2011 Census show:

- 11,307 people aged 75 and above living in Westminster
- 11,305 people aged 65 and above are living alone of which approximately 4,500 are aged 75 and above.

The project will also support carers aged 65 and over. The organisation is seeking funding for two years to build and expand its work with older members by recruiting an Older People's Project Development Worker to develop new activities that will improve health and well-being and support older people to become more active in their local community.

The Recommendation

MBS has a good track record of delivering services for older people and is recognised as being responsive to the needs of the local communities in which they operate. It works collaboratively with key partners and has a good relationship with its current funders. The project is well planned and a good fit for your outcomes on the Older Londoners programme. The original budget, which included costs for hiring their own premises, has been reduced accordingly after a discussion with your officer at assessment and a revised sum agreed. As the organisation's free reserves are low it is advised that their cashflow be reviewed ahead of the release of the second year's funding. A grant is advised as follows:

£66,000 over two years (2 x £33,000) for the salary costs of an Older People's Project Development Worker (28hwpw) and associated project costs for an Older People's Health and Well-being Project. Release of the grant in year 2 is subject to review of cashflow.

Funding History

Meeting Date	Decision
08/07/2010	£56,000 over two years (2 x £28,000) for an Older People's Health Project.

Background and detail of proposal

You have supported MBS before, most recently in July 2010 with a grant of £56,000 for an Older People's Health Project. The monitoring report of this was signed off as good. MBS is seeking to provide a range of activities to enhance the lives of older people backed by a comprehensive plan to increase physical activity, improve eating habits, increase participation, and reduce isolation. A large number of older people from BAME communities suffer from heart disease; diabetes, mental health and related illness resulting from isolation, depression and anxiety. The programme will offer practical and social support to older people at risk of social isolation, gradual loss of independence or reactive mental illnesses. A befriending service will be offered with the recruitment of 20 people trained to undertake over 200 befriending visits. Monthly healthy eating workshops will be held in addition to drop in support services. MBS runs its activities from two sites equipped for various functions and both sites can meet the needs of this project.

Financial Information

MBS has diversified its funding stream as a result of funding cuts by the local authority. The charity is looking at more room/hall hire opportunities to increase its unrestricted reserves position. The costs of generating funds are not disclosed in the accounts. Future plans include setting up a fund-raising sub-committee to look at ways of generating more unrestricted income and increasing its free reserves.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Examined	Draft Accounts	Forecast
	Accounts		
	£	£	£
Income & expenditure:			
Income	180,230	157,916	145,102
- % of Income confirmed@ 15/8/17	n/a	n/a	100%
Expenditure	(169,751)	(157,530)	(142,435)
Total surplus/(deficit)	10,479	386	2,667
Split between:			
- Restricted surplus/(deficit)	10,656	583	9
- Unrestricted surplus/(deficit)	(177)	(197)	2,658
	10,479	386	2,667
Cost of Raising Funds	0	0	0
- % of income	0.0%	0.0%	0.0%
Operating expenditure (unrestricted funds)	67,507	53,919	85,842
Free unrestricted reserves:			
Free unrestricted reserves held at year end	4,189	3,992	6,650
No of months of operating expenditure	0.7	0.9	0.9
Reserves policy target	33,754	26,960	42,921
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	(29,565)	(22,968)	(36,271)

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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Marylebone Bangladesh Society Ltd	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Westminster	
Contact person: Mr Lukman Ahmed	Position: Project Development Manager
Website: http://mbs-uk.org	
Legal status of organisation: Charitable company	Charity, Charitable Incorporated Company or company number: 1151593
When was your organisation established? 01/01/1979	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Older Londoners
Which of the programme outcome(s) does your application aim to achieve? Older Londoners aged 75 years and over living more active and healthier lives Fewer older Londoners aged over 75 years with depression and more reporting improved well-being
Please describe the purpose of your funding request in one sentence. We would like to improve the quality of life of local older people by making them active and connecting them with others.
When will the funding be required? 01/09/2017
How much funding are you requesting? Year 1: £35,000 Year 2: £35,000 Year 3: £0 Total: £70,000

Aims of your organisation:

Marylebone Bangladesh Society (MBS) plays a very active role in the area providing much needed support in the areas of social welfare, educational and health needs of the wider community.

The aim of MBS is:

- To promote or assist in the provision of facilities and other leisure time occupation of the local residents in the City of Westminster.
- MBS promotes education, good race relations by endeavouring to eliminate discrimination on grounds of race and encouraging equality of opportunity between persons of different backgrounds.

Our services are open to people of all backgrounds. Almost 50% of the users are now from the BME Communities in particular people of Arabic speaking backgrounds and those from Eastern European background.

Main activities of your organisation:

Current Activities:

1) Advice and Information Service - Providing high quality welfare advice service, information and support on benefits, housing matters, debt, consumer matters, education particularly on school transfers, exclusions.

2) MBS Supplementary School - Teaching core curriculum subjects according to National Curriculum

3) MBS Youth Club - provides a generic youth work with a more social educational focus in the North Westminster area.

Other activities are: Women's Tea/Coffee Mornings; Health Information workshops; Physical activities for all ages; Annual Summer Sports Day; Outings and trips; Cultural Events and Celebration of national days of significance of the Bangladeshi and Arabic speaking communities.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
0	9	9	14

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	13 years

Summary of grant request

Recently published Ward Profiles by local NHS and Council shows: Church Street ward amongst the 10-20% most deprived neighbourhood in the country along with Queen's Park; Westbourne Park and Harrow Road wards from where most of our users come from with high number of overcrowded and poor housing; female life expectancy is 10 years less than other areas and male is 17 years; high number of people in bad health many with long term illness; poor use of local swimming pools; high number of people experiencing isolation in particular amongst women, older people, and the newly settled; over 50% of the population are from BAME and refugee backgrounds; 44% of over 65 live alone; 45% of over 60s claim pension credits. From our survey (2015) of local families, most people told us:

- There are few places for older people to meet and develop social networks.
- Older residents in the area have complained of vandalism, petty crime, drunken behaviour and noise particularly at night. (Council's City Survey showed the same)
- Many older people experience fear and therefore do not always leave their home

A large number of older people from minority ethnic communities suffer from heart disease; diabetes; mental health related illness resulting from isolation, depression and anxiety; many are smokers; most are inactive and not involved in any physical activities and have a unhealthy diet.

Our project will be an Older People's health orientated programme that will enhance the lives of disadvantaged, vulnerable and sick, poverty affected elderly men and women aged 65 years and above particularly from the minority ethnic communities (Bangladeshi and Arabic Speaking) in particular who are at risk of social isolation or gradually losing their independence. The project will be open to all public irrespective of their background, race, and faith etc. In year 1 we anticipate in working with at least 80 older people aged 65+ years.

Through this project we aim to:

- Maximise active life and independence of older people by proactively reducing social isolation.
- Improve physical health and mental health through increased socialisation and participation in activities.
- Ensure that older people have access to a continuation of services that promotes their independence, health and well-being.

We will fulfil the project by:

- ? Providing a variety of social, educational and leisure activities that promotes the physical and emotional well-being through a better healthy lifestyle of sick and disadvantaged elderly people in a welcoming, safe and comfortable environment.
- ? Offering assistance and guidance with practical matters that influences an older person's ability to function independently in the community and hence reduce isolation and loneliness that leads to mental health problems.
- ? Involving older people in the development of the service and seek their views on its quality.
- ? Linking up with appropriate agencies (Housing, Health, Social Welfare) to help older people address any housing, health and welfare issues that are causing them concern.
- ? Recruiting and training volunteers to provide home visits, befriending service and assist with project delivery

Our organisation is well set up to deliver this project. We are led and managed by Trustees living in grass root communities, 8 of them have their own businesses and are also trustees in other similar community organisations delivering in other parts of London and 1 was a former local Councillor. We have been successfully delivering quality services focused around education, welfare, community development and health to the local communities in Westminster for over 35 years. We have 2 centres in the area, Achieved Advice Quality Standard Quality Mark and have over 250 people using our services every week.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

We currently hold Advice Quality Standard (AQS). We are also working towards London Youth Bronze Level for our Youth Club which should be achieved by July.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

3 x exercise and fitness sessions each week (each session lasting for two hours). 2 Sessions for men and 1 Session for Women. A total of 288 sessions. Will include Aerobics, Walking, Circuit, Step Exercise, In-House Gym, Swimming sessions. 12 people to attend each session.

Train 20 people as Volunteers/Befrienders who will perform upto 6 hours of volunteering and Befriending support a week to isolated older people and also providing assistance with the delivery of activities.

6 x Health promotional Community Events with themes such as Chronicle Heart Disease, Benefits of Exercise and Fitness, Improving Access to Healthcare Services, Fall Prevention. Speakers will be present with questions/answer session, debates, provide information to raise awareness on health matters. 30 older people to attend each event.

288 x Day Centre/Drop in Support Services where they meet new people and socialise have tea/coffee and play traditional games, watch video, access internet, etc. Older People's Worker available to provide advice and information on the changing welfare related issues and assistance with translation and interpreting. 10 people each session.

20 x Monthly Healthy Eating Workshop Sessions providing practical advice and guidance on eating a healthy diet, guidance on nutrition, how to cook tasty balanced meals on a small budget. 15 people to attend each session.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Improvement in physical health and mental health of older people through increased uptake of physical activities. Enable users to understand the benefits of fitness and exercise as a way to tackle illness and sickness. It will enable them to build/maintain their independence, strength, balance, flexibility, and endurance.

To provide upto 2880 hours of volunteering and befriending support a year helping reduce isolation in the community. By volunteering, they will be able to improve their skills; knowledge and experience which will help them get into employment.

Older people and members of the health, social care and voluntary sector agencies will get opportunity to meet and discuss health issues of older people. Increased awareness and knowledge of wider health issues and how to tackle ill health. Also improve access to information on local community health services.

Reduced isolation and loneliness of marginalised sections of the community through participation in social activities -- becoming less housebound and less chances of experiencing mental health problems. Increase income and awareness of their welfare rights which will enable them have more security, self confidence.

Healthier diet and eating habits of older people -- will also reduce obesity, promote healthier eating, improve their cooking skills, increased uptake of fruit and vegetable in their diet for example eating 5 a day of fruit/vegetables.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes. We will continue to apply to other grant making bodies and also try to increase our hall hire income.

Who will benefit?

About your beneficiaries

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

80

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

Westminster (100%)

What age group(s) will benefit?

65-74

75 and over

What gender will beneficiaries be?

All

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

Asian/ Asian British (including Indian; Pakistani; Bangladeshi; Chinese; Any other Asian background)

Other ethnic group

If Other ethnic group, please give details: **Arabic Speaking**

What proportion of the beneficiaries will be disabled people?

21-30%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary Costs of Older People's Project Development Worker Salary Scale: NJC -- Scale 6: Pro Rata -- 28 Weeks Per Week	21,497	22,141	0	0
Employers NI Costs	1,785	1,838	0	0
Sessional Staff -- Health & Fitness Adviser (£40 per 2 hrs session x 3 sessions x 48 Weeks) (swimming instead will cost same)	5,760	5,760	0	0
Venue Hire Contribution	4,000	4,000	0	0
Publicity and Promotion -- Leaflet Printing	300	300	0	0
Workshop and Activity Costs Facilitator's Fees Refreshments Information Training Support to people who become volunteers/befrienders + expenses	3,500	3,500	0	0
Outings and Festive events x 3	1,800	1,800	0	0
Management, supervision and admin (phone, stationary etc) costs	3,500	3,500	0	0
	0	0	0	0
TOTAL:	42,142	42,839	0	0

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Marylebone Bangladesh Society -- hall/room hire income	2,397	2,839	0	0
TOTAL:	2,397	2,839	0	0

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
Drapers Charitable Foundation	4,745	0	0	0
Other Charities and Trusts (to be applied)	0	5,000	0	0
TOTAL:	4,745	5,000	0	0

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary Costs of Older People's Project Development Worker Salary Scale: NJC -- Scale 6: Pro Rata -- 28 Weeks Per Week	21,497	22,141	0	0
Employers NI Costs	1,785	1,838	0	0
Sessional Staff -- Health & Fitness Adviser (£40 per 2 hrs session x 3 sessions x 48 Weeks)	1,015	760	0	0

(swimming instead will cost same)				
Venue Hire Contribution	4,000	4,000	0	0
Publicity and Promotion -- Leaflet Printing	300	300	0	0
Workshop and Activity Costs Facilitator's Fees Refreshments Information Training Support to people who become volunteers/befrienders + expenses	3,500	3,500	0	0
Outings and Festive events x 3	1,800	1,800	0	0
Management, supervision and admin (phone, stationary etc) costs	1,103	661	0	0
	0	0	0	0
TOTAL:	35,000	35,000	0	0

Finance details

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

Financial year ended:	Month: March	Year: 2016
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Income received from:	£
Voluntary income	121,318
Activities for generating funds	0
Investment income	58,912
Income from charitable activities	0
Other sources	0
Total Income:	180,230

Expenditure:	£
Charitable activities	169,751
Governance costs	0
Cost of generating funds	0
Other	0
Total Expenditure:	169,751
Net (deficit)/surplus:	10,479
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	2
Investments	0
Net current assets	21,367
Long-term liabilities	0
*Total Assets (A):	21,369

Reserves at year end	£
Restricted funds	17,180
Endowment Funds	0
Unrestricted funds	4,189
*Total Reserves (B):	21,369

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
31-40%

Organisational changes

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

No changes

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	36,462	35,826	29,260
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	12,700	26,150	17,180

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
John Lyon's Charity	25,000	26,650	0
People's Health Trust	16,276	9,494	0
BBC Children in Need	9,845	9,680	9,598
Henry Smith Charity	0	0	15,600
Lloyds Bank Foundation	0	0	13,356

Declaration

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

Please confirm: Yes Full Name: **Lukman Ahmed**

Role within **Project Development Manager**
Organisation:

MEETING: 20/09/2017

Ref: 14141

ASSESSMENT CATEGORY - Reducing Poverty

FoodCycle

Adv: Ciaran Rafferty

Base: Lambeth

Amount requested: £87,500

Benefit: London-wide

Amount recommended: £87,000

The Charity

FoodCycle, a national charity, was founded in 2009 by a young man who wanted to tackle both food poverty and social isolation using a local-community approach. His concept hinges on a triple-donation model of food, time and place. A local organisation volunteers the use of its kitchen once or more per week; the charity arranges for surplus food to be collected from local supermarkets; and a team of volunteers cooks and provides a healthy meal for up to 50 disadvantaged people in the neighbourhood. As well as providing nourishing food for those in need, the meal is a chance for people to have some company. The charity has won a series of awards including: Big Society Award 2011; and Best Community Initiative at the Climate Week Awards 2014.

The Application

This application is to continue, for a further two years, work funded by a three-year grant from your Committee in September 2014. FoodCycle's work is unique and London-wide and, as such, is eligible to be considered for a further two years' funding. Specifically, this application is for the salary of a London Projects Manager and for costs for training volunteers, so that the services provided in the capital can be of the highest quality and impact. The charity operates 9 projects in London with another 4 on the way – hence the need for a dedicated post to provide good operational management and support on the ground.

The Recommendation

This is an impressive organisation which achieves much through donations of food, time and place. With a rise in the number of people who rely on food banks or who are increasingly spending more of their income on food, FoodCycle brings much-needed assistance whilst also reducing food waste and tackling social isolation, particularly amongst the elderly. The work you have funded to date has been successfully monitored and has delivered consistently good outcomes. Your funding is advised as follows:

£87,000 over two further and final years (£43,000; £44,000) for the salary of a f/t London Projects Manager and volunteer training costs.

Funding History

Meeting Date	Decision
25/09/2014	£122,200 over three years (£37,600; £38,900; £45,700) for expansion of FoodCycle's work in London.

Background and detail of proposal

The FoodCycle model supports those living in food poverty but in a social and non-stigmatised way. Many people – particularly the older generation - are ashamed to use food banks and would rather go without but they are happy to go along to a FoodCycle community dinner as they are promoted as social events and encompass people of all ages living in the same neighbourhood. Monitoring of projects and their clients (called guests) shows that they often have multiple – and commonly inter-related - challenges (eg poor mental and physical health, low income, living alone). Your funding for a further two years will enable the charity to provide more intensive support to the London cohort of venues (soon to number 13) and enable the guests to access other support services that they might need.

Financial Information

The cost of generating funds in 2015/16 included £36,000 to stage a one-off gala event (which generated c£80k in income) and also included c.£23,000 for franchising costs. In subsequent years franchising costs have been accounted for within charitable activities hence the cost of raising funds now being lower in those years. The level of free reserves held is above the policy although the charity has plans to use some of these, if necessary, in expanding its operations in the north of England; and for any costs arising from restructuring to a more effective management model.

Year end as at 31 August	2016	2017	2018
	Examined Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	693,677	576,480	590,848
- % of Income confirmed	n/a	99.00%	62%
Expenditure	(593,706)	(536,541)	(590,574)
Total surplus/(deficit)	99,971	39,939	274
Split between:			
- Restricted surplus/(deficit)	4,568	18,150	23,612
- Unrestricted surplus/(deficit)	95,403	21,789	(23,244)
	99,971	39,939	368
Cost of Raising Funds	144,241	55,733	65,000
- % of income	20.8%	9.7%	11.0%
Operating expenditure (unrestricted funds)	357,515	257,253	266,896
Free unrestricted reserves:			
Free unrestricted reserves held at year end	268,795	290,584	267,340
No of months of operating expenditure	9.0	13.6	12.0
Reserves policy target	197,902	178,847	196,858
No of months of operating expenditure	6.6	8.3	8.9
Free reserves over/(under) target	70,893	111,737	70,482

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: FoodCycle	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Lambeth	
Contact person: Ms Mary McGrath	Position: Chief Executive
Website: http://foodcycle.org.uk/	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1134423
When was your organisation established? 10/12/2009	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Reducing Poverty
Which of the programme outcome(s) does your application aim to achieve? Fewer Londoners experiencing food poverty
Please describe the purpose of your funding request in one sentence. Strengthening and deepening the impact of FoodCycle meals on the lives of Londoners in food poverty, through a dedicated London projects manager and volunteer training.
When will the funding be required? 01/09/2017
How much funding are you requesting? Year 1: £43,536 Year 2: £43,963 Year 3: £0 Total: £87,500

Aims of your organisation:

- 1) Strengthen communities, by bringing people together around a healthy meal and creating opportunities to talk, exchange and build lasting relationships.
- 2) Encourage friendships, by creating spaces for people from all backgrounds and walks of life to have fun together, to share experiences and to meet new people.
- 3) Improve nutrition and reduce hunger, by cooking healthy meals for those in need and sharing essential information on food and nutrition.
- 4) Change attitudes to food to reduce food waste, by using surplus food and spreading our passion for food and the environment.

Main activities of your organisation:

FoodCycle provides nutritious and tasty three course community meals for people at risk of poverty and isolation. We are nationwide with 1/3 of our projects in London. Our key activities:

- 1) Collecting surplus food: volunteers collect food deemed as waste from local supermarkets, markets and shops, increasing their understanding of food waste in the capital.
- 2) Cooking nutritious meals: those volunteers take the food to a local community kitchen, and "Ready Steady Cook" turn a mountain of random foods into a delicious, healthy, fruit and veg packed, three-course meal.
- 3) Guests come together over good food: Local people, who may be hungry or not eating well, come together as a community to sit and eat. Meals are open to anyone. And at the end, guests can take away boxes of cooked food and more surplus food to cook during the week.
- 4) Volunteers are recruited, trained and supported to deliver their community meal every week throughout the year.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
7	2	7	2,000

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Rented	2 years

Summary of grant request

The need:

2.3M people in London live in poverty; the lowest income earners, spend 1/4 of their weekly budget on food, leading to poor nutrition, poor health and healthcare costs 121% higher than those who are food secure.

110,000 emergency food parcels were given out in London in 2016, but 64% of elderly people are ashamed to access foodbanks.

FoodCycle guests are vulnerable and have multiple challenges such as poor mental health (34%), long term physical health condition (38%) very low income (44%) or living alone (49%). Our volunteers need training to better support their needs.

Our guests are unaware of other London FoodCycles/ other services in their area. Some are unsure of what to do with the extra surplus ingredients we give them, which will help feed them throughout the week.

To date our staff have managed projects across the country.

What we will deliver:

With 9 London FoodCycle projects and 4 planned before September 2017, we have learned much. We now want to further our development by deepening our impact whilst steadily increasing project numbers. We are implementing a regional model, starting with a London Project Manager.

They will create a stronger service for guests by visiting the projects more often to spot issues faster, and take up new opportunities. They will do outreach work through collaboration with other charities, to bring new guests to our projects, as well as opening a further four new FoodCycles.

They will develop our signposting, both to our services, to other services, and to a better relationship with food, for example through recipe cards, or invited speakers.

We will support our guests more by training volunteers in safeguarding, mental-health first aid, first-aid and nutrition.

Our aim:

To do more to support our guests in food poverty: enhance guests' knowledge of food and nutrition; increase guest numbers and opening a further four new Projects.

Guests will access more services, and volunteers will be better able to cater to complex needs.

We are the right people:

Our method is tried and tested -- we provided 37,000 meals last year and gave guests 8,000 Tupperware boxes of food and surplus ingredients. The meals are healthy and filling and guests say they cook more healthily at home as a result.

We have a great relationship with all major supermarkets, both head office and local.

And we are financially sustainable, maintaining strong reserves, with diverse income streams.

We reduce food poverty:

Our guests are in food poverty. 42% say they use food banks, two thirds skip meals. Over half worry their food will run out because they don't have enough money.

We serve three-course meals. Those meals are nutritious, filled with fruit, veg, fibre and protein. We will enhance knowledge of food with specialists such as cardiac nurses and diabetes professionals joining the meal.

Best practice:

We involve service users as volunteers in the kitchen and hosting. Others prefer to be guest ambassadors, halfway between a guest and a volunteer, taking the register, making tea, or stacking chairs at the end. They shape our projects with advice and regular feedback.

Our meals are open to all, and we work hard to reach out through varied channels to make our meals diverse and welcoming.

We value and support volunteers through extensive training, dedicated professional

support, and simplified IT systems. We recognise their great work through annual awards and on our internal and external social media.

We are very green! We use food that would have gone in the bin -- a terrible waste, and most of our projects collect food on foot, bike, or using public transport.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

none

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Guests in food poverty will continue to be treated to delicious, nutritious, filling weekly meals at FoodCycles across London. We will provide 32,000 meals for Londoners over the next two years. (15,000 in year 1 and 17,000 in year 2). The London Project Support Manager will support the continued delivery of these meals, working to strengthen relationships with surplus food suppliers, venues or franchise partners, and guests.

Guests can choose food to take away, both cooked food in Tupperware, and surplus ingredients. The London Manager will help maximise both the volume and utility of ingredients and cooked food being taken home from meals, through advising volunteers on best practice, and disseminating nutrition and cooking advice to guests.

Staff and volunteer training will mean guests are better supported. The Manager will train London Volunteer Leaders (c80) in safeguarding and mental health first aid. New volunteer leaders (c40) will do food safety training level 2, and we will provide First Aid Training for approximately 45 Volunteer Leaders per year.

Guests will learn about other opportunities to reduce their food poverty. The Manager will organise signposting of guests to other services and opportunities, including other FoodCycle meals and volunteering with FoodCycle, by providing London specific materials at meals and by inviting other organisations to interact with our guests.

Londoners will have new opportunities to attend a healthy, hearty FoodCycle meal. The London Manager will do targeted outreach, both online, paper and in-person, e.g. getting our meals in homeless directories and GP referral sheets, or speaking at community events. They will also open two new projects each year.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Our guests in food poverty will eat well in a way that protects their dignity both at the meal and throughout the week. They will have new food experiences, enhancing their lives, and helping them experience food as joyful rather than stressful, and feel more confident in cooking at home.

The work of the London Manager means that guests will benefit from a more stable service, with closer professional oversight, and more opportunity to provide feedback, improving their experience of attending meals with FoodCycle.

Volunteer training means guest's needs are better recognised and dealt with appropriately and safely. Volunteers will feel empowered to react appropriately, whether to a dietary requirement or a mental-health need. When volunteers understand guests and guests feel heard, this results in a stronger community and a stronger service.

Signposting means guests will access more services, particularly those addressing their food poverty. It means they will attend more FoodCycle meals, and more will volunteer. This will result in our guests getting more support and reducing their food poverty.

Outreach will increasing the number of people accessing our meals and eating well, both in current and new locations across London, so more people in food poverty will be supported. We are aiming for 80% capacity at current projects and to expand to 17 projects by August 2019.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes - we envisage the London Project Support Manager role as a permanent one. We will fund it via applications to other major trust funders and through further growth of corporate sponsorship.

Who will benefit?

About your beneficiaries

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

1,700

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

London-wide (100%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

21-30%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
London Project Support Manager and training	32,956	33,100	0	66,056
Other London project staff costs	26,796	27,600	0	54,396
Outreach materials	2,000	2,000	0	4,000
Other London project activity costs	11,367	11,367	0	22,734
Travel to projects	2,248	2,360	0	4,608
Volunteer training	4,375	4,506	0	8,881
Volunteer conference	5,520	5,520	0	11,040
Other volunteer costs including VMS	4,448	4,448	0	7,648
Head office costs	8,971	9,090	0	18,061

TOTAL:	98,681	99,991	0	198,672
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
The Royal Wildlife Trust	18,918	7,556	0	26,474
Leathersellers	15,000	0	0	15,000
Franchise Fees	5,000	7,500	0	12,500
Small trusts and foundations	5,648	0	0	5,648

TOTAL:	44,566	15,056	0	59,622
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
none	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
London Project Support Manager and training	32,956	33,100	0	66,056
Travel to projects	2,248	2,360	0	4,608
Volunteer training	4,375	4,506	0	8,881
Head office costs	3,958	3,997	0	7,955
	0	0	0	0
	0	0	0	0

TOTAL:	43,536	43,963	0	87,500
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Finance details

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

Financial year ended:	Month: August	Year: 2016
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Income received from:	£
Voluntary income	410,546
Activities for generating funds	132,260
Investment income	1,187
Income from charitable activities	65,245
Other sources	688
Total Income:	609,926

Expenditure:	£
Charitable activities	430,526
Governance costs	0
Cost of generating funds	118,631
Other	0
Total Expenditure:	549,157
Net (deficit)/surplus:	60,769
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	60,769

Asset position at year end	£
Fixed assets	3,351
Investments	0
Net current assets	229,003
Long-term liabilities	0
*Total Assets (A):	232,354

Reserves at year end	£
Restricted funds	54,355
Endowment Funds	0
Unrestricted funds	177,999
*Total Reserves (B):	232,354

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

Sophie Tebetts joined FoodCycle as Head of Programmes in December 2016. She comes with a wealth of experience in terms of volunteer management, CRM, Social Media as well as running a start up business Salad Days.

We are currently restructuring the programmes team with a move towards regional management as against a centralised team, ensuring our projects are more supported on the ground

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Royal Wildlife Trust	0	0	162,317
Tudor Trust	30,000	30,000	30,000
Henry Smith Charity	25,000	25,000	25,000
John Ellerman	30,000	0	0
Garfield Weston	0	30,000	30,000

Declaration

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

Please confirm: Yes Full Name: **Mary McGrath**

Role within **Chief Executive**
Organisation:

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MEETING: 20/09/2017

Ref: 14133

ASSESSMENT CATEGORY - Reducing Poverty

Island Advice Centre (IAC)

Adv: Kate Moralee

Base: Tower Hamlets

Amount requested: £148,085

Benefit: Tower Hamlets

Amount recommended: £148,000

The Charity

Island Advice Centre, (IAC) based in Cross Harbour Tower Hamlets, has provided legal advice in Welfare Benefits and Housing for 25 years. It held a Legal Aid Social Welfare Contract until 2012, has since been funded by BIG Lottery to deliver some Welfare Benefits case work and saw its Legal Aid Housing Contract end in 2015. It is well known and respected in the local area, holding regular contracts for the provision of advice with Tower Hamlets BC and with East End Community Foundation for a Rent Arrears Project currently.

The Application

The Trust is asked to support a full time welfare benefits caseworker to carry a case work load providing specialist advice to clients with complex cases and appeals, to train and supervise a team of law students to provide support to clients and to establish social policy as a key area of work raising and sharing issues with Department of Work and Pensions, Job Centre Plus and the Local Authority on the impact of policy and practice on clients.

The Recommendation

This is a well led organisation with an excellent reputation delivering complex welfare benefits and housing case work including appeals and attending tribunals and court cases. It complements other services in the locality maintaining its speciality and expertise of providing Legal Advice. IAC has had to respond to the removal of Legal Aid for Welfare Benefits and Housing cases since 2012, massively reducing its capacity to deliver legal case work. This proposal is in response to the increased demand (5 fold of their capacity to deliver currently) and increased complexity of cases and vulnerability of clients as a result of the impact of Welfare Reform and changes to Housing Benefit Allowances, alongside other stresses that individuals are facing. This proposal is recommended:

£148,000 over 3 years (£48,600, £49,400 £50,000) for a f/t Welfare Benefits Case Worker, associated costs and costs for training and supporting volunteers.

Funding History

Meeting Date	Decision
24/09/1998	Rejected as did not meet funding priorities.

Background and detail of proposal

Island Advice Centre has had to adapt to the loss of its Legal Aid funded Social Welfare Contract in 2012. It was initially successful in securing some Big Lottery funding to deliver advice services on welfare benefits, which ceased in 2016, as did any Legal Aid for the provision of Housing related case work. IAC is currently in receipt of a 3 year grant from Tower Hamlets LA to provide a variety of advice

services to local people and has a strong relationship and reputation for delivery of quality services. Therefore the charity is confident of retaining this funding for as long as it is available. However this contract only allows for the provision of 98 days per year (2 days per week) of specific Welfare Benefits Case Work. IAC currently subsidises this with one additional day per week, funded from its reserves.

IAC is also in receipt of a grant from East End Community Foundation for a Rent Arrears project (to offset the impact of losing the ability to provide Housing Case Work – supporting individuals at risk of or experiencing homelessness). It also provides advice in debt management. This project works to complement and strengthen existing services, by providing additional capacity for Welfare Benefits case work to reduce and alleviate poverty by maximising income. The organisation provides complementary services holistically for its clients.

With Welfare Reform, including Benefit Cap, Sanctions, Local Housing Allowance and the roll out of Universal Credit (Feb 2017 in Tower Hamlets) the number of individuals presenting with complex cases and increasing vulnerability has risen, with demand being 5 fold of current capacity to deliver. People are also presenting with increased mental health issues and confusion about the benefit system changes.

The Welfare Benefits Case Worker will increase capacity by carrying their own case load as well as training and supervising Law Student volunteers to be able to carry less complex case loads and provide support for the complex case loads, thus utilising resources to their maximum benefit.

Without increased capacity IAC predicts more repossession of homes, more people destitute, increased poverty, increased stress and mental health issues, increased homelessness and rough sleeping and ultimately more deaths. There are no other services in the area with the level of expertise of IAC to provide casework with welfare benefit appeals.

Financial Information

IAC has experienced reducing income since 2012 due to the loss of Legal Aid Social Welfare Contracts, originally partially replaced by Big Lottery funding which ended in 2016. However it has an excellent reputation with local funders and the Local Authority and has responded well to the loss of income by reducing expenditure accordingly. IAC has free reserves above their current reserves policy and is investing in funding a trainee post in welfare rights.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Audited Accounts	Draft Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	521,996	334,109	294,525
- % of Income confirmed @22/6/17	n/a	n/a	100%
Expenditure	(504,885)	(333,298)	(340,969)
Total surplus/(deficit)	17,111	811	(46,444)
Split between:			
- Restricted surplus/(deficit)	4,766	0	(24,094)
- Unrestricted surplus/(deficit)	12,345	811	(22,350)
	17,111	811	(46,444)
Cost of Raising Funds	0	3,400	3,500
- % of income	0.0%	1.0%	1.2%
Operating expenditure (unrestricted funds)	192,927	132,777	136,107
Free unrestricted reserves:			
Free unrestricted reserves held at year end	117,778	118,589	72,145
No of months of operating expenditure	7.3	10.7	6.4
Reserves policy target	126,221	83,325	85,242
No of months of operating expenditure	7.9	7.5	7.5
Free reserves over/(under) target	(8,443)	35,265	(13,097)

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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Island Advice Centre	
If your organisation is part of a larger organisation, what is its name? NO	
In which London Borough is your organisation based? Tower Hamlets	
Contact person: MS STEPH DICKINSON	Position: CENTRE MANAGER
Website: http://www.island-advice.org.uk	
Legal status of organisation: First Contact	Charity, Charitable Incorporated Company or company number: 1076857
When was your organisation established? 23/05/1997	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Reducing Poverty
Which of the programme outcome(s) does your application aim to achieve? More Londoners with improved economic circumstances More people accessing debt and legal services
Please describe the purpose of your funding request in one sentence. To increase the capacity of IAC to provide Welfare Rights legal advice and casework, develop social policy work and upskill local volunteers.
When will the funding be required? 02/10/2017
How much funding are you requesting? Year 1: £48,632 Year 2: £49,358 Year 3: £50,095 Total: £148,085

Aims of your organisation:

Island Advice Centre (IAC) was founded on the Isle of Dogs in 1987 to provide free, confidential, independent and friendly advice to local residents on a range of issues including welfare benefits, housing, debt, consumer and legal rights.

The aims of IAC are to:

- Enabling those clients most in need to secure their statutory rights and entitlements
- Empowering local residents by increasing their awareness of changes
- Improving skills of local volunteers by providing training and volunteering placements

Main activities of your organisation:

Our main activities are carried out in our office on the Isle of Dogs with outreach advice session delivered in a number of venues. Services we deliver include:

- specialist advice, casework and representation in housing, welfare rights, and debt/money management advice;
- generalist advice provided at open door sessions;
- advice sessions in 5 local GP surgeries;
- advice sessions in 2 local voluntary agencies
- daily appointments;
- telephone and email advice;
- training course and placements for volunteer advice workers to achieve NVQ Level 3& 4 in Advice & Guidance;
- volunteering opportunities for admin work;
- peer support and capacity building to other frontline community advice centres
- chair Tower Hamlets Community Advice Network - co-ordinating social policy issues borough-wide
- facilitate THCAN website - producing factsheets and templates for borough advice providers

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
2	10	7	20

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	3 years

Summary of grant request

The need for the project has arisen due to the cumulative impact of the Welfare Reform Act 2012 which introduced a programme to reshape the provision of welfare benefits. The roll out of the changes has meant existing and potential claimants struggling to either retain their benefits or navigate the new process to claim. This is exacerbated by the cuts to legal aid which removed funding from most areas of social welfare law including welfare benefit. We estimated that this has reduced our capacity by approximately 100 cases a year.

To respond to this demand we are seeking funding to employ a full time welfare benefits caseworker who will deliver three specific objectives:

- ? To provide specialist advice to clients with complex cases and appeals
- ? To train and supervise a team of law students and community volunteers to accompany clients to tribunals
- ? To establish social policy as a key area of work to raise issues of concern with DWP, JCP and the local authority on the impact of policy and practice on clients.

We have a track record in achieving outcomes for our clients. In 2015/16 a total of £596,562 was secured for clients in new/increased income. 90 appeals were heard resulting in 73 (81%) achieving a successful outcome.

IAC convene the Benefits Liaison Forum which brings together Housing Benefits & Council Tax staff in Tower Hamlets Council with local benefits advisors to discuss policy and practice. Advisors have the opportunity to make the Council aware of the impact on local residents. We want to enhance our influence in this area by the developing stronger research and social policy to better campaign for the rights of clients.

IAC will meet the following Reducing Poverty outcomes:

- ? More London with improved economic circumstances through the provision of specialist advice enabling people to mitigate delays and avoid the need to appeal a decision. Through our training of local volunteers we are able to develop the skills and employability of local people and improving their life chances in securing work.
- ? More people accessing debt and legal services by accredited organisations early resolution of benefit issues will enable clients referred to our debt advisors to more effectively negotiate with creditors from a position of better financial certainty

How meets the Trust's principle of Good Practice

- ? Involve service users Comments received help to inform and shape the way future services are delivered. In terms training volunteers an evaluation is done at the end of training and feedback received from the session supervisor during placements.
- ? Welcome people from all backgrounds and value diversity Our offices have good disabled access and we offer home visits to those people within Tower Hamlets who are housebound or otherwise unable to come to the office. We are able to provide the service in a range of languages including, Bengali, Somali, French, Vietnamese, Russian and Latvian.
- ? Value and support volunteers We have a track record of providing placements for law students, delivering accredited training for local volunteers to increase their skills, improving employability and future job opportunities. A number of those who were previously volunteers have been successful in securing paid positions either with IAC or other advice agencies
- ? Reduce carbon footprint IAC works hard to ensure that as much of our service delivery is done in a way which has minimal impact on the community. Our building Island House has the Green Mark Certificate and practices recycling, paperless working in offices to reduce unnecessary printing, case files are stored electronically instead of paper files.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

Specialist Quality Mark - 2015

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

To provide legal advice and casework appointments to clients submitting mandatory reconsideration requests and appeals - minimum of 200 cases per year

To provide representation at appeal tribunals - minimum of 20 per year

To provide casework supervision and training to 8 volunteer advisors a year

To establish a strong evidence base to enable IAC to advocate on behalf of clients on the impact of the welfare reforms

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Increased personal and family income by assisting clients in reinstating benefit entitlements, or by new or increased payment of benefits

Reduced level of financial vulnerability for clients. Clients will have increased capability to manage their affairs better.

Reduced level of reliance on foodbanks

Increase in skills level for volunteers who will increase their knowledge and understanding of welfare benefits entitlement and how to achieve it, have better interviewing, drafting and advocating skills

Improved capacity of the organisation to gather evidence and measure impact of specialist advice provision. Social policy work and key learning will be used to increase awareness of key stakeholders.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

During the course of the project we will be developing a fundraising strategy to ensure that the project will be continued.

Who will benefit?

About your beneficiaries

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

208

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

Tower Hamlets (100%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

71-80%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary of full-time welfare rights caseworker	34,666	35,186	35,714	105,566
Admin, finance and management salaries	7,717	7,833	7,950	23,500
Rent and services	2,706	2,746	2,787	8,239
Other fixed overheads	1,066	1,081	1,097	3,244
Volunteer expenses	238	241	244	723
Equipment, phones, postage	574	582	590	1,746
Training, publications, subscriptions	619	628	637	1,884
Other variable overheads	457	463	469	1,389
Legal/audit	589	598	607	1,794

TOTAL:	48,632	49,358	50,095	148,085
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary of full-time welfare rights caseworker	34,666	35,186	35,714	105,566
Admin, finance and management salaries	7,717	7,833	7,950	23,500
Rent and services	2,706	2,746	2,787	8,239
Other fixed overheads	1,066	1,081	1,097	3,244
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Other variable overheads	457	463	469	1,389
Legal/audit	589	598	607	1,794

TOTAL:	48,632	49,358	50,095	148,085
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Finance details

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

Financial year ended:	Month: March	Year: 2016
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Income received from:	£
Voluntary income	25,004
Activities for generating funds	0
Investment income	193
Income from charitable activities	496,799
Other sources	0
Total Income:	521,996

Expenditure:	£
Charitable activities	504,885
Governance costs	0
Cost of generating funds	0
Other	0
Total Expenditure:	504,885
Net (deficit)/surplus:	17,111
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	17,111

Asset position at year end	£
Fixed assets	5,075
Investments	0
Net current assets	121,093
Long-term liabilities	0
*Total Assets (A):	126,168

Reserves at year end	£
Restricted funds	8,390
Endowment Funds	0
Unrestricted funds	117,778
*Total Reserves (B):	126,168

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
61-70%

Organisational changes

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

We no longer hold a legal aid contract or employ a solicitor.

Our income dropped by over £150000 from between March 2016 and March 2017.

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.			
	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	139,918	168,590	136,100
London Councils	0	0	0
Health Authorities	34,596	34,596	34,598
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.			
Name of Funder	Year 3 £	Year 2 £	Most recent £
Big Lottery Fund	162,337	69,850	0
East End Community Foundation	21,333	15,666	24,542
Money Advice Trust (Capitalise)	15,769	18,754	50,980
LLST	7,828	13,900	0
AB Charitable Trust	0	10,000	0

Declaration

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

Please confirm: Yes Full Name: **Steph Dickinson**

Role within **Manager**
Organisation:

MEETING: 20/09/2017

Ref: 13994

ASSESSMENT CATEGORY - Reducing Poverty

Legal Advice Centre (University House)

Adv: Jack Joslin

Base: Tower Hamlets

Amount requested: £132,924

Benefit: Tower Hamlets

Amount recommended: £132,900

The Charity

The Legal Advice Centre (University House) (LAC) is one of the oldest legal advice agencies in London. Founded in 1941 under the umbrella of the University House settlement, the LAC's objects are to relieve poverty by providing legal advice and assistance to needy persons' resident in the East End of London. Today the Centre is based in Roman Road and provides advice work across Tower Hamlets, Newham and South Hackney. Advice is provided by telephone, during drop in sessions and through an appointment system.

The Application

LAC is seeking support to expand its advocacy project to deal with the rise in demand for its services. The charity has experienced a rise in demand from vulnerable clients seeking help with appeals against the stoppage of Employment & Support Allowance, Disability Living Allowance and Personal Independence Payments. To manage this large caseload the charity is looking to employ a full-time Volunteer Coordinator and Caseworker to work directly with clients and manage the network of pro-bono legal advocates. The Caseworker/ Coordinator will need to be a welfare benefit specialist and qualified solicitor with a specific skill-set to work with a range of legal firms while delivering advice to the diverse community and their needs.

The Recommendation

LAC is a well-established legal advice charity in Tower Hamlets and serves a very deprived and diverse community. This project will allow the charity to increase the delivery of its Advocacy project that has seen a huge rise in demand. Funding is sought to employ a Caseworker/ Coordinator on a full-time basis to manage the charity's network of pro-bono legal volunteers while providing expert casework and advice. This project fits well with your programme outcomes for Reducing Poverty as it will allow for more people in Tower Hamlets, Newham and South Hackney to access debt and legal services. Funding is recommended as follows:

£132,900 over three years (3 x £44,300) towards a full-time (35hpw) Volunteer Coordinator and Caseworker to oversee the expansion of the Advocacy programme.

Funding History

Meeting Date	Decision
11/05/2017	After a discussion with your officer, the organisation decided to withdraw its application and will apply under another programme.
13/05/2015	The applicant withdrew the application during the assessment meeting.
18/04/2013	Declined as was a general support service for people with mental ill health and did not address your specific criteria.

Background and detail of proposal

LAC set up the Advocacy Project three years ago as a result of the welfare reforms. The charity saw a large increase in clients requiring support to appeal the stoppage of their benefit payments and an increase in the need for support through the tribunal process. In order to address this need the charity has appointed advocates to undertake case work. Initially the volunteers were law students from Queen Mary University and pro-bono lawyers from the law firm Skadden LLP. In 2016 the project provided advocates in 162 hearings with an 80% success rate. Slaughter and May, Shearman & Sterling, Reed Smith, Ropes & Gray, White & Case and Baker & McKenzie have recently joined the project offering pro-bono support to help cater to the growing need in the area.

Funding is sought to recruit a qualified solicitor and welfare benefits specialist to coordinate the growing service. They will build relationships with the pro-bono lawyers, law students and other voluntary sector partners to ensure that the increased need in referrals is met. The post holder will supervise the appeal cases that are undertaken ensuring that they are progressing and monitoring outcomes. The co-coordinator will also deliver a variety of training to both the legal practices supplying the pro-bono support but also to the voluntary sector partners who refer into the service. Training will cover advocacy, tribunal representation and legal training on disability related benefits.

Financial Information

LAC receives a large grant from the local authority, the Charity's current contract will come to an end in August 2018 but they have been given re-assurance that this will be extended. They also receive a number of donations from the Legal firms that they work with each year allowing them to maintain a good level of unrestricted reserves. They do not list any Cost of Generating funds in their accounts as this is done by the Centre Director on a pro-bono basis outside of working hours. The forecast deficit in the charities restricted fund is due to them completing their transfers between restricted and unrestricted funds at year-end only.

Year end as at 31 March	2016	2017	2018
	Examined Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	388,912	430,236	419,704
- % of Income confirmed as at 04/07/2017	n/a	%	78%
Expenditure	(358,345)	(387,852)	(420,700)
Total surplus/(deficit)	30,567	42,384	(996)
Split between:			
- Restricted surplus/(deficit)	(6,448)	(64,303)	(68,542)
- Unrestricted surplus/(deficit)	37,015	106,687	67,546
	30,567	42,384	(996)
Cost of Raising Funds	0	0	0
- % of income	0.0%	0.0%	0.0%
Operating expenditure (unrestricted funds)	28,573	29,856	28,000
Free unrestricted reserves:			
Free unrestricted reserves held at year end	37,015	79,399	78,403
No of months of operating expenditure	15.5	31.9	33.6
Reserves policy target	89,586	96,963	105,175
No of months of operating expenditure	37.6	40.3	45.0
Free reserves over/(under) target	(52,571)	(17,564)	(26,772)

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Legal Advice Centre (University House)	
If your organisation is part of a larger organisation, what is its name? N/A	
In which London Borough is your organisation based? Tower Hamlets	
Contact person: Mrs Shahanara Begum	Position: Solicitor
Website: http://www.legaladvicecentre.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1061182
When was your organisation established? 25/02/1997	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Reducing Poverty
Which of the programme outcome(s) does your application aim to achieve? More Londoners with improved economic circumstances Fewer Londoners experiencing food poverty
Please describe the purpose of your funding request in one sentence. Provide an advocacy service at tribunal level for people with health problems. Work with voluntary organisations to improve their capacity to deliver advocacy and representation.
When will the funding be required? 01/05/2017
How much funding are you requesting? Year 1: £42,908 Year 2: £42,908 Year 3: £42,908 Total: £128,724

Aims of your organisation:

The Charity's objects are to relieve poverty by providing legal advice and assistance to needy persons' resident in the East End of London, and in furtherance of this object and ancillary thereto, to institute, conduct and defend any proceedings before any Court or tribunal.

There are very few organisations in the East End of London who provide legal advice and casework to a specialist level. There is nothing in Newham. Last year we opened 2000 full cases. The majority of our users come from our local Bangladeshi and Somali communities. The area we serve has the highest rate of child poverty in the UK (CPAG).

We are part of the Tower Hamlets Community Advice Network. We work with the network to ensure access to justice for as many people as possible. We accept fast-track referrals from local organisations in order to ensure people are represented at the First-tier Tribunals. We also supply extensive second-tier support to local community organisations.

Main activities of your organisation:

We provide free and independent legal advice service to people in East London.

Last year(2016) included a number of 'firsts' for us. In February, we started Family Law Clinic- a partnership project involving 6 pro-bono law firms with focus on domestic violence matters. We take referrals from organisations throughout Tower Hamlets, Hackney and Newham. Within its first 6-months it was nominated for two national awards. In March, we run an advertising campaign on London Overground network- highlighting our work around Access to Justice. In April, we opened our 'Hybrid' charity shop in Bow, which acts as an open-access point to our services for local people. In May, we went 'live' with our Medico/Legal Project- working with number of health centres in Bow to embed specialist lawyers with them, which enables GPs to offer their patients legal interventions. In July, we were invited by the All Party Parliamentary Group on PLE to make presentation about our project on Access to Justice.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
5	5	12	200

Property occupied by your organisation

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

Summary of grant request

We are seeking funding to expand the capacity and scope of our existing Advocacy Project by developing collaborations and partnership working, and in doing so, we wish to become a volunteer/pro bono hub. We will also be working with other voluntary sector organisations to help them to increase capacity and improve their advocacy and representation skills by allowing access to our training, practical support to develop their volunteer systems and advocacy skills.

In the East End of London, our project has proven to be very successful and has now attracted a large number of pro bono partners. We now need funding to appoint a volunteer coordinator who can provide dedicated direct support to our volunteer 'advocates'. We need to take advantage of large numbers of volunteers that we now have access to in order to provide access to justice for as many people in the East End as possible.

We established our Advocacy Project some three years ago. As a result of the Government's welfare reforms, it was clear to us that the government was embarked upon systemic discrimination of people with disabilities. We were inundated with clients seeking help with appeals against the stoppage of Employment & Support Allowance, Disability Living Allowance and Personal Independence Payments. In order to address systemic discrimination, we have been supporting appointed 'advocates' to undertake disability appeal casework and to provide advocacy at appeals, which are heard at the First-tier tribunal. People with health problems and disabilities are often left with no money when their benefits are stopped. Voluntary sector organisations do not have the resources in place to support the large number of disability related cases that come through- we aim to increase the capacity of voluntary sector organisations for advocacy and representation and help to strengthen their volunteer systems.

Key outcomes are to address disability discrimination by providing individual support and representation and improve the capacity of other voluntary sector organisations to increase their capacity for advocacy and representation.

To date, we have provided some 140 advocates with training and support to take this work forward. Initially, our volunteers were law students from Queen Marys University, and lawyers from the USA law firm Skadden LLP. In 2016, the project provided advocates in 162 hearings and achieved a success-rate on appeal of 80%.

In recent months, the following large law firms have joined our project - Slaughter and May, Shearman & Sterling, Reed Smith, Ropes & Gray, White & Case, and Baker & Mckenzie.

We want to appoint a Volunteer Coordinator/Caseworker to provide dedicated support to this project, as we plan to double the number of our volunteer 'advocates' to 280 and to have achieved this by April 2017. By December 2017, we also plan to have at least doubled the number of tribunal cases we have assisted, to 324 full appeal hearings.

We also plan to open up our training to community organisations who wish to work in partnership with us. Once trained, we will offer them on-going support, help to develop/strengthen volunteer systems, including file reviews. We have a bespoke online case-management system. Our CMS was funded and developed by Clifford Chance LLP. We will offer the use of this at no cost to partner organisations. This amounts to £4K (cost of off-the-shelf systems) saving each year for each organization which becomes part of our network. This will mean that we can provide remote support such as file reviews and supervision, provided necessary permissions are in place. A number of organisations are part of our network, including the Bromley by Bow Centre, St Hilda's Community Centre and St Peters Bangladeshi Association.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

Advice Quality Standards (AQS).

Regulated by the Solicitors Regulations Authority.

FCA License for debt advice.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Provide representation and advocacy at tribunal hearings for disability related appeals.

Recruit volunteers and pro-bono lawyers from law schools and private law firms.

Promote and take referrals from other organisations and self-referrals from individuals for disability related appeal cases.

Organise and deliver training sessions to future advocates on disability related benefits, appeal procedures and tribunal representation.

Provide access to advocacy training to other organisations to increase their capacity and help to improve their advocacy and representation skills.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Advice and casework support and representation at tribunal hearings to 250 people per year who are vulnerable with health problems and unable to prepare their appeal cases without support.

250 people (with disabilities and long-term health problems) supported with disability related cases to improve their financial circumstances.

60 volunteers and pro-bono lawyers trained in a year.

4 group training sessions a year on appeals, advocacy and representation skills and legal knowledge on disability related benefits.

10 voluntary sector organisations will have increased capacity via access to specialist level training we provide.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

We aim to strengthen the partnership work with the pro-bono sector and hope to secure donations from private law firms within the partnership.

Who will benefit?

About your beneficiaries

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

250

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

Tower Hamlets (80%)

Hackney (10%)

Newham (8%)

Barking & Dagenham (1%)

Waltham Forest (1%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

75 and over

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

91-100%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary (Volunteer Coordinator/Caseworker)	42,908	42,908	42,908	128,724
Insurances	900	900	900	2,700
Publicity	500	500	500	1,500
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	44,308	44,308	44,308	132,924
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary (Volunteer Coordinator/Caseworker)	42,908	42,908	42,908	128,724
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	42,908	42,908	42,908	128,724
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Finance details

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

Financial year ended:	Month: March	Year: 2016
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Income received from:	£
Voluntary income	388,912
Activities for generating funds	0
Investment income	0
Income from charitable activities	0
Other sources	0
Total Income:	0

Expenditure:	£
Charitable activities	354,424
Governance costs	3,921
Cost of generating funds	0
Other	0
Total Expenditure:	0
Net (deficit)/surplus:	30,567
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	
Investments	0
Net current assets	37,015
Long-term liabilities	
*Total Assets (A):	37,015

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	37,015
*Total Reserves (B):	37,015

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
41-50%

Organisational changes

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

None

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	51,000	103,955	164,499
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Trust for London	23,000	29,000	46,750
Big Lottery (Transition Fund)- Year 1. East End Community Foundation - Year 2&3.	30,000	13,600	12,000
Lloyds TSB Community Foundation - Year 1&3. London Legal Services - Year 2.	14,500	11,896	14,500
Evening Standard Dispossessed Fund - Year 1. Bow Haven - Year 2. London Legal Support Trust - Year 3.	7,000	1,875	12,000
Hackney Parochial & South Hackney Parochial	5,000	5,000	7,000

Declaration

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

Please confirm: Yes Full Name: **Shah Begum**

Role within **Solicitor**
Organisation:

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MEETING: 20/09/2017

Ref: 14154

ASSESSMENT CATEGORY - Reducing Poverty

Sangam Association of Asian Women (SAAW)

Adv: Kate Moralee

Base: Barnet

Benefit: Barnet

Amount requested: £173,697
(Revised Request : £182,834)
Amount recommended: £182,800

The Charity

Sangam Association of Asian Women was formed in the 1980's to support Asian women arriving from East Africa. It demonstrated great business acumen and astuteness at the time by raising money to build a Community Building which provides a commercial income stream enabling the organisation to provide services for the local community. Over the years SAAW has widened its client base as needs of the local community have changed. Now many of their clients are from Eastern European communities, specifically Polish and Romanian. The ethos of the organisation is one of involving individuals in solutions to their issues and developing skills and knowledge to support this.

The Application

City Bridge Trust is being asked to support the provision of a dedicated debt advice service including one f/t Debt Adviser, training and expenses for volunteers, provision of training in personal budgeting for individuals and associated organisational costs.

The Recommendation

This is a well led organisation which has its roots in the local community. It understands the changing needs and ethnic make-up of the local community, regularly reviewing its services offer to ensure community needs are being met. This project will provide debt support and advice to individuals as well as "Managing Your Money" training and mentoring in the use of digital channels to empower individuals with the skills and abilities to self-help in the future. The additional amount now requested is due to removal of any additional staff costs (admin) and inclusion of the rental element of the project, discussed at the assessment visit. Funding is recommended:

£182,800 (£61,200, £59,800, £61,800) for a f/t Debt Advice case worker, training delivery and recruitment and support of volunteers.

Funding History

Meeting Date	Decision
26/11/2015	Application was withdrawn by the organisation as it wished to revise its request.

Background and detail of proposal

Sangam Association for Asian Women has delivered general advice services for the local community since the 1980's. This proposal builds on and complements a pilot project funded by Barnet Council in 2012 and since funded by Women India Association at approximately £10,000 per annum. The service currently offers a programme of personal budgeting training to people to empower them to manage their own finances. However there has been an increasing demand for debt specific

advice, identified through monitoring uptake of generic advice services and counselling.

Locally there has been a drastic reduction in provision of legal and advice services, with the closure of Barnet Law Centre, East Finchley Advice Service and Barnet CAB in Collingdale. The only other advice provision in the local area is Hendon CAB, which does not provide any debt specific advice. The CAB provides information on where to find forms online but does not have the capacity to support people to complete these forms.

With the many changes to the Welfare Benefit System and the impending roll out of Universal Credit, demand for all services at Sangham is increasing. Sangham's services include counselling, advice and training with an ethos of empowerment.

This proposal recognises the growing need for debt specific support and advice as financial worries are increasing levels of stress and having a negative impact on mental health and wellbeing. It is recognised that people are experiencing more complex and critical financial difficulties with limited skills and confidence to resolve the issues. Individuals are referred both internally and from external organisations.

This project adopts a person centred approach to supporting people with debt issues. It proposes to offer face to face individual debt advice to address crisis, followed by specific training on managing your money. It also intends to recruit and train a pool of volunteers to support people to access and complete online forms. This approach will support people to have the skills to proactively manage their finances and address any issues at early stage in the future.

Financial Information

This organisation is financially stable with the majority of its income generated through commercial letting of venue space in its property. It maintains healthy reserves, which include delegated funds for operational purposes.

Year end as at 31st March	FY 15/16	FY 16/17	FY 17/18
	Audited Accounts	Audited Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	319,676	264,061	267,000
- % of Income confirmed	n/a	n/a	11%
Expenditure	(303,836)	(287,218)	(272,000)
Total surplus/(deficit)	15,840	(23,157)	(5,000)
Split between:			
- Restricted surplus/(deficit)	(1,719)	(29,402)	0
- Unrestricted surplus/(deficit)	17,559	6,245	(5,000)
	15,840	(23,157)	(5,000)
Cost of Raising Funds	50,333	44,477	30,000
- % of income	15.7%	16.8%	11.2%
Operating expenditure (unrestricted funds)	242,914	246,776	250,000
Free unrestricted reserves:			
Free unrestricted reserves held at year end	111,068	117,313	112,313
No of months of operating expenditure	5.5	5.7	5.4
Reserves policy target	151,918	143,609	134,000
No of months of operating expenditure	7.5	7.0	6.4
Free reserves over/(under) target	(40,850)	(26,296)	(21,687)

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Sangam Association of Asian Women	
If your organisation is part of a larger organisation, what is its name? N/A	
In which London Borough is your organisation based? Barnet	
Contact person: Mrs Daksha Chauhan-Keys	Position: Charity Manager
Website: http://www.sangamcentre.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1119239
When was your organisation established? 01/10/1971	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Reducing Poverty
Which of the programme outcome(s) does your application aim to achieve? More people accessing debt and legal services More Londoners with improved economic circumstances
Please describe the purpose of your funding request in one sentence. We wish to provide a dedicated Debt Advice Service to the residents who are on low income and have debt issues and are vulnerable.
When will the funding be required? 02/10/2017
How much funding are you requesting? Year 1: £56,864 Year 2: £56,712 Year 3: £60,121 Total: £173,697

Aims of your organisation:

The aims and objectives of the charity are set out in the Charity's constitution and are summarised as follows:

"To promote any charitable purpose for the benefits of the community by advancing education, protecting health, relieving poverty, distress and sickness and to promote cultural activities and generally undertake any charitable activities"

In furtherance of these Sangam aims:

To meet the ever-changing needs of our communities and to have the ability to provide appropriate services.

To relieve poverty, hardship, and distress of the socially and economically disadvantaged without discrimination to any race, creed or gender.

To empower women, youth and the underprivileged with counselling, in order to build awareness and provide a positive outlook.

To educate and inspire the children and youth of the rich heritage the sub-continent is endowed with, by providing cultural classes.

Main activities of your organisation:

We provide the following services to support clients to improve their financial, emotional and social wellbeing. It includes;

? Counselling Services - a confidential one to one counselling for those who have suffered from domestic violence or experience complex issues.

? Welfare Benefits advice and support in all areas of Social Welfare Law, which also includes Debt advice and support and Immigration advice.

? Health and Wellbeing - To promote healthy living, we offer a range of classes, activities and clubs to ensure and enhance wellbeing.

? Senior Citizens Clubs - The members benefit from taking part in regular classes and social activities.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
2	8	9	25

Property occupied by your organisation

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

Summary of grant request

There is an increasing demand for debt advice as a result of closure of some of the local services and as a result of restrictions and changes in the model of delivery towards digital models and self help.

? According to the Citizens Advice Survey (Debt Health and Wellbeing Survey of December 2012) debt problems are affecting every aspect of people lives. Our experience also confirms that financial worries are having drastic impact on people who are faced with unemployment, issues such as high rentals, redundancies and low income.

Unavoidable circumstances are putting people in poverty and in debts which has further impact on them such as relationship breakdown, low self esteem and affecting their health and wellbeing. At present we are providing debt advice as part of our generic Advice however the demand is increasing and clients need advice and support and need training and skills to enable them to use the digital options. We receive a small amount of funding to support the work.

We therefore are proposing to deliver a dedicated debt support service affected by debt, and we will gather all the information, discuss and suggest options, negotiate with third parties to resolve matters. The service will cover casework taking all steps to support the client until their cases are concluded.

Personal budgeting training will be provided to enable clients to manage their debt and support will provided to enable and empower clients to put together a Budgeting Plan, prioritising urgent and non-urgent debt, planning monthly repayments to realistic and affordable levels, stop creditors taking enforcement action including protection of their homes.

Mentoring and Training with using of digital channels through trained individuals, to develop skills and abilities to be able to self help in the future will be delivered through a small pool of trained volunteers.

Debt Advice Support will be delivered to the most vulnerable people and targeted to those who are vulnerable, on low income, those living in the most deprived areas, in debt, members of black and minority communities and migrants communities from Eastern Europe.

This project will help the beneficiaries with the following;

- Reduce debt levels resulting in stability and security, for example less likely to become homeless through enforced legal action.
- Offer advice, training and support at the right time rather than problems escalating to a crisis.
- Developing personally with new skills, increased awareness of using digital platforms to self help in the future and support others.
- Improved confidence and be able to take control of situations
- Improved mental health including reduction in stress and anxiety levels
- Improvement in family relationships and avoid breakdown of family unit.

We are best placed to deliver as we have the experience, the expertise, clients come to us from across multiple boroughs and have the language expertise. Sangam delivered a pilot through funding from Barnet Council and have got systems in place to run the project.

Our application meets the Trust's Programme Outcome under Reducing Poverty.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

We have Advice Quality Standard (AQS)

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Debt Advice and support will be available 4 days per week and offer 20 debt advice appointments over the week. Therefore over the three years we will offer 2880 appointments.

We anticipate to support over 700 clients per year so over the 3 year project will support over 2100 clients.

Personal training Programme will be delivered on a quarterly basis to over 40 people which will result in 160 people per year and over the 3 years will support 480 people.

Recruit and train between 10 - 20 volunteers over the three years to support people through the digital models.

Deliver mentoring and support through trained volunteers to clients to use the digital models of help available to 60 people on an annual basis and over the 3 year project to 150 people

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Increased knowledge about options available to them resulting in better financial skills in managing to live well.

Improved planning skills and better budgeting skills to manage personal finances and understanding of priority and non priority debts.

Improved confidence and be able to take control of situations to manage the debts.

Confidence about using the Digital channels available to them to help themselves in the future.

Improved wellbeing of the individual and the family unit

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

We would like to continue to provide the service if the demand is there for the service and will continue to generate unrestricted income to pay for the service or apply for grant funding.

Who will benefit?

About your beneficiaries

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

800

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

Barnet (60%)

Brent (20%)

Harrow (20%)

What age group(s) will benefit?

16-24

25-44

45-64

65-74

What gender will beneficiaries be?

All

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

A range of ethnic groups

White (including English/ Welsh/ Scottish/ Northern Irish/ British; Irish; Gypsy, Traveller or Irish Traveller; Any other White background)

Mixed / Multiple ethnic groups

Asian/ Asian British (including Indian; Pakistani; Bangladeshi; Chinese; Any other Asian background)

**Black/ African/ Caribbean/ Black British (including African; Caribbean; Any other
If Other ethnic group, please give details:**

What proportion of the beneficiaries will be disabled people?

11-20%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salaries, NI and Pension	34,344	35,028	35,730	105,102
Admin Costs	3,120	3,184	3,247	9,551
Training costs	1,500	1,500	1,500	4,500
Volunteers and mentoring costs	1,500	1,500	1,500	4,500
Direct Project Costs	4,200	4,250	4,300	12,750
Overhead Costs	6,500	6,630	6,762	19,892
Management Costs	4,200	4,620	5,082	13,902
Computers	1,500	0	0	1,500
Evaluations	0	0	2,000	2,000
TOTAL:	56,864	56,712	60,121	173,697

What income has already been raised?

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

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
WIA	10,000	0	0	0
	0	0	0	0
	0	0	0	0
TOTAL:	10,000	0	0	0

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salaries, NI and Pension	34,344	35,028	35,730	105,102
Admin	3,120	3,184	3,247	9,551
Volunteers Costs	1,500	1,500	1,500	4,500
Volunteers and Mentoring costs	1,500	1,500	1,500	4,500
Direct Project Costs	4,200	4,250	4,300	12,750
Overhead Costs	6,500	6,630	6,762	19,892
Management Costs	4,200	4,620	5,082	13,902
Computers	1,500	0	0	0
Evaluation	0	0	2,000	2,000
TOTAL:	56,864	56,712	60,121	173,697

Funding required for the project *Revised Request***What is the total cost of the proposed activity/project?**

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary/NI/Pension	£34,344	£35,028	£35,730	£105,102
Direct Project Costs (Rent @ 5% increase)				
publicity, stationery, telephone, postage)	£14,850	£15,000	£15,582	£45,432
Training for the clients	£1000	£1000	£1000	£3000
Mentoring and volunteer costs	£1000	£1000	£1000	£3000
Overheads costs @10% IT, Subs, PI, Audit	£2750	£3000	£3500	£9250
Management Costs (manager + governance)	£4750	£4300	£4000	£13050
Computer x 3 + set up	£2,000	-	-	£2000
Evaluation	£500.00	£500.00	£1000.00	£2000
Admin Costs	£3120	£3184	£3247	£9551
TOTAL:	£64,314	£63,012	£65,059	£192,385

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
TOTAL:				

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
TOTAL:				

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary/NI/Pension	£34,344	£35,028	£35,730	£105,102
Direct Project Costs (Rent @ 5% increase)				
publicity, stationery, telephone, postage)	£14,850	£15,000	£15,582	£45,432
Training for the clients	£1000	£1000	£1000	£3000
Mentoring and volunteer costs	£1000	£1000	£1000	£3000
Overheads costs @10% IT, Subs, PI, Audit	£2750	£3000	£3500	£9250
Management Costs (manager + governance)	£4750	£4300	£4000	£13050
Computer x 3 + set up	£2,000	-	-	£2000
Evaluation	£500.00	£500.00	£1000.00	£2000
TOTAL	£61,194	£59,828	£61,812	£182,834

Finance details

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

Financial year ended:	Month: March	Year: 2017
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Income received from:	£
Voluntary income	11,823
Activities for generating funds	210,606
Investment income	3,886
Income from charitable activities	37,746
Other sources	0
Total Income:	264,061

Expenditure:	£
Charitable activities	224,094
Governance costs	18,647
Cost of generating funds	44,477
Other	0
Total Expenditure:	287,218
Net (deficit)/surplus:	-23,157
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	690,241
Investments	
Net current assets	301,745
Long-term liabilities	0
*Total Assets (A):	991,986

Reserves at year end	£
Restricted funds	137,313
Endowment Funds	0
Unrestricted funds	854,673
*Total Reserves (B):	991,986

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
1-10%

Organisational changes

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

The main significant change is the financial position as we have had to carry out substantial amount of works to the property that were necessary in the last financial year. The building still requires further refurbishment works and we have put a timetable of

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	559	445	10,000
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Awards for All	10,000	0	10,000
WIA	10,000	9,851	17,802
Barnet council	559	445	10,000
People's Postcode Lottery	0	0	4,233
	0	0	0

Declaration

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

Please confirm: Yes Full Name: **Daksha Chauhan-Keys**

Role within **Charity Manager**
Organisation:

MEETING: 20/09/2017

Ref: 14011

ASSESSMENT CATEGORY - Resettlement and Rehabilitation of Offenders

Working Chance

Adv: Shegufta Rahman

Base: Islington

Amount requested: £157,958

Benefit: London-wide

Amount recommended: £117,000

The Charity

Registered in 2009, Working Chance (WC) is the UK's only recruitment consultancy for women with criminal convictions and young women care leavers at risk of offending. Providing specialist employment services to women in prison, on probation and out in the community, WC helps individuals cross the social divide from a life of exclusion to one of contribution. Based in Islington, the charity recently launched two satellite offices working out of HMP Downview and Manchester.

The Application

WC recognises the talent amongst women with criminal convictions and has an organisational model demonstrating this; 60% of staff have criminal convictions. WC is seeking funding for a Trainee Recruitment Coach for the first year, with a view to the post graduating into a Recruitment Coach in years two and three. This post will be filled by a woman with a criminal conviction and forms part of the London team, aiming to support nearly 700 women into paid work over the three year period.

The Recommendation

WC has shown significant growth and success in its eight years of supporting women with criminal convictions into paid work. The amount recommended is less than that requested as usually you do not fund more than one FTE post (see Appendix 1 to application) – although a reasonable contribution to core costs has been maintained.

£117,000 over three years (£35,000, £40,500, £41,500) for one FT Recruitment Coach and associated project costs for work with Londoners.

Funding History

Meeting Date	Decision
28/01/2016	Application withdrawn as was made during fallow period.

Background and detail of proposal

Women with criminal convictions face a wide swathe of gender-specific challenges which prevent them from finding stable employment. 46% of women in prison report having suffered a history of self-harm in prison, despite only representing 5% of the prison population. Employment outcomes for women following short prison sentences are three times worse than for men – only 8.5% of women, not in receipt of specialist employment support services, report a positive job outcome within a year of release, compared with 26% of men.

Over the last eight years, WC has placed 875 women into paid work, and 458 into voluntary work, achieving a sustainability rate of 82% of women remaining in their job for six months or longer. Employment is proven to be a critical factor in reducing reoffending. The reoffending rate for women supported by WC is less than 5%, compared with the national average of 45% for women leaving prison. As well as working towards creating safer communities, the charity's work is creating significant

savings to the taxpayer, with the average cost of keeping a woman in prison averaging £40,000 a year. There are additional financial benefits to local economies, employment rates, and costs associated with any children that may be placed into foster care.

The charity has piloted the Trainee Recruitment Coach post with significant success in the past. In 2012 it recruited its first serving offender, who rose from volunteer to: Trainee Recruitment Coach; Recruitment Coach; Senior Recruitment Coach; Recruitment Manager, before most recently being responsible for opening the pilot Manchester office which has been operational since August 2016. As well as the positive impact on the recruited individual herself, the post will be crucial to the growth in the number of women supported by WC into paid jobs. Having placed nearly 900 women into paid roles in eight years, the charity is hoping to place another 700 in London over the three year grant period. As a previous Lord Mayor's Appeal charity, two candidates from WC went on to work in that Lord Mayor's Office.

Financial Information

During the past Lord Mayor Fiona Woolf's term (2013/14), WC was chosen as one of the Lord Mayor's Appeal charities. In 2014/15, the charity received £320,000 from the Appeal; a major contribution to its 50% increase in income from the previous year. This accounts for the significant level of free reserves held in year end to 2016. Some of this funding was utilised to grow and to deal with the impact of HMP Holloway closing, as well as a significant proportion designated for WC's 10 year anniversary in 2019. WC has confirmed that trustees will re-evaluate the total designated funds and consider transferring a sum into free unrestricted reserves, aligning to its reserves policy, having held a substantial amount designated and therefore not counted as part of free reserves, in error.

WC has a strategic plan for growing its Partnerships Programme as an alternative source and diversification of its income. Designing, securing and delivering bespoke packages to Corporates to become Silver, Gold or Platinum Members in order to mentor candidates, volunteer and work in prisons; all of which meets Corporate Social Responsibility, diversity and inclusion targets. Current Members include Virgin Media, Black Rock, Carpetright and Bank of Tokyo.

Year end as at 31 August	2016	2017	2018
	Audited Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	996,405	919,475	860,159
- % of Income confirmed as at 04/07/2017	n/a	81%	36%
Expenditure	(961,767)	(1,249,231)	(856,808)
Total surplus/(deficit)	34,638	(329,756)	3,351
Split between:			
- Restricted surplus/(deficit)	(29,134)	13,333	39,000
- Unrestricted surplus/(deficit)	63,772	(343,089)	(35,649)
	34,638	(329,756)	3,351
Cost of Raising Funds	17,610	49,075	23,000
- % of income	1.8%	5.3%	2.7%
Operating expenditure (unrestricted funds)	324,517	681,084	618,441
Free unrestricted reserves:			
Free unrestricted reserves held at year end	404,462	74,706	78,057
No of months of operating expenditure	15.0	1.3	1.5
Reserves policy target	81,129	170,271	154,610
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	323,333	(95,565)	(76,553)

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Working Chance	
If your organisation is part of a larger organisation, what is its name? n/a	
In which London Borough is your organisation based? Islington	
Contact person: Ms Rachel Poynor	Position: Development Officer
Website: http://www.workingchance.org	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1131802
When was your organisation established? 24/09/2009	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Resettlement and Rehabilitation of Offenders
Which of the programme outcome(s) does your application aim to achieve? More ex-offenders successfully and sustainably resettled in the community and re-offending rates reduced More Londoners with improved economic circumstances
Please describe the purpose of your funding request in one sentence. To further develop an apprenticeship scheme to train ex-offenders to be Recruitment Coaches, fulfilling our mission to transform the lives of women ex-offenders through employment.
When will the funding be required? 01/09/2018
How much funding are you requesting? Year 1: £32,023 Year 2: £52,531 Year 3: £73,405 Total: £157,958

Aims of your organisation:

Working Chance was founded to support women with criminal convictions into quality paid jobs. We believe that discrimination against ex-offenders is counterproductive and leads to higher rates of reoffending and reduced talent and diversity within the workforce. By finding women ex-offenders jobs they love and challenging employer prejudice, we empower women to become financially independent so they can provide for themselves and their families, breaking the intergenerational cycle of deprivation and crime. We have recently expanded our work to include young women care leavers who are at high risk of entering the criminal justice system.

Main activities of your organisation:

Working Chance is a specialist recruitment consultancy for women ex-offenders and young women care leavers: all of our activities are centred on helping women to find and sustain employment and stay away from a life of poverty and crime. Our team of Recruitment Coaches help our beneficiaries to identify career goals, market them to employers, help them to develop an outstanding CV and interview skills and continue to coach them and trouble-shoot any problems once they are in employment. We run regular employability workshops as well as practice interview events with employers which help women to develop confidence and practice their interview and disclosure skills. Our support specialists work alongside our Recruitment Coaches to help women to tackle any barriers to employment which they might be facing, such as finding permanent accommodation following release from prison and tackling debts which may have spiralled further out of control during their sentence.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
17	6	8	60

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Rented	2 years

Summary of grant request

Women with convictions are one of the most isolated, stigmatised groups in the UK today. Working Chance empowers these women to move from lives of exclusion to ones of contribution by supporting them into sustainable, paid employment which enables them to break the intergenerational cycle of deprivation and crime. Our preventative work with young women care leavers also helps to prevent this at-risk group from entering the criminal justice system.

We are requesting funding to enable us to continue running our apprenticeship programme at our office in Islington. With funding, we will be able to employ and train three women ex-offenders or care leavers as Trainee Recruitment Coaches, so that they can support their peers into employment. We want to build our team and further involve our beneficiaries by employing more women who have first-hand experience of the transition from institutionalised to independent living. With this project we aim not only to reduce reoffending, but to prevent intergenerational poverty and disadvantage being passed from mother to child. By finding women jobs they love, we will reduce their isolation and enable them to achieve financial independence.

We are in a strong position to deliver this work, having developed our apprenticeship programme over the last two years, with two former trainees continuing to work for us. With many of our staff being ex-offenders themselves, we are able to provide the right environment to support our trainees. Our trainees will be managed by our Head of Recruitment and supervised day-to-day by our Senior Recruitment Coach who is a former trainee herself. Trainees will have an opportunity to gain valuable transferable skills while supporting other women to secure employment. They will have access to clinical supervision and the training needed to develop a career. At the end of their first year of training, they will become fully-fledged Recruitment Coaches with higher targets, greater responsibility for building relationships with employers and a role to play in mentoring other trainees.

This project will support the resettlement of women ex-offenders in and around London and will change the lives not only of the trainees who take part, but also of the women that they support into sustainable employment. Employment is a crucial factor in reducing reoffending and our track record clearly reflects this: less than 5% of the women we support into work reoffend, in stark contrast with the national average of 45% for women leaving prison. We bring on job opportunities to match our beneficiaries' needs and aspirations and, as a result, over 80% of women we place into work are still in their jobs after six months. Our in-work support also helps women to overcome any challenges (such as housing difficulties or debt) which could prevent them from sustaining employment and slipping back into poverty and crime.

Our work is well aligned with the Trust's principles of good practice:

â€¢ We believe in putting our money where our mouth is: 45% of our staff are ex-offenders themselves.

â€¢ We serve a highly diverse group of women: 53% of those placed into work last year described their ethnicity as black, 30% as white, 6% as Asian and 11% as mixed. 10% of candidates were under 21 and 29% over 41.

â€¢ Volunteers (often serving offenders) support our work in the office on a day-to-day basis and provide an invaluable contribution to our practice interview events.

â€¢ We are reducing our carbon footprint by recycling and minimising our printing. ¾ our offices are also double glazed. We encourage staff to walk or cycle to work and to avoid wasteful takeaway shops by preparing their lunches in our kitchen.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

N/a

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Training of three women ex-offenders as Recruitment Coaches, so that they are able to support other women ex-offenders into sustainable paid employment, while also developing skills to further their own careers.

Delivery of CV, interview and disclosure advice and preparation as well as job brokerage in order to secure paid job placements for over 160 women over the course of the project

Building relationships with new and existing employers to encourage them to hire ex-offenders and to ensure that they have a positive experience of hiring through Working Chance.

Delivery of in-work coaching and support to around 330 women to help them overcome any challenges they are facing as they make the transition into paid employment (including the three trainees employed by Working Chance through the programme).

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Life-changing sustained employment opportunities for over 160 women ex-offenders and young women care leavers, including the trainees taking part in the programme.

Reduction in re-offending amongst women ex-offenders and early intervention with young women care leavers to stop them entering the criminal justice system.

Increased financial and emotional independence for women ex-offenders, so that they are better able to care for themselves and their families.

More women ex-offenders acting as role models for their children and in their communities.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

We have every intention of continuing to deliver the apprenticeship programme beyond the funding period and are currently looking at how to diversify our income, including through statutory contracts, major donors and earned income through providing consultancy and launching a corporate membership programme.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year? 110
In which Greater London borough(s) or areas of London will your beneficiaries live? London-wide (100%)
What age group(s) will benefit? 16-24 25-44 45-64
What gender will beneficiaries be? Female Transgender or other gender identity
What will the ethnic grouping(s) of the beneficiaries be? A range of ethnic groups
If Other ethnic group, please give details:
What proportion of the beneficiaries will be disabled people? 1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Trainee Recruitment Coach	25,916	25,916	25,916	77,748
Promotion to Recruitment Coach	0	31,806	64,248	96,054
Clinical supervision	1,430	2,860	4,290	8,580
Training and development	500	1,000	1,500	3,000
Core costs	4,177	9,237	14,393	27,807
	0	0	0	0

TOTAL:	32,023	70,819	110,347	213,189
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
0	0	0	0	
0	0	0	0	

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
Big Lottery Fund	0	15,903	32,124	48,027
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	15,903	32,124	48,027
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Trainee Recruitment Coach salary (including pension and NI)	25,916	25,916	25,916	77,748
Recruitment Coach salary following promotion from Trainee (including pension and NI)	0	15,903	32,124	48,027
Fortnightly clinical supervision for each post	1,430	2,860	4,290	8,580
Training and development	500	1,000	1,500	3,000
Core costs	4,177	6,852	9,575	20,603
	0	0	0	0
	0	0	0	0

TOTAL:	32,023	52,531	73,405	157,958
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Finance details

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

Financial year ended:	Month: August	Year: 2016
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Income received from:	£
Voluntary income	143,112
Activities for generating funds	52,178
Investment income	2,640
Income from charitable activities	798,475
Other sources	0
Total Income:	996,405

Expenditure:	£
Charitable activities	944,157
Governance costs	0
Cost of generating funds	17,610
Other	0
Total Expenditure:	961,767
Net (deficit)/surplus:	34,638
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	34,638

Asset position at year end	£
Fixed assets	13,752
Investments	0
Net current assets	890,710
Long-term liabilities	0
*Total Assets (A):	904,462

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	904,462
*Total Reserves (B):	904,462

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

N/A

Finance details

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

Financial year ended:	Month: August	Year: 2016
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Income received from:	£
Voluntary income	143,112
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Unrestricted funds	904,462
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* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

N/A

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Big Lottery Fund	0	487,902	0
Impetus-PEF	300,000	0	0
Monument Trust	0	198,000	0
Oak Foundation	0	174,543	0
KPMG Foundation	0	0	162,000

Declaration

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

Please confirm: Yes Full Name: **Rachel Poynor**

Role within **Development Officer**
Organisation:

MEETING: 20/09/2017

Ref: 14123

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

LawWorks

Adv: Sandra Jones

Base: City

Benefit: London-wide

Amount requested: £111,285

(Revised request: £162,663)

Amount recommended: £162,700

The Charity

LawWorks is the operational name for the Solicitors Pro Bono Group – a charity which coordinates its members from the legal sector to provide free advice to small not-for-profit organisations (voluntary, community groups, CICs and social enterprises) as well as to individuals. In 2016 approximately 2,350 pro bono hours were given for advice to the sector, with 144 organisations benefitting. The main areas of law advised on were property, commercial, and employment law, as well as ‘corporate’ matters (such as constitutions and transfers of assets).

The Application

The applicant is seeking three year funding towards the costs of supporting free legal advice to community organisations in London. The original bid was for two years, but after discussions with your officer this was changed to three years to ensure continuity (a revised budget is appended to the application form). Funding will cover 0.5FTE of both the Head of the Not for Profits Programme (NfPP) and the NfPP Caseworker; 0.5 day per week for Director of Programmes; and associated running costs. This is 50% of the programme costs, with the other 50% funded through their unrestricted funds raised from membership and funding from the Law Society.

The Recommendation

The charity has over 15 years’ experience of delivering free legal support to local community organisations through volunteer solicitors – work which has been supported by you previously. The support is highly regarded and provides legal advice to organisations that would otherwise be unable to access the support they need to resolve serious problems. It is important work expertly delivered by the most appropriate organisation. Funding is advised:

£162,700 over three years (53,000; £54,200; £55,500) towards the salaries of the Head of NfPP (0.5FTE); NfPP Caseworker (0.5FTE); Head of Programmes (0.1FTE); and associated running costs.

Funding History

Meeting Date	Decision
28/04/2011	£99,000 over three years (3 x £33,000) towards the general salary and running costs of supporting free legal advice to community organisations in London.

Background and detail of proposal

LawWorks’ NfPP programme provides a range of services. The main activity is matching small local organisations with Pro Bono volunteer solicitors. Work undertaken by the volunteers includes face-to-face advice clinics; mediation to

resolve disputes; advice by e mail; as well as advice to small charities on business law such as employment, leases, data protection and charity law. To be eligible for the project's services, organisations should have a turnover of less than £500,000. Free legal advice, especially on employment, leases and charity law, will often help organisations become more sustainable.

The organisation also produces a series of fact sheets, regular seminars and provides training to solicitors to ensure that they have the skills and knowledge required to deliver the best service.

Financial Information

LawWorks' income is from a variety of sources. Core funding is largely from the Law Society, Ministry of Justice, and Membership subscriptions and is unrestricted. Unrestricted income equates to 77% of the total income for 2016. It is forecast that this pattern for unrestricted income will continue in the current year.

In 2013 and 2014 the charity showed the organisation had operating deficits. This has not been the case in subsequent years; in 2015 the Trustees agreed to increase the reserves policy to 6 months and have been seeking to increase their free reserves. Cost of raising funds is relatively low as the unrestricted income for core funding (above) is ongoing.

Year end as at December	2015	2016	2017
	Examined	Examined	Forecast
	£	£	£
Income & expenditure:			
Income	860,556	907,977	912,375
- % of Income confirmed 02/08/17	n/a	n/a	100%
Expenditure	(810,428)	(775,503)	(856,060)
Total surplus/(deficit)	50,128	132,474	56,315
Split between:			
- Restricted surplus/(deficit)	1,000	374	(440)
- Unrestricted surplus/(deficit)	49,128	132,100	56,755
	50,128	132,474	56,315
Cost of Raising Funds	26,092	29,078	36,000
- % of income	3.0%	3.2%	3.9%
Operating expenditure (unrestricted funds)	628,228	565,917	989,399
Free unrestricted reserves:			
Free unrestricted reserves held at year end	259,113	391,213	447,968
No of months of operating expenditure	4.9	8.3	5.4
Reserves policy target	157,057	282,959	494,700
No of months of operating expenditure	3.0	6.0	6.0
Free reserves over/(under) target	102,056	108,255	(46,732)

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: LawWorks	
If your organisation is part of a larger organisation, what is its name? N/A	
In which London Borough is your organisation based? City	
Contact person: Mr. David Raeburn	Position: Director of Programming
Website: http://www.lawworks.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1064274
When was your organisation established? 29/07/1997	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More equalities organisations with enhanced voice, advocacy and representation skills
Please describe the purpose of your funding request in one sentence. To support our Not-For-Profits Programme to enable us to continue to broker services to small, voluntary organisations which struggle to pay for legal advice.
When will the funding be required? 02/10/2017
How much funding are you requesting? Year 1: £54,955 Year 2: £56,330 Year 3: £0 Total: £111,285

Aims of your organisation:

LawWorks believes in the power of pro bono legal advice to help improve the lives of people in need:

- 1) by enabling access to justice to individuals in need of advice who are not eligible for legal aid and are without the means to pay for a lawyer (through our LawWorks Clinics Programme); and
- 2) by brokering legal advice to small not-for-profit organisations, to support the continuation and expansion of their services to people in need (through our Not-for-Profits Programme).

LawWorks aims to support and develop pro bono activity across England and Wales, using our experience and understanding to ensure pro bono efforts are targeted where they can be most effective and have the greatest impact.

Our work is informed by the needs of people, developed in collaboration with partner stakeholders, and delivered by a network of committed volunteer lawyers and law students.

Main activities of your organisation:

Through our LawWorks Clinics Programme, we support a network of independent legal advice clinics across England and Wales which offer access to free advice by volunteer lawyers on a variety of legal issues including welfare benefits, housing, and family law to some of the country's most vulnerable individuals and families. However, we recognise that for some people more comprehensive support is needed. Because of this, where other forms of free legal advice are unavailable, we work with partner stakeholders to strengthen and deepen the legal expertise on offer through our Secondary Specialisation Programme.

This application focuses on our Not-For-Profits Programme (NFPP), formerly known as LawWorks for Community Groups, which provides access to free legal advice to small charities, community organisations and social enterprises that assist people in need in England and Wales. The NFPP connects these small not-for-profit organisations with the skills and expertise of volunteer lawyers willing to provide advice for free, strengthening their capacity to deliver their services.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
12	5	10	212

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	The lease ends in May 2020

Summary of grant request

The Not-For-Profits Programme is needed because small charities in particular struggle to survive financially at a time when their services to beneficiaries are in huge demand (in 2016 the National Council for Voluntary Organisations' report "Navigating Change" found that government income for small charities had fallen by 38% on average). A report entitled Social Landscape 2017 published by the Charities Aid Foundation recently found that 25% of chief executives of small charities think their organisations are struggling to survive, with 80% of all respondents saying that demand for their services had increased over the past 12 months.

Charities therefore have to make difficult decisions about whether to use their scarce resources on obtaining legal advice or to support their beneficiaries. Paying for legal advice when an unexpected issue arises can tip a small charity into administration. Equally, obtaining advice can enable focus and expansion, and be the foundation for increased capacity to deliver much-needed services.

The aim of the NFPP is to help small charities facing this dilemma through the provision of free legal advice from some of the country's top legal teams. Caseworkers assess applications from small not-for-profit organisations such as charities, voluntary organisations and social enterprises that in turn assist vulnerable and disadvantaged people in England and Wales. Issues tackled by these organisations vary enormously but commonly deal with poverty, disability, abuse, social exclusion and special educational needs. We match them with volunteers with the relevant expertise needed. Examples of requests for legal help include reviewing leases, drafting contracts, updating constitutions or advising on rights in a dispute.

LawWorks also makes short "Free Talks" (legal information videos) available online which cover legal issues relevant to not-for-profit organisations and help them make timely, critical decisions on legal issues, thereby avoiding later costs or disputes.

We have just completed a small pilot "Honorary Counsel" scheme where a pro bono lawyer carries out a legal "health check" of a voluntary organisation by examining its main documents to identify any potential legal issues. The lawyer also becomes a long-term, trusted adviser who can be called on to give initial advice on further legal problems. The pilot has proved so successful that all three organisations and volunteers involved have agreed to continue with it. We plan to increase the scale of the pilot during the course of 2017.

LawWorks provides a unique service and as we are a membership organisation we can draw on a growing network of over 70 law firms and in-house legal teams, all of which have specifically registered with LawWorks to carry out pro bono work.

The NFPP fits very well into the aims of the Strengthening London's voluntary sector programme, in particular through its priority to broker services to enable small not-for-profits across London to receive free, high quality, specialist advice. As a result of advice received through the NFPP, small not-for-profit organisations have an increased understanding of legal issues and the confidence to deal with them, have greater confidence in dealing with third parties and report improved governance and efficiency, thereby meeting our chosen outcome.

We meet the "Principles of Good Practice" in the following ways:

- ? we request detailed feedback from voluntary organisations about the number of beneficiaries helped and how services to them have been improved;
- ? we request feedback about how our services can be improved and use this to build on future practices;
- ? we actively market our services to smaller organisations (to be eligible for the programme the organisation must usually have a turnover of £500,000 or less);
- ? we prepare annual reports on the programme's work which we share with stakeholders.

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

Do you have a Vulnerable Adults policy? **Yes**

What Quality Marks does your organisation currently hold?

LawWorks is a registered member of the Fundraising Regulator and is entitled to display a Fundraising Regulator badge to show our commitment to the highest standards in fundraising. In addition, the work of our volunteers is regulated by the Solicitors Regulation Authority.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

Broker help for 110 cases for small not-for-profit organisations assisted which support beneficiaries in London in year 1 of the funding, rising by 5% in year 2.

Market the programme effectively to attract 5 more member firms in year 1, rising by 5 more in year 2.

Successfully broker help for 95% of approved cases that meet our eligibility criteria.

Expand the Honorary Counsel pilot scheme to include 3 further small voluntary organisations (which support beneficiaries in London) in year 1 and a further 3 organisations in year 2.

Hold 3 training sessions for volunteer lawyers in London which are specifically aimed at understanding the legal needs of small not-for-profit organisations in year 1 and in year 2.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Increase the understanding of the majority (i.e. at least 60%) of small not-for-profit organisations assisted (which support beneficiaries in London) in relation to the particular types of legal issues that concern them

Give the majority (i.e. at least 60%) of small not-for-profit organisations assisted (which support beneficiaries in London) the confidence to deal with similar legal issues in the future;

Improve the governance and efficiency of the majority (i.e. at least 60%) of small not-for-profit organisations assisted (which support beneficiaries in London)

90% of small not-for-profits assisted (which support beneficiaries in London) to confirm that they would seek legal assistance from LawWorks again

95% of volunteer lawyers to confirm that they would take on more pro bono cases through LawWorks or recommend a colleague to do so

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

We plan to continue the Not-For-Profits Programme beyond the period of the grant we are seeking (it has already been operating successfully for over 15 years). We will continue to make applications to appropriate trusts and foundations for financial support, as well as using our unrestricted income to part-fund the project.

Who will benefit?

About your beneficiaries

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

110

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

51-60%

Funding required for the project

SEE
UPDATED
BUDGET
(ATTACHED)

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Project staffing	83,263	85,345	0	0
Other direct project costs	9,500	9,738	0	0
Rent (annual costs of a desk including rent, electricity, office supplies etc)	9,812	10,057	0	0
Governance	5,370	5,504	0	0
IT costs	1,966	2,015	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	109,911	112,659	0	0
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

SEE
UPDATED
BUDGET

Expenditure heading	Year 1	Year 2	Year 3	Total
Project Staffing	41,631	42,672	0	0
Other direct project costs	4,750	4,869	0	0
Rent (annual costs of a desk inc. rent, electricity, office supplies et)	4,906	5,029	0	0
Governance	2,685	2,752	0	0
IT costs	983	1,008	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	54,955	56,330	0	0
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Finance details

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

Financial year ended:	Month: December	Year: 2015
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Income received from:	£
Voluntary income	251,752
Activities for generating funds	0
Investment income	1,444
Income from charitable activities	607,360
Other sources	0
Total Income:	860,556

Expenditure:	£
Charitable activities	741,354
Governance costs	42,982
Cost of generating funds	26,092
Other	0
Total Expenditure:	810,428
Net (deficit)/surplus:	50,128
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	50,128

Asset position at year end	£
Fixed assets	2,995
Investments	0
Net current assets	257,118
Long-term liabilities	0
*Total Assets (A):	260,113

Reserves at year end	£
Restricted funds	1,000
Endowment Funds	0
Unrestricted funds	259,113
*Total Reserves (B):	260,113

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
21-30%

Organisational changes

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

In June 2016 we appointed a new Chair of Trustees, Alasdair Douglas, who is a former senior partner of a leading firm of solicitors and for five years chaired the City of London Law Society. In accordance with our current three year strategy, he has taken steps to reduce the number of trustees on the board from 17 to 10.

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.			
	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	177,660	236,800
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.			
Name of Funder	Year 3 £	Year 2 £	Most recent £
Big Lottery Fund	59,311	64,575	15,119
Legal Education Foundation	60,000	51,000	17,500
Together for Short Lives	30,000	30,000	30,000
Tudor Trust	30,000	11,250	45,500
John Ellerman Foundation	0	7,500	30,000

Declaration

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

Please confirm: Yes Full Name: **David Raeburn**

Role within **Director of Programmes & Deputy Chief Executive Officer**
Organisation:

REVISED BUDGET
(FOR 3-YEAR FUNDING)

LAWWORKS	NOT FOR PROFITS PROGRAMME BUDGET										CBT contribution		
	Year 1	Year 2	Year 3	Year 1	Year 2	Year 3	Year 1	Year 2	Year 3	Year 1	Year 2	Year 3	
PROJECT STAFFING	Salary	Empa.NIC	Training	Pension	Total Costs	Project Time	Project Cost	Year 1 ↑2.5%	Year 2 ↑2.5%	Year 3 ↑2.5%	CBT contribution		
											Year 1	Year 2	Year 3
Director of Programmes	46,436	5,282	929	2,592	55,239	20%	11,048	11,324	11,607	5,524	5,662	5,804	
Head of Not for Profits Programme	34,277	3,604	686	1,984	40,551	100%	40,551	41,565	42,604	20,276	20,782	21,302	
Not for Profits Programme Caseworker	26,236	2,494	525	1,582	30,837	100%	30,837	31,608	32,398	15,419	15,804	16,199	
Administrative Support Officer	23,522	2,119	470	1,446	27,557	9%	827	848	869	414	424	434	
Total staffing (FTE) and costs						223%	83,263	85,345	87,478	41,632	42,672	43,739	
OTHER DIRECT PROJECT COSTS													
Marketing and publicity						4,000				2,000	2,000	2,000	
Monitoring and evaluation of programme						1,000				500	500	500	
Staff travel						500				250	250	250	
INDIRECT COSTS							5,500	5,638	5,778	2,750	2,750	2,750	
Rent (223% of annual costs of a desk, inc. rent, electricity, office supplies etc)							9,812	10,057	10,309	4,906	5,029	5,154	
Governance (relevant proportion of annual total)							5,370	5,504	5,642	2,685	2,752	2,821	
IT costs (relevant proportion of annual total)							1,966	2,015	2,066	983	1,008	1,033	
TOTAL PROJECT COST							105,911	108,559	111,273	52,956	54,211	55,497	
												162,663	

MEETING: 20/09/2017

Ref: 14118

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Ethical Property Foundation

Adv: Joan Millbank

**Amount requested: £134,000
(Revised request : £150,000)**

**Base: Lambeth
Benefit: London-wide**

Amount recommended: £150,000

The Charity

The Ethical Property Foundation (EPF) was set up in 2004 in response to the voluntary and community sector's need for advice and information on property related matters. To date EPF has supported over 3,500 organisations across England and Wales with expert property advice, consultancy and education. Issues have included lease negotiation, valuation, rent reviews, finding an office and property refurbishment. In 2014 the charity launched 'Fairplace Award', its workplace accreditation scheme which recognises the socially and environmentally responsible management of buildings. Since 2015 EPF has been the sole referral partner with the Charity Commission for land and property advice, and undertakes a bi-annual Charity Property Matters Survey. From 2018 the charity will be renamed 'Fairplace Foundation'; no other governance changes are expected.

The Application

This application is for EPF to continue to provide a property advice service to benefit London voluntary and community organisations (VCS). The current three year grant concludes in September 2017; a further three year grant is sought. Building on learning and achievements to date, and taking into account London's changing property environment, EPF is seeking your support to continue and develop the range of property-related advice, information and education available to London's VCS.

The Recommendation

While being considered under the Strengthening London's Voluntary Sector programme this further request represents core funding as the continuation of this work is of strategic importance to London. Continuing support for organisations such as EPF, which provide vital infrastructure services to the sector, helps to add value to your other grant-making by ensuring that organisations have recourse to good quality, professional, advice and training. There is both a continuing and increasing need within London's VCS for access to good quality support on all aspects of property management. The Charity Property Matters Survey and direct referrals highlight changing trends and pressures within London's property market and the impact on VCS, for example, high rents, loss of commercial rental space, selling off of public buildings and asset transfers. Monitoring of the current grant has been consistently good and the value of the work was recently reviewed in a learning visit by your grants officers. The request has been increased following a review of costs at the assessment meeting.

£150,000 (£60,000; £50,000; £40,000) over three years towards core salaries and running costs to continue to provide a property advice service to benefit London's voluntary and community organisations.

Funding History

Meeting Date	Decision
25/09/2014	£147,500 over three years towards the provision of the London Property Advice Service to benefit London voluntary organisations..
17/02/2011	£110,000 over three years towards the salary and associated running costs of the London Property Advice Service

Background and detail of proposal

45% of respondents from the last Charity Property Management Survey felt that property was the biggest risk faced by their organisation. Through its services and support EPF seeks to build property management knowledge, skills and confidence within the VCS, helping groups to save money and secure their long term presence within the capital.

It will do this in London by continuing to deliver a multifaceted property advice service. The services will be delivered by its core property advice team made up of two part-time senior advisors and an assistant, with additional support from (currently 2) property professional volunteers. In addition EPF will use its register of property professionals, which include solicitors and surveyors, to offer specialist pro-bono and discounted advice and services. Administrative support will be provided through a Project and Office Coordinator with management support provided by the Chief Executive.

Over three years EPF will deliver 18 information and education workshops to benefit 250 VCS groups, followed by 18 advice clinics to provide tailored support to up to 60 groups: this support will target those groups with a turnover of under £250,000 per annum. In addition, the team will deliver one-to-one advice to 300 groups and link them into the register of property professionals as required: support is likely to cover all aspects of the property management including leasing, asset transfers, buying, premises budgeting, moving, property sharing, managing risk and hot desking. The website will be used to deliver free online materials, templates and guidance: 2,500 London VCS groups are expected to benefit. Your support will also help EPF to conduct two London versions of the Charity Property Matters surveys to chart emerging trends and issues. It works closely with The Centre for Accessible Environments and other organisations like local infrastructure groups, LandAid and Small Groups Coalition to promote its services, maximise its reach and share learning.

Financial Information

The charity has successfully taken action to improve its financial management and overall position. Grants and sponsorship are now shown as restricted income in forecast, and in September 2016 EPF ended the year with a surplus in unrestricted income; a small surplus is expected by September 2017. The cost of generating funds represents a proportion of the Chief Executive's time. The charity is reviewing its reserve policy to ensure effective future use.

Year end as at 30 September	2016	2017	2018
	Audited/Examined Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	212,876	225,720	225,000
- % of Income confirmed as at	n/a	100.00%	30%
Expenditure	(186,111)	(220,034)	(221,136)
Total surplus/(deficit)	26,765	5,686	3,864
Split between:			
- Restricted surplus/(deficit)	(11,514)	0	0
- Unrestricted surplus/(deficit)	38,279	5,686	3,864
	26,765	5,686	3,864
Cost of Raising Funds	5,360	7,883	7,922
- % of income	2.5%	3.5%	3.5%
Operating expenditure (unrestricted funds)	149,611	80,334	96,136
Free unrestricted reserves:			
Free unrestricted reserves held at year end	79,801	85,487	89,351
No of months of operating expenditure	6.4	12.8	11.2
Reserves policy target	37,403	20,084	24,034
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	42,398	65,404	65,317

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The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

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

Grant Request

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

Aims of your organisation:

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

Main activities of your organisation:

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

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
1	4	6	3

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Rented	rolling 12mth licence

Summary of grant request

1. Project need and why EPF?

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

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

2. How the work will be delivered

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

3. What our project will aim to achieve

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

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

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

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

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

4. We meet the Trusts 'Principles of Good Practice

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

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

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

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

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

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

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

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

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

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

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

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

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

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

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

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

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

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

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

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

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

Who will benefit?

About your beneficiaries

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

182,800

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

1-10%

Funding required for the project

Revised

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

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

What income has already been raised?

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

What other funders are currently considering the proposal?

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

How much is requested from the Trust?

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

Finance details

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

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

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

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

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

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

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

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

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

Declaration

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

Please confirm: Yes Full Name: **Antonia Swinson**

Role within **Chief Executive**
Organisation:

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MEETING: 20/09/2017

Ref: 14136

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

London Legal Support Trust

Adv: Sandra Jones

Base: City

Amount requested: £300,000

Benefit: London-wide

Amount recommended: £300,000

The Charity

The London Legal Support Trust (LLST), established in 2003, works to assist voluntary sector legal advice agencies and law centres in London and the Home Counties by providing them with a range of support including grant funding. LLST is part of a network of seven Legal Support Trusts across Wales and England working with the Access to Justice Foundation to support pro bono and advice agencies. The charity has four core strands of work in support of free legal advice services in London which are raising funds to distribute as grants; working collaboratively with others to raise funds for the free legal advice sector; supporting the improved management and infrastructure of the sector through the Centres of Excellence programme; and helping reduce costs and save money through pro bono or discounted schemes.

The Application

Your Committee supported this proposal in March 2014 as a Strategic Initiative, awarding £150,000 per annum over three years towards core salary and other costs to support the provision of Centre of Excellence in Greater London. This request is to extend the programme for a further two years from September 2017 and, now that the work is embedded, can be more readily considered as part of your standard programmes, albeit at a higher level than usual due to the scale of the work.

The Recommendation

LLST is a specialist and unique organisation that provides expertise to build the capacity of voluntary sector legal advice agencies and is ideally placed to support organisations to become Centre of Excellence. Monitoring provided for the preceding years funded by this Committee indicate that this project has exceeded targets, with 21 agencies having achieved Centre of Excellence status and a further 52 in the process. Continued investment in the LLST's work will help strengthen and improve the legal advice sector, funded through Investing In Londoners and will help it better meet the increasing needs of Londoners.

£300,000 over two years (2 x £150,000) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.

Funding History

Meeting Date	Decision
13/03/2014	£450,000 over three years (3 x £150,000) towards core salary and other costs to support the provision of Centres of Excellence in London.

Background and detail of proposal

Since 2013 LLST developed a strategy known as Centres of Excellence offering advice agencies support to attain Centre of Excellence status. The majority of the

grant funding distributed by LLST is directed towards those agencies having achieved Centre of Excellence status.

The LLST Centre of Excellence project provides funding and free management consultancy/ training to not for profit agencies delivering legal advice services. Those agencies applying will undergo a stringent 'MOT' undertaken by LLST and where an organisation might need to improve in order to attain Centre of Excellence status free consultancy/training support is provided.

LLST estimates that to turn an applicant organisation into a robust Centre of Excellence with improved for strength and sustainability costs an average of £20,000 - £25,000. Some of this comprises the cost of providing bespoke professional support needed and some is in the form of grant-aid to the organisation to free up their capacity to fully engage in the process and/or offset staff temporarily being taken away from front-line duties. The development process allows the organisation to plan and concentrate their efforts on improving both their services and their financial security for the future, which is often hindered by the current cycle of uncertainty and crisis management. The process also provides the opportunity for sharing best practice and developing a strategic focus across the sector in London.

Financial Information

LLST accounts show all income is unrestricted, none of which is from statutory sources. The majority comes from fundraising events, with donations from a number of lawyer practices, and a grant from City Bridge Trust. The cost of raising funds in 2016 was high for the charity; this was due to the costs incurred to put on a music gala; this was a one-off. The charity has included the CBT grant as unrestricted in their accounts. Officers have discussed this with the charity and in future the CBT grant will be considered as restricted.

Year end as at 31 December	2016 Audited Accounts £	2017 Forecast £	2018 Forecast £
Income & expenditure:			
Income	1,155,636	989,500	1,014,500
- % of Income confirmed as at 09/08/2017	n/a	85%	0
Expenditure	(1,162,647)	(977,177)	(989,399)
Total surplus/(deficit)	(7,011)	12,323	25,101
Split between:			
- Restricted surplus/(deficit)	0	0	0
- Unrestricted surplus/(deficit)	(7,011)	12,323	25,101
	(7,011)	12,323	25,101
Cost of Raising Funds	266,174	197,900	202,900
- % of income	23.0%	20.0%	20.0%
Operating expenditure (non-grant expenditure)	322,319	332,177	351,599
Free unrestricted reserves:			
Free unrestricted reserves held at year end	252,412	264,735	289,836
No of months of operating expenditure	9.4	9.6	9.9
Reserves policy target	161,160	166,089	175,800
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	91,253	98,647	114,037

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: London Legal Support Trust	
If your organisation is part of a larger organisation, what is its name? London Legal Support Trust	
In which London Borough is your organisation based? City	
Contact person: Ms Vicky Ling	Position: Interim Chief Executive
Website: http://www.londonlegalsupporttrust.org.uk	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1101906
When was your organisation established? 01/01/2003	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More people accessing debt and legal services More organisations with improved skills in financial management
Please describe the purpose of your funding request in one sentence. To support third sector legal advice organisations in becoming more sustainable through strategic grant-making, sharing good practice and encouraging partnership working.
When will the funding be required? 01/09/2017
How much funding are you requesting? Year 1: £150,000 Year 2: £150,000 Year 3: £0 Total: £300,000

Aims of your organisation:

The Trust funds voluntary sector legal agencies in London and the home counties that provide free legal advice to poor and/or disadvantaged members of the public, and network organisations that support these legal agencies. It works with other funders, eg. the Future Advice Fund, to increase its impact (eg. a joint fundraising course).

It funds new social welfare legal advice provision and prioritises legal services that encourage or provide co-operation between agencies and volunteers from private practice.

It provides one-off capital support to increase capacity. It prioritises applications which the Trust considers will assist agencies to lever in additional funds from other sources.

LLST supports organisations which are progressive and client-centred. It operates 'Centres of Excellence', which is a diagnostic scheme to identify agencies' strengths and weaknesses, to identify the best forms of support (eg. management consultancy, brokering relationships, fundraising support, money-saving) which can be given and help them improve service delivery and infrastructure, to promote long-term sustainability.

Main activities of your organisation:

1. Raising funds to distribute as grants - The main fundraising activity of the Trust is the London Legal Walk (it also runs other walks/ events). The 2017 Walk had around 12,000 walkers in over 650 teams. We expect to raise £800,000 this year. It is supported by 100 Judges, the 50 largest law firms in London, hundreds of smaller ones and voluntary organisations (which can keep 100% of the funds they raise through this high-profile event). The Law Society is the headline sponsor.

2. Working collaboratively with others to raise funds for the advice sector - eg. the Legal Education Foundation, which applied to CBT for 6 solicitors' training contracts to be offered by Centres of Excellence.

3. Supporting the improved management and infrastructure of the voluntary advice sector, eg. through the 'Centres of Excellence' scheme.

4. Helping to reduce costs and save money through pro bono or discount buying schemes, utilising the skills of a specialist procurement volunteer.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
3	2	12	17

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Rented	3 years

Summary of grant request

1. The need for the project

In 2012-13 there were 870 NfP legal aid providers. In 2013-14 there were just 95 - a fall of 90%. The impact of legal aid cuts, combined with local government spending cuts and other funding changes, has been estimated to take over some £100 million annually out of the advice economy in England and Wales. The impact is disproportionately serious in London due to higher levels of deprivation. Due to our work with legal advice centres we know that they need support to make their management more effective to make the most of their existing funding and generate additional funds.

2. How the work will be delivered

The LLST Centre of Excellence/MOT (COEx) provides funding and free management consultancy/training to NfP agencies delivering legal advice services. Each agency carries out a self-assessment against a range of good practice indicators (see below). These are assessed by a sector specialist. LLST provides and/or brokers funding and other forms of support to enable the agency to reach or maintain COEx status. LLST has developed a costs-saving scheme and has knowledge base in relation to charity reliefs and discounts, VAT, energy costs, cost effective IT solutions.

3. What your project will aim to achieve

The COEx project will continue to assist individual agencies to identify where there may be threats to their sustainability and provide practical support so they can develop strategies to overcome those threats and develop opportunities. LLST will continue to encourage the COEx and other agencies to set up new free and pro bono advice services.

4. Why you are the right organisation to deliver the work

Between them, LLST's staff have decades of experience in working with the nfp legal advice sector. LLST also contracts with expert consultants for additional support where required. LLST works with agencies which are members of the main advice networks, AdviceUK, Citizens Advice, Law Centres Network, and Shelter. It is in an excellent position to share expertise and good practice across networks.

5. How your project will meet the Trust's programme outcome under which you are applying

LLST asks agencies to monitor and report the numbers of people they help by problem category, which enables LLST to identify whether more people are accessing debt and legal services. It monitors the number of new advice sessions compared to emergency 'keeping doors open' applications. The former have grown and the latter decreased since the COEx scheme started.

The COEx covers: management and governance; risk, business planning and strategy; financial management; quality and compliance. Agencies reflect on their annual progress in each area and identify issues which need further development, supported through LLST where possible.

6. How your project meets the Trust's 'Principles of Good Practice'

LLST tracks the cascade benefit of the support-service we provide by monitoring development in each agency year on year through self-assessment and external assessment by a sector-specialist consultant.

LLST involves the organisations we support in the continuous improvement of our own services through questionnaires. This has resulted in work to improve communication about the way the scheme works.

LLST has established wide recognition throughout the sector. Many of the COEx have been forced to reduce in size in recent years so LLST supports a number of smaller agencies.

LLST has been working with the Future Advice Fund to share learning by the COEx about profile development in order to promote fundraising with the wider sector. Initiatives are also publicised through the Legal Voice website and events and through the London Funders network.

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

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

None

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

To increase the numbers of legal advice agencies achieving COEx status to 32 in 2017-8 and 40 in 2018-19.

To embed the COEx assessment process in agencies already in the process by encouraging them to submit 32 self assessment reports and carrying out 10 assessment visits in 2017-8 (assessment visits are carried out every 3 years) and 40 self assessment reports and carrying out 14 assessment visits in 2018-19.

Provide 3 group learning development opportunities per year for COEx and other agencies, to raise awareness of the COEx scheme and encourage additional agencies to work towards COEx status.

Provide grants totalling £384,000 to 32 COEx agencies in 2017-18 and £480,000 to 40 COEx agencies in 2018-19

In 2018-19 To evaluate the effectiveness of the COEx in promoting sustainability by undertaking an evaluation exercise of those agencies which joined the scheme in 2014 and 2015 (20 agencies).

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

By providing increased funding to COEx agencies to deliver new free or pro bono legal advice services in housing, debt, welfare benefits, immigration or employment. This would support vulnerable individuals in the community to access justice and promote well-being.

By providing increased funding to COEx agencies to keep the doors open of a legal advice session in housing, debt, welfare benefits, immigration or employment. This would support vulnerable individuals in the community to access justice and promote well-being.

By providing COEx agencies assessment and feedback opportunities against good practice management criteria, to enable them to diversify their funding base and strengthen their resilience.

By providing COEx agencies and others the opportunity to share good practice in fund-raising and financial management, enable them them to diversify their funding base and strengthen their resilience.

By sharing the experience of the COEx agencies and other LLST beneficiary advice agencies with other funders, to spread awareness of the social issues in the community requiring legal advice by end-users. Also, spreading awareness of the issues affecting agencies providing legal advice services to disadvantaged groups.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

Yes. LLST is re-structuring to allow the CEO to concentrate on planning and strategic development. The trustees have set a a long-term target of increasing fundraising to £5m a year to support 50 COEx. LLST expects that by 2020 significant progress will have been made towards this.

Who will benefit?

About your beneficiaries

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

100

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Salaries, NI and pensions	218,957	231,091	231,091	0
Payroll costs, Training, Accommodation, IT	19,220	19,308	19,308	0
Direct fundraising costs of events	60,000	60,000	60,000	0
Audit, finance, governance	3,000	3,000	3,000	0
Development, Comms, COEx consultancy	15,000	15,000	15,000	0
Grant-making	645,000	645,000	645,000	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	977,177	989,399	989,399	0
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
London Legal Walk	800,000	0	0	0
Please see note re years	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	800,000	0	0	0
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
N/A	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Contribution to all headings above	150,000	150,000	0	0
Please see note re years	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
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Finance details

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

Financial year ended:	Month: December	Year: 2016
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Income received from:	£
Voluntary income	234,679
Activities for generating funds	918,059
Investment income	2,898
Income from charitable activities	0
Other sources	0
Total Income:	1,155,636

Expenditure:	£
Charitable activities	840,328
Governance costs	8,856
Cost of generating funds	266,174
Other	47,289
Total Expenditure:	1,162,647
Net (deficit)/surplus:	-7,011
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	-7,011

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	245,401
Long-term liabilities	0
*Total Assets (A):	245,401

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	245,401
*Total Reserves (B):	245,401

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

The CEO left the organisation in March 2017. Vicky Ling was appointed as interim CEO (having had an induction period from December 2016 - March 2017). Recruitment to the permanent CEO role commenced in May and it is hoped that a permanent post-holder will be selected in July.

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
None	0	0	0
	0	0	0
	0	0	0
	0	0	0
	0	0	0

Declaration

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

Please confirm: Yes Full Name: **Vicky Ling**

Role within **Interim CEO**
Organisation:

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MEETING: 20/09/2017

Ref: 14000

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Project Oracle Evidence Hub

Adv: Tim Wilson

Base: Lambeth

Amount requested: £90,000

Benefit: London-wide

Amount recommended: £90,000

The Charity

Initiated as a project hosted by the Greater London Authority, and subsequently managed by London Metropolitan University, Project Oracle Evidence Hub (Oracle) became a registered charity in June 2016. Oracle is concerned with improving the standards of evidence used by children and youth organisations in their programme operations, and by funders in the commissioning they undertake. In addition to improvements by individual organisations, Oracle also works to develop a community that shares and learns from evidence so that, in time, the most effective approaches to children and youth work are pursued.

The Application

Following registration with the Charity Commission and the end of term of establishment funding from the Mayor's Office for Policing and Crime, Economic and Social Research Council, and Greater London Authority, Oracle is now approaching several Trusts and Foundations for core support. The request to City Bridge Trust is towards the costs of their planned work with London-based organisations. Activities will concentrate on improvements to monitoring and evaluation with a range of training, mentoring and volunteer placements available for charity clients. City Bridge Trust will subsidise work that clients would otherwise pay for in full.

The Recommendation

Whilst there are several organisations offering monitoring and evaluation support to London's voluntary sector, Oracle's approach is of particular note given its concern to map the most effective approaches in a particular sector. At a time when grant funding is under pressure and commissioners are challenged to spend their budgets as effectively as possible, Oracle's interest in 'what works' is welcome. The charity has a strong board drawn from academia, the private and non-profit sectors and is led by a former manager of the Government Economics Service. Funding is advised:

£90,000 over three years (3 x £30,000) towards the costs of Project Oracle's work to improve the quality and quantity of evidence in the children and youth sector in London.

Funding History

None.

Background and detail of proposal

Oracle has worked with around 200 organisations to date. It delivers training events and more in-depth one-to-one support to validate organisational evaluation data against the Oracle Standards of Evidence. Researchers are also placed in host organisations to work on evidence gathering and reporting, and learning events bring charities together to share practice with one another. In turn, Oracle has

commissioned evaluation of its own work and now plans to develop its operations nationally (this latter ambition is not part of the application to the Trust).

Costs requested from City Bridge Trust are equivalent to validation work with five London projects each year, 15 training places each year and placements for five student researchers. Some funding has already been secured from the Esmée Fairbairn and Paul Hamlyn Foundations, with a number of other requests pending to get Oracle to its target for 2017-18.

Financial Information

The three years covered by the table below show substantial variation in turnover. However, this is slightly misleading to the true position. In 2015-16, examined accounts cover work done by the body pre-dating the current registered charity. During this year some Oracle activities were managed by a team at London Metropolitan University which held a budget for this work, but whose activities are not covered by the examined accounts. All funding for Oracle activities was consolidated in the charity in 2016-17. This partly explains the sharp rise in turnover. The rise is also attributable to some work (and its associated funding) which had been deferred from 2015-16 to 2016-17. Forecast turnover in 2017-18 is more reflective of the norm Oracle expects going forward.

Cost of raising funds is shown as zero in 2015-16 because Oracle filed its accounts as a micro-entity online with HMRC and fundraising is not an expenditure category the online portal recognises. In the most recent, and forthcoming years Oracle expects to spend 10 – 16% of its income on fundraising.

Year end as at 31 July	FY 2015-16	FY 2016-17	FY 2017-18
	Examined Accounts	Draft Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	74,131	345,400	192,400
- % of Income confirmed	n/a	100%	43%
Expenditure	111,557	267,400	234,800
Total surplus/(deficit)	(37,426)	78,000	(42,400)
Split between:			
- Restricted surplus/(deficit)	(17,500)	0	0
- Unrestricted surplus/(deficit)	(19,926)	78,000	(42,400)
	(37,426)	78,000	(42,400)
Cost of Raising Funds	0	35,000	30,000
- % of income	0.0%	10.1%	15.6%
Operating expenditure (unrestricted funds)	94,057	207,400	132,400
Free unrestricted reserves:			
Free unrestricted reserves held at year end	3,712	81,712	39,312
No of months of operating expenditure	0.5	4.7	3.6
Reserves policy target	23,514	51,850	33,100
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(19,802)	29,862	6,212

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Project Oracle Evidence Hub	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based? Lambeth	
Contact person: Ms Amy Thomas	Position: Communications and Fundraising Officer
Website: http://www.project-oracle.com	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 1167555
When was your organisation established? 08/06/2016	

Grant Request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More organisations with improved capabilities in monitoring, evaluation and impact reporting
Please describe the purpose of your funding request in one sentence. Continue to improve the quality and quantity of evidence in the children and youth sector to secure better outcomes for its beneficiaries in London.
When will the funding be required? 01/08/2017
How much funding are you requesting? Year 1: £30,000 Year 2: £30,000 Year 3: £30,000 Total: £90,000

Aims of your organisation:

Our aim is to improve outcomes for children and young people by building the capacity of children and youth (CYP) organisations and funders to develop and commission evidence-based projects, creating a community in which evidence is widely gathered, used and shared.

At the heart of our model is the alignment of project evaluations with our Standards of Evidence through the validations process. The Standards meet the needs of both CYP organisations and funders, helping each to navigate the conversation around evidence and set realistic expectations. We encourage CYP organisations to achieve the highest feasible standard, supporting them to gather better evidence through training, online resources, and research placements.

We also promote an evidence-based approach to funding and commissioning youth services, by encouraging funders and commissioners to embed the Standards into their processes through seminars and bespoke support. This ensures the most effective CYP programmes are supported to continue and expand.

Main activities of your organisation:

We have developed a range of core support options:

- One-to-one support towards validation: Reaching validation against the Standards of Evidence is an iterative process that requires advice and troubleshooting along the way. Project Oracle provides comprehensive guidance and rigorous feedback at each stage.

- Training: We run full-day and half-day workshops that cover a range of evaluation topics for different levels of expertise.

Research placements: We work with universities to identify masters and PHD students who want to explore the impact of their research in a real-world setting, and then match these researchers with organisations in need of their support.

- Impact Pioneers: We form small groups of CYP organisations, academics and funders, within specific segments of the CYP sector, and offer them a tailored programme of support to improve their evidence.

- Evidence Champions: We run seminars and facilitate a peer network for funders and commissioners designed to embed evidence at every stage in the commissioning process.

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
4	4	10	15

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Rented	2 years, 6 month break clause

Summary of grant request

Pockets of disadvantage and violence persist across the UK and, in the context of economic downturn and austerity, this has led to a growing need for evidence of what works in improving outcomes for children and young people. The principal barriers to evidence-based practice for CYP organisations are most often a lack of time, skill and money to dedicate to evaluation. Similarly, funders and commissioners often lack the expertise to discriminate between good and bad evidence when trying to fund 'what works'.

Project Oracle supports CYP organisations to evaluate in ways that are flexible and affordable, so they can understand what they are doing well, enabling them to develop and refine their projects. At the same time, we collaborate with academics and experts to provide low-cost high-rigour support. And we work with funders and commissioners to help them adopt an evidence-based approach, so that public money can be spent on the most promising interventions.

The support we offer comprises a range of activities related to our Standards of Evidence. These activities include training and one-to-one support sessions to review CYP organisations' approaches to evidence and evaluation and to help them progress towards validation; research placements of graduate students with organisations needing specialised evaluation support; seminars and bespoke support for commissioners and funders such as MOPAC, the GLA and Islington Council.

So far, we have worked with 200 organisations to help them achieve validation of over 220 different projects. We have provided over 900 training opportunities, placed over 50 researchers in children and youth organisations, published 6 Synthesis Studies and 3 Evidence Digests and developed the innovative Impact Pioneers Programme. We have also held a number of events bringing together the Project Oracle community including regular 'launch events' promoting key work streams and 'learning events' encouraging the sector to come together and share their learning. We also hold a larger scale 'annual event' each year providing a platform for networking and collaboration within the sector.

We have commissioned two external evaluations between 2014-2016 both of which found evidence of our impact, suggesting the Project Oracle approach works. In the coming years, we will continue tracking the benefits of our service by commissioning further external evaluations. In addition, we have designed a range of feedback forms for use at trainings and events and collect detailed feedback from participants to improve our training offer and identify the most useful topics for future trainings. In the past year, we have been developing a database to help us manage our data more effectively, and better understand the user journey.

We offer our services at a highly subsidised rate and encourage smaller, less well-resourced organisations to contact us if they are unable to afford our fees. We regularly offer discounts on training and validation submissions to ensure easy access for all. Furthermore, all our online resources and guidance are offered completely free of charge for the benefit of all CYP organisations.

Project Oracle aims to address the question of 'what works' through providing organisations of all sizes with the support and resources they need to evidence their work, and make sure the findings are shared across the sector. Our aim is to make good quality evaluation and learning from evidence accessible to all and to spread good practice through regular events. We also promote validated projects on our website and through social media.

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

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

We will provide 1:1 support towards validation against the Project Oracle standards to 5 CYP organisations in London each year.

We will place 5 student researchers in 5 CYP organisations in London, with a focus on providing support to projects aiming for Standard 2 and above each year.

We will provide 15 training places per year covering topics identified as areas of challenge by CYP organisations.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

By supporting more organisations to achieve validation, particularly at the higher standards, we will improve the overall quality and availability of good evidence in the CYP sector.

By brokering Research Placements, with an emphasis on supporting projects working towards Standard 2 validation, we hope to see more projects undertaking evaluations and producing good quality reports that are widely shared and understood throughout the sector.

By providing training we will continue to build capacity in the children and youth sector, through a better understanding of evaluation approaches and learning from evidence.

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

We are developing a fundraising strategy and have a dedicated Communications and Fundraising Officer to see this through, with the support of the Chief Executive and Project Oracle board. We will research new fundraising opportunities and submit bids to potential funders on a rolling basis. We will also apply to existing funders to extend current funding each financial year.

Who will benefit?

About your beneficiaries

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

0

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

0%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Support for validations	40,000	40,000	40,000	120,000
Research placements	30,000	30,000	30,000	90,000
Training	20,000	20,000	20,000	60,000
Impact Pioneers (Arts Cohort + Youth Justice Cohort)	100,000	100,000	100,000	300,000
Academic & funder engagement and events	20,000	20,000	20,000	60,000
Other learning events	15,000	15,000	15,000	45,000
Comms & website	25,000	25,000	25,000	75,000
Fundraising & development	50,000	50,000	50,000	50,000
	0	0	0	0

TOTAL:	300,000	300,000	300,000	900,000
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What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
The Paul Hamlyn Foundation	30,000	0	0	30,000
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	30,000	0	0	30,000
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What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
A New Direction	25,000	0	0	0
Porticus	30,000	30,000	30,000	0
Fidelity Foundation UK	50,000	0	0	0
	0	0	0	0

TOTAL:	105,000	30,000	30,000	0
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How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Support for validations	10,000	10,000	10,000	30,000
Research placements	15,000	15,000	15,000	45,000
Training	5,000	5,000	5,000	15,000

TOTAL:	30,000	30,000	30,000	90,000
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Finance details

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

Financial year ended:	Month: July	Year: 2016
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Income received from:	£
Voluntary income	0
Activities for generating funds	0
Investment income	0
Income from charitable activities	74,010
Other sources	121
Total Income:	74,131

Expenditure:	£
Charitable activities	111,374
Governance costs	0
Cost of generating funds	0
Other	0
Total Expenditure:	111,374
Net (deficit)/surplus:	-37,243
Other Recognised Gains/(Losses):	0
Net Movement in Funds:	0

Asset position at year end	£
Fixed assets	284
Investments	0
Net current assets	3,428
Long-term liabilities	0
*Total Assets (A):	3,712

Reserves at year end	£
Restricted funds	0
Endowment Funds	0
Unrestricted funds	3,712
*Total Reserves (B):	3,712

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

In June 2016 Project Oracle Evidence Hub became a registered charity. Prior to this Project Oracle Evidence Hub was both a partnership between London Metropolitan University and The Social Innovation Partnership, funded by the GLA, MOPAC and ESRC, and from 14 July 2014, a non-profit company limited by guarantee. The most recent accounts and answers below relate only to the CLG.

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	300,000	300,000	300,000
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
Paul Hamlyn Foundation	0	0	0
	0	0	0
	0	0	0
	0	0	0
	0	0	0

Declaration

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

Please confirm: Yes Full Name: **Amy Thomas**

Role within **Communications and Fundraising Officer**
Organisation:

MEETING: 20/09/2017

Ref: 14143

ASSESSMENT CATEGORY - Strengthening London's Voluntary Sector

Small Charities Coalition

Adv: Tim Wilson

Base: Lambeth

Amount requested: £100,164

Benefit: London-wide

Amount recommended: £100,000

The Charity

Established in 2007 to address the lack of support available for smaller organisations, the Small Charities Coalition (SCC) has over 8,000 members across the UK, 35% of which are London-based. 'Small' is defined as an annual income of less than £1m. SCC provides a first point of contact service for people starting new charities, opportunities for networking and guidance across a wide-range of support needs. This is achieved with relatively few staff as SCC works in collaboration with larger charities, corporates, and individual mentors to broker tailored support. SCC is about to launch a new strategy to expand membership and deliver assistance via an online portal. There are approximately 160,000 registered charities with annual turnover of less than £1m, and a further 600,000 micro charities with turnover below £5k that are below the mandatory threshold for registration, so there is considerable capacity for expansion. SCC charges no membership fee.

The Application

City Bridge Trust has funded SCC's *Building Resilience* programme in London since 2012 and it is a continuation of this scheme which is subject to today's request. With a core focus on governance capabilities, *Building Resilience* looks at the elements of a successful organisation and provides opportunities to strengthen financial skills, monitoring, collaborative working and trustee recruitment. During its previous three years of operations the programme reached over 2,000 beneficiaries through events, mentoring, telephone helpline, email support and the provision of online information.

With further Trust support SCC plans to deliver 118 events for over 1,400 people, support 86 mentoring matches and approximately 500 queries. SCC has expanded its mentoring network since it was first funded, and plans to manage a greater volume of support provision as a result of a new online portal.

The Recommendation

SCC is a well-regarded organisation with a strong network of support-providers from the private and third sectors. The previous award was well reported. The charity has recently changed CEO, and seen several new trustees join the board. It is managing this period well, and it is anticipated that, with the launch of the new online portal as well as a push to expand membership, SCC will become an even more influential organisation in coming months. Funding is advised as follows:

£100,000 over two years (2 x £50,000) for the delivery of the Building Resilience programme by Small Charities Coalition in London.

Funding History

Meeting Date	Decision
31/05/2012	£142,000 over three years towards the costs of the 'Building Resilience' programme.

Background and detail of proposal

Among the findings of SCC's recent membership survey was the time and financial constraints that many smaller organisations face when they wish to learn. On average, a typical member reported they had only £300 - £500 to spend on training each year across their entire organisation. SCC notes continued demand for the free, personalised support offered through *Building Resilience*. The organisation is planning for continued delivery after the next two years through increased engagement with corporate partners.

Financial Information

SCC has set an ambitious income target for 2017-18 which would build unrestricted reserves to just over 11 months' worth of operating expenditure by year end. This is the responsibility of the charity's new CEO (who has a background in fundraising) and will see a new focus on income diversification through targeting new corporate partners. If the forecast is realised, SCC plans to use the additional free reserves to help manage the costs of its new online portal, membership growth, and the development of new services. 2017-18 will be a 10 months due to a planned change in SCC's financial year end.

Year end as at 31 May	FY 2015-16	FY 2016-17	FY 2017-18
	Examined Accounts	Draft accounts	10 month forecast
	£	£	£
Income & expenditure:			
Income	173,006	313,014	331,722
- % of Income confirmed	n/a	n/a	60%
Expenditure	154,184	269,016	240,043
Total surplus/(deficit)	18,822	43,998	91,679
Split between:			
- Restricted surplus/(deficit)	11,346	52,096	48,521
- Unrestricted surplus/(deficit)	7,476	(8,098)	43,158
	18,822	43,998	91,679
Cost of Raising Funds	13,200	25,995	20,425
- % of income	7.6%	8.3%	6.2%
Operating expenditure (unrestricted funds)	40,179	147,186	124,822
Free unrestricted reserves:			
Free unrestricted reserves held at year end	81,041	72,943	116,101
No of months of operating expenditure	24.2	5.9	11.2
Reserves policy target	20,090	73,593	62,411
No of months of operating expenditure	6	6	6
Free reserves over/(under) target	60,951	(650)	53,690

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

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

Grant Request

Under which of City Bridge Trust's programmes are you applying? Strengthening London's Voluntary Sector
Which of the programme outcome(s) does your application aim to achieve? More organisations with improved capabilities in monitoring, evaluation and impact reporting More organisations with improved skills in financial management
Please describe the purpose of your funding request in one sentence. Building skills, knowledge and confidence within small charities in London across financial management, monitoring & evaluation and governance.
When will the funding be required? 01/09/2017
How much funding are you requesting? Year 1: £50,082 Year 2: £50,082 Year 3: £0 Total: £100,164

Aims of your organisation:

The promotion of Small Charities for the benefit of the public including but not limited to:
Liaising with Small Charities, other voluntary organisations, government agencies and other groups on relevant issues;

- Providing training, conferences and seminars on subjects relevant to the efficacy of Small Charities;
- Identifying needs of Small Charities and establishing projects or policies to address them;
- Providing information to the press and the public in respect of Small Charities;
- Providing services such as legal, accountancy and management advice services to Small Charities;
- Providing advice and information on fundraising and volunteering for Small Charities;
- and acting as a representative of Small Charities in relation to government policies and legislation.

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

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

Main activities of your organisation:**Mentoring**

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

Information and Guidance

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

Events Programme

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

Policy & Engagement

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

Community Portal (Autumn 17)

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

Number of staff

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

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?
Leased	9 months

Summary of grant request

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

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

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

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

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

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

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

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

Not at present.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

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

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

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

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

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

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

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

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

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

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

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

Who will benefit?

About your beneficiaries

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

1,009

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

London-wide (100%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

21-30%

Funding required for the project

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

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

What income has already been raised?

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

What other funders are currently considering the proposal?

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

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Salary costs relating to training and events in London*	24,140	24,140	0	48,281
Salary costs relating to Mentoring matches in London*	8,780	8,780	0	17,561
Salary costs relating to Information and Guidance in London*	5,062	5,062	0	10,124
Events costs	4,500	4,500	0	9,000
Volunteer expenses	864	864	0	1,728
Staff expenses, travel & training	1,260	1,260	0	2,520

Office costs, phones, computers, stationary & printing	1,530	1,530	0	3,060
Email credits	900	900	0	1,800
Contribution to overheads @ 12%	3,046	3,046	0	6,091
TOTAL:	50,082	50,082	0	100,165

Finance details

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

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

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

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

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

* Please note that total Assets (A) and Total Reserves (B) should be the same.

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
0%

Organisational changes

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

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

Previous funding received

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

	Year 3 £	Year 2 £	Most recent £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	0	0	0
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder	Year 3 £	Year 2 £	Most recent £
The Legal Education Foundation	17,500	17,500	0
Lloyds Bank Foundation	50,819	19,991	0
The Tudor Trust	30,000	30,000	30,000
Esmée Fairbairn Foundation	50,000	0	0
Garfield Weston Foundation	50,000	0	10,000

Declaration

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

Please confirm: Yes Full Name: **John Barrett**

Role within **Chief Executive**
Organisation:

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Committee(s)	Dated:
City Bridge Trust	20th September 2017
Subject: Extension of support for young people and families in the North Kensington area	Public
Report of: David Farnsworth, Chief Grants Officer	For Decision

Summary

This report summarises the recent support you gave to provide a summer programme of activities for young people and their families living in and around the Grenfell Tower area and requests your agreement for funds to be made available to continue that support through to September 2018.

Recommendation

Members are asked to:

- Agree to earmark up to £100,000 from your Investing in Londoners grants budget to enable the Trust to join in a consortium of funders providing grants to local organisations to provide year-round out-of-school activities and support to young people and their families in the Grenfell/North Kensington area.

Main Report

Background

1. In late July a consortium of funders (including the Royal Borough of Kensington & Chelsea) came together under the direction of the John Lyon's Charity (JLC) to consider urgent funding to provide positive summer activities for young people living in and around the Grenfell area.
2. Within a matter of days a common application form was devised for local organisations to apply. These were pre-assessed by JLC and posted on a closed portal constructed by London Funders through which individual funders could select which, if any, they wished to support.
3. Your Trust was one of the first to award grants under this process – making 18 grants for a total sum of £114,840 – and in time for the start of the holidays. Early

reports on some of these grants highlight how valuable they were and how, in some instances, they have really helped people to cope.

Current Position

4. Your involvement in this consortium was extremely timely and effective and, from views taken “on the ground” by John Lyon’s charity, very much appreciated by the beneficiaries. The speed with which you made decisions and then communicated with groups was exemplary. It was also rewarding for the Trust to be part of a consortium of like-minded funders working within a common framework.
5. Now that the summer school holidays have ended the consortium of funders met again to review the processes that were used and to consider a more planned approach to supporting children & young people in that area over the year ahead, to next September. There was full agreement that regular, supportive, activities should be provided across the wider area on an ongoing basis but that these should be set against more fully assessed need and organisational capacities.

Proposal

6. The consortium is due to meet again on 19th September to finalise the criteria for ongoing funding and the application and assessment process. It is likely that the target for support will be defined under three categories: young people’s mental health; positive activities in out of school hours; and support for families with young children. Groups will be given a brief period in which to apply – again using a common application form and closed portal process – although there will now be time for the funders to sit around a table to discuss applications and share information. This process will also consider other Grenfell-related funding which the applicant organisations may have received.
7. As with the process for the summer holiday funding, it will be for each individual funder within the consortium to decide which, if any, of the applications it wishes to support. As no single grant is likely to be above £50,000 in total (and many will be for much less) individual grants deemed suitable for City Bridge Trust would then be considered under your delegated authority process.
8. In this regard it would greatly help your officers, when taking part in the panel discussions and decisions over the next few weeks, to know how much the Trust could contribute to the overall sum. It is recommended, therefore, that you make available a total sum of £100,000 for this purpose. Individual grant recommendations would, in due course, be presented under delegated authority and reported back to your Committee in the usual way. Given that some of the projects proposed for funding may not fit fully within your standard Investing in Londoners criteria it is advised that any grants made be considered as “Exceptional”.¹

¹ Your policies allow you to make grants (deemed “Exceptional”) outside your published priorities to enable the Trust to respond to new needs and circumstances which have arisen since you fixed your priorities.

Conclusion

9. The Trust made a significant and effective contribution to supporting young people over the summer holidays in the wake of the Grenfell fire. Nevertheless, the particular circumstances at the time meant that that process was weighted towards speed of distribution of funds. Now, however, there is an opportunity to take a little bit more time to give applicants more guidance and support; and to assess bids in a more complete context and with an emphasis on funding high-quality and sustainable activity.

Ciaran Rafferty

Principal Grants Officer

T: 020 7332 3186

E: ciaran.rafferty@cityoflondon.gov.uk

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Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Applications recommended for rejection	Public
Report of: Chief Grants Officer	For Decision

Summary

This report and the accompanying schedule outlines a total of 11 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 11 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.

Ciaran Rafferty
Principal Grants Officer
T: 020 7332 3186
E: ciaran.rafferty@cityoflondon.gov.uk

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Recommended for Rejection
The City Bridge Trust Committee – 20th September 2017
Summary of Recommendations for Rejection - Investing in Londoners

Request Date	Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Grants Amount Requested & Area Officer
<u>Improving London's Environment</u>				
June 2017	14147 Thames Estuary Partnership	To employ an Education Officer to improve environmental and cultural education about the Thames through riverside interpretation and development of collaborative projects with key partners.	Application has similar outcomes to previous grant. The appropriate fallow period has not passed between grants.	£184,670 JXJ Camden
July 2017	14186 The Starting Out Charity	We want to convert our volunteer transport run on veg oil and solar power to showcase a fuel option reducing carbon emissions and costs.	Proposal does not meet any of your priorities. Incomplete application.	£4,995 CR Islington
<i>Total Improving London's Environment (2 items)</i>				£189,665
<u>Improving Londoners' Mental Health</u>				
August 2017	14239 Best Beginnings	Piloting a community approach to tackling perinatal health inequalities by training and supporting local Champions in using Baby Buddy app to promote mental health.	A huge request for two years' funding from an organisation with very low free reserves, for a programme to encourage and teach people how to use a free app.	£314,143 CR Southwark
<i>Total Improving Londoners' Mental Health (1 item)</i>				£314,143

Request Date	Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Grants Amount Requested & Area Officer
<u>Making London More Inclusive</u>				
July 2017	14233 Kingsgate Community Association	To provide life enhancing training and development opportunities for residents of Kilburn experiencing deprivation, perceived discrimination and low self-esteem.	A confusing application where the organisation appears to be requesting funds to develop its own capacity rather than to deliver any of your specific outcomes	£95,100 CR Camden
<i>Total Making London More Inclusive (1 item)</i>				£95,100
<u>Making London Safer</u>				
July 2017	14173 Afghanistan and Central Asian Association	The Lotus project will provide support: translation, advocacy and advice, to victims of domestic violence empowering them to make choices that result in personal safety.	The applicant has not evidenced any track record of working with survivors of domestic violence, nor do they work with organisations that do work with DV. This is identical to an application that they submitted in March 2017 and subsequently withdrew in order to revise.	£98,886 SJ Hounslow
<i>Total Making London Safer (1 item)</i>				£98,886
<u>Older Londoners</u>				
June 2017	14180 Lambeth GP Food Co-op	To support GP practices and the wider primary care community to build food-growing gardens in new locations across London; creating a vibrant and resilient network.	An ambitious request for work which doesn't quite fit with your Older Londoners priorities and where a significant element of the grant (if awarded) would pay for salaries in another organisation.	£198,500 CR Lambeth
<i>Total Older Londoners (1 item)</i>				£198,500

Request Date	Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Grants Amount Requested	Officer & Area
<u>Reducing Poverty</u>					
April 2017	13978 Ealing Equality Council	Access to advice and support services for people suffering poverty, deprivation, and destitution.	The organisation provided poorly presented financial information in their application. During the assessment process they did not allay your officer's concerns on capabilities in this regard.	£75,000	SAR Ealing
June 2017	14169 Energy Solutions	Creating new channels and mechanisms for engaging local communities in reducing energy consumption and reducing fuel poverty for vulnerable people	The application does not meet your objectives as set out in the 'Reducing Poverty' programme.	£66,627	JXM Brent
<i>Total Reducing Poverty (2 items)</i>				£141,627	
<u>Resettlement and Rehabilitation of Offenders</u>					
May 2017	14116 Vision Housing	To support our core work of providing access to good quality private sector housing for ex-offenders and providing support to maintain tenancies and reduce re-offending.	The charity is currently going through a merger and will not be the legal entity delivering this work.	£120,000	JXJ Croydon
<i>Total Resettlement and Rehabilitation of Offenders (1 item)</i>				£120,000	

Request Date	Ref & Organisation	Purpose	Reason for Recommendation for Rejection	Grants Amount Requested & Area
<u>Strengthening London's Voluntary Sector</u>				
December 2016	13848 Ahead Partnership	To fund a new volunteer project coordinator post which will recruit and support our volunteers from across London to work with young people.	The organisation is not a second tier organisation and the majority of volunteers are from the business community. Your officer feels that the project will not primarily be supporting third sector organisations.	£86,200 SAR Camden
July 2017	14181 Masorti Judaism	We seek to train three grassroots organisations in Barnet in relational leadership, enabling them to develop more effective relationships between volunteers, staff, trustees and beneficiaries.	This applicant's single objective is to advance religion. The proposed project to train three local organisations (non-Jewish) in relational leadership is outside their objective.	£16,358 SFJ Barnet
<i>Total Strengthening London's Voluntary Sector (2 items)</i>				£102,558
Grand Totals (11 items)				£1,260,479

Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Grants/expenditure considered under Delegated Authority	Public
Report of: Chief Grants Officer	For Information

Summary

This report advises members of grants approved under delegated authority since your last meeting.

Recommendation

Members are asked to:

- Receive this report and note its contents

Main Report

Following the approval of the Court of Common Council on 16th 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.

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

Holy Trinity English Classes
(Approved 1/8/2017)

£2,500 over three years (£800, £850, £850) towards the salaries of sessional ESOL tutors for the Holy Trinity English Classes.

The Integrate Agency CIC
(Approved 27/7/2017)

£4,944 for the delivery of 4 x 8hr training sessions and associated materials to 48 IT professionals, brokerage of matching expertise with requested need by charities, development of a microsite for information sharing.

London Symphony Orchestra Limited (Lord Mayor's Show) (Approved 27/7/2017)	£3,000 for costs of participating in Lord Mayor's Show 2017. <i>Agreed together with other CBT grant/non-grant spend on Lord Mayor's Show.</i>
Core Arts (Lord Mayor's Show) (Approved 27/7/2017))	£1,683 for the costs of participating in the Lord Mayor's Show 2017. <i>Agreed together with other CBT grant/non-grant spend on Lord Mayor's Show.</i>
Ballet Rambert Ltd (Lord Mayor's Show) (Approved 27/7/2017)	£750 for the costs of participating in the Lord Mayor's Show 2017. <i>Agreed together with other CBT grant/non-grant spend on Lord Mayor's Show.</i>
<u>Grants to Grenfell Summer Programme (18 grants)</u> (Approved 19/7/2017)	18 grants of < £10,000 providing activities and support over the summer, for communities affected by the Grenfell Tower disaster. (The full list was tabled at your July Committee.)
<u>Requests £10k - £25k</u>	
None	
<u>Requests £25k - £50k</u>	
Kensington & Chelsea Citizens Advice Bureau Service (Approved 9/8/2017)	£50,000 towards the salary of a Response Manager to co-ordinate pro bono relationships and workforce as well as relationships with other local providers.
Triangle Adventure Playground Association (Approved 9/8/2017)	£48,300 over three years (£16,430, £14,960, £16,910) for the salary of a sessional Environmental Play worker £14/h (15:00-18:30 four days/week during term time and 11:30-18:00 four days/week during school holidays) and related project costs. A condition of grant is that two additional trustees are added to the board within six months of the grant commencing.
Lord Mayor's Show – Non-Grant spend (Approved 27/7/2017)	£31,612 towards delivery costs of the Lord Mayor's Show 2017.

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
September 2017	£127,717	23	0	0	£129,912	3
Total for year to date	£140,467	30	£17,400	1	£160,462	4

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Committee	Dated:
City Bridge Trust	20 th September 2017
Subject: Withdrawn & Lapsed applications	Public
Report of: Chief Grants Officer	For Information

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:

Bush Hill Park Bowls Tennis & Social Club

Facilities for the disabled, including toilet facilities and an external ramp into the building. The toilet to be provided by a small extension.

- Application withdrawn as legacy left by a club member to cover cost of accessible toilet. Access audit not yet undertaken as advised.

Cardinal Hume Centre

In line with our founder's Benedictine ethos, and the universal design concept, we are seeking support to develop a welcoming building accessible to all.

- The organisation chose to withdraw their access audit application.

Equinox (Stepping Stones)

Funding for investment readiness, independent evaluation and a marketing strategy to attract core and capital funding, focusing on understanding cost base and achievement to impact.

- The organisation chose to withdraw its application.

Lewisham Citizens Advice Bureau Service

To develop a Volunteer-led service assisting clients not capable of dealing with Benefit enquiries and appeals including representation at Tribunals.

- Withdrawn - applicant to review and resubmit a more robust proposal better aligned to its current services.

Sponsors for Educational Opportunity Limited

Funding is sought for the start-up and delivery costs of SEO Advance, a work readiness programme for high-achieving Year 11-13 students from low socioeconomic backgrounds.

- The organisation withdrew the proposal in order to re-apply at a later date with a revised application.

Lapsed Applications

- None -

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Committee	Dated:
City Bridge Trust	20th September 2017
Subject: Variations to grants awarded	Public
Report of: Chief Grants Officer	For Information

Summary

This report informs Members of 2 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.

Media Trust/CBT

In September 2015 funds were agreed to commission the Media Trust to produce six case-study short films to help illustrate the Stepping Stones fund. One of the selected organisations dropped out of the programme early on meaning that there was a cost saving of £1,127 which has now been revoked.

Mayor's Fund for London

You agreed a Stepping Stones grant of £50,000 to the Mayor's Fund for London in November 2016 as they wished to develop a range of social investment facilities. The organisation reported difficulty in planning the work and subsequently advised the Trust that its Board no longer wished to undertake the project. The full amount was subsequently revoked.

Ciaran Rafferty

Principal Grants Officer

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Committee	Dated:
City Bridge Trust Committee	20 September 2017
Subject: City Bridge Trust Communications	Public
Report of: The Chief Grants Officer	For Information
Report author: 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 14/07/17 and 08/09/17 against each of the four key audiences identified in your Communications Strategy.
2. This shows good levels of activity towards all four audiences. There was particularly strong engagement with regulators and politicians, including meetings with the Head of the Number 10 Policy Unit, and the Deputy Mayor for Social Integration, Social Mobility and Community Engagement.

Media Activity

3. Appendix 2 provides a detailed breakdown of the media activity supporting delivery of your Communications Strategy during this period. Following the work of Kristina Drake, Media Officer, there continued to be high levels of coverage, particularly around your Bridge to Work programmes and the Grenfell summer grants programme which featured on Sky News, LBC Radio and in the Evening Standard.

External Events Register

4. A range of events were attended on behalf of the Trust during this period. These included a staff training session looking at the type of common access issues which organisations should consider in relation their building and services. The course was provided by the Centre for Accessible Environments, who are in receipt of a grant from yourselves to run an Access and Sustainability advice service for organisations seeking a grant on your Making London More Inclusive capital grants programme.
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"> • Barking and Dagenham Post • Bromley Times • Charity Times • Charity Today • City Matters • Disability News • Enfield Independent • Evening Standard • Financial Times • Get West London • KCW Today • LBC • London Bulletin • London Live • Mercury • Pos'Ability Magazine • Sky News • South London Press • Spirit FM • The Voice • Tottenham & Wood Green Independent • Waltham Forest Guardian 	<p>CBT Twitter:</p> <ul style="list-style-type: none"> • 4,745 followers (up by 164 since last meeting). • 116k impressions* between <p>CBT Website:</p> <ul style="list-style-type: none"> • 4,725 users • 7,104 sessions 	None to report

Audience	Face to face	Online and Printed Media channels	Online content	Direct Marketing
Regulators & politicians	<ul style="list-style-type: none"> • Argentinian Embassy • CoL Parliamentary Terrace Reception • Greater London Authority • London Councils • Number 10 Policy Unit • Office of Civil Society 	<ul style="list-style-type: none"> • Financial Times • Legal Cheek • London Loves Business • The Law Society Gazette 	Continued Twitter activity relating to the London Borough of Culture programme under the hashtag #MyLocalCulture	None to report
Immediate stakeholders**	<ul style="list-style-type: none"> • Centre for Accessible Environments training • CBT Team Away Day • Charterhouse Event • Prince's Trust Meeting 	<ul style="list-style-type: none"> • City Matters • Charity Today • Financial Times 	<ul style="list-style-type: none"> • News items on the CoL intranet and e-bulletin. • Regular updates in the Members' Briefing. 	None to report
Other funders, policy makers & key commentators	Various events including a meeting of a consortium of funders to review support for summer activities in the Grenfell area, hosted by John Lyon's Charity.	<ul style="list-style-type: none"> • Charity Today • Fundraising UK • Horticulture Week • Legal Cheek • The Law Society Gazette 	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
14th July 2017 to 5th September 2017

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
Parklife London	Horticulture Week	6,300	Report on the London Assembly's 'Park Life' report, which references the City Bridge Trust's own Parklife London website (www.parklifelondon.org.uk).	National trade	17/07/17
Moving On Up - Black Training and Enterprise Group	The Voice	30,000	A feature on the £1million 'Moving on Up Initiative', a project aimed at supporting young black men through education and employment jointly funded with Trust for London.	Regional	18/07/17
Bridge To Work – Centre for Mental Health	Bromley Times	87,000	Bromley's young people with mental health conditions are set to benefit from the £1.5million 'Bridge to Work' employment scheme run in collaboration with The Centre for Mental Health.	Regional	18/07/17
Bridge To Work	Pos'Ability Magazine	-	Continued coverage of the Trust's new 'Bridge To Work' programme, which supports young disabled Londoners into work.	Trade	18/07/17
Bridge To Work	Disability News	-	As above.	Trade	18/07/17
Bridge To Work	London Live (via YouTube)	250,000	Chairman Alison Gowman was interviewed about the 'Bridge To Work' programme.	London broadcaster	21/07/17
Grenfell summer programme	KCW Today	60,000	Coverage on grants to 18 organisations for summer activity programmes aimed at young people affected by the Grenfell fire. Chairman Alderman Alison Gowman is quoted.	Regional	24/07/17

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
Grenfell summer programme	Fundraising UK	33,000	As above.	Trade	24/07/17
Grenfell summer programme	London Bulletin	15,000	As above.	London-wide	24/07/17
Grenfell Summer programme	Get West London	660,314	As above.	London-wide	24/07/17
Grenfell Summer Programme	Evening Standard	858,504	As above.	London-wide	25/07/17
Grenfell Summer Programme	LBC (no link available)	1,283,000	Chairman Alison Gowman interviewed about the grant and activity programmes in the Grenfell area.	London-wide broadcaster	25/07/17
Grenfell Summer Programme	City Matters (internal only)	20,000	As above	London-wide	26/07/17
Bridge To Work – Centre for Mental Health	City Matters (internal only)	20,000	As above.	London-wide	26/07/17
Grenfell Summer Programme	Sky News	2,000,000	Chairman Alison Gowman was interviewed at the Westway Sports Centre for a report about summer activities for Grenfell survivors.	National	27/07/17
Grenfell Summer Programme	Charity Today	50,000	As above.	Trade	27/07/17
999 Club & Lady Florence Trust	South London Press (internal only)	22,500	Chairman Alison Gowman is quoted regarding a £123k grant for advice and support services for homeless people in Lewisham.	Regional	02/08/17

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
999 Club & Lady Florence Trust	Mercury (internal only)	43,745	As above	Regional	02/08/17
City Bridge Trust	City Matters (internal only)	20,000	Column by Policy and Resources Chairman, Catherine McGuinness which refers to the work of the Trust, and especially its role in assisting victims of the Grenfell Tower fire.	London-wide	02/08/17
999 Club & Lady Florence Trust	City Matters (internal only)	20,000	As above.	London-wide	02/08/17
Grenfell Summer Programme	Spirit FM	75,000	As above.	Regional broadcaster	11/08/17
Legal Education Foundation's Justice First Fellowship	Legal Cheek	150,000	City Bridge Trust referred to along with BBC Children in Need as funding solicitor trainee posts at Just for Kids Law, Coram Children's Legal Centre and Migrant and Refugee Children's Legal Unit.	Trade	14/08/17
Respond	City Matters (internal only)	20,000	Report on an award of over £95,000 to Respond, a charity that supports offenders with learning disabilities and autism in a bid to prevent re-offending. Chairman Alison Gowman is quoted.	London-wide	16/08/17
HMDT Music	Enfield Independent (internal only)	50,714	A front-page story about a grant for an educational music project which helps young offenders while in prison and in the process of getting their lives back on track. Chairman Alison Gowman is quoted.	Local	17/08/17

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
South London Theatre	South London Press	22,500	The Trust is listed as having funded the refurbishment of a Grade II listed former fire station used by the South London Theatre group.	Regional	18/08/17
Carney's Community	South London Press	22,500	Report on a grant of just over £69,000 towards a new programme to help change the lives of vulnerable young people through boxing and mentoring.	Regional	18/08/17
Carney's Community	Charity Today	50,000	As above	Trade	18/08/17
HMDT Music	Tottenham & Wood Green Independent (internal only)	18,154	As above	Regional	21/08/17
Hackney Community Law Centre	The Law Society Gazette	397,245	The Trust's grant of £160,000 towards legal trainee posts at North Kensington Law Centre, Hackney Community Law Centre, and the Legal Advice Centre (University House), are reported.	Trade	22/08/17
Carney's Community	Charity Today	50,000	As above.	Trade	24/08/17
Age UK	Evening Standard (internal only)	858,504	Report on a joint initiative between Action Fraud and Age UK, funded Trust, to safeguard elderly Londoners from financial fraud and cyber crime.	London-wide	29/08/17
Age UK	Financial Times	-	As above.	National	30/08/17

Organisation	Publication & Weblink	Readership	Detail	Coverage	Date
City Bridge Trust	Charity Times	30,000	A report on the latest rounds of grants in which over £2million was awarded to 20 charitable organisations across London.	Trade	30/08/17
Age UK	London Loves Business	115,000	As above.	London-wide	30/08/17
Participatory City	Barking and Dagenham Post	5,157	Report on this initiative in LB of Barking & Dagenham which the trust is jointly funding along with Esmée Fairbairn Foundation and Big Lottery Fund.	Regional	30/08/17
Carney's Community	City Matters (internal only)	20,000	As above.	London-wide	31/08/17
Bridge To Work – Centre for Mental Health	Personnel Today	-	As above.	Trade	31/08/17
Age UK	Charity Today	50,000	As above.	Trade	01/09/17
Stay Safe East	Waltham Forest Guardian	12,900	Report on a grant of £103,700 towards supporting disabled and deaf victims of violence.	Regional	05/09/17
Plan Zheroes	Charity Today	50,000	Report on the Trust's grant of £108,400 to expand their work redistributing unwanted food to charities.	Trade	07/09/17
HMDT Music	Islington Gazette (internal only)	5,722	As above.	Regional	07/09/17

**Appendix 3: External Events Attended
14th July 2017 to 5th September 2017**

Date	Host Organisation	Type of Event	City of London's Representative	Location/Borough	Summary
18/07/17	London Councils	Presentation	David Farnsworth, Jenny Field, Chairman Alison Gowman	Southwark	To provide an introduction to The Way Ahead and Cornerstone Fund to London Councils.
18/07/17	City of London	City of London Parliamentary Terrace Reception	David Farnsworth	Westminster	The City of London Parliamentary Reception provides an opportunity at the start of a new Parliament for City businesses to meet Ministers and members of both Houses of Parliament on an informal basis.
18/07/17	Trust for London	Reception	Ciaran Rafferty, Principal Grants Officer; Sandra Davidson, Grants Officer	Hamilton House, Bloomsbury	An end-of-project seminar/reception for the Moving on Up project which the Trust co-funded.
20/07/17	City Bridge Trust	Team Away Day	CBT staff	Tower Bridge	Strategic planning day regarding the implementation of the 2018-23 Funding Strategy. A session was also held with colleagues from the Tower Bridge team.
24/07/17	Columbian Embassy	Meeting	David Farnsworth	Westminster	Meeting with Nestor Osorio, Colombian Ambassador.

Date	Host Organisation	Type of Event	City of London's Representative	Location/Borough	Summary
24/07/17	Prince's Trust	Meeting	Chairman Alison Gowman, David Farnsworth & Shegufta Rahman, Grants Officer	Guildhall	Strategic group meeting
24/07/17	City Bridge Trust & Trust for London	Screening	Chairman Alison Gowman, David Farnsworth & other CBT staff	The Charterhouse	See CGOs report for full details
26/07/17	Weil, Gotshal & Manges LLP	Seminar	Tim Wilson, Principal Grants and Social Investment Officer	City	A seminar of social investors and charitable foundations looking at the work they might do to develop the charity sector through the combined use of repayable and grant finance.
26/07/17	London Funders	Event	Chairman Alison Gowman, David Farnsworth, Jenny Field	Senator House, Queen Victoria Street	Farewell event for David Warner Director of London Funders.
01/08/17	Greater London Authority	Meeting	David Farnsworth	Southwark	Meeting with Matthew Ryder, Deputy Mayor for Social Integration, Social Mobility and Community Engagement
03/08/17	Centre for Accessible Environments	Training	Various CBT staff	Guildhall	Disability access training, also attended by staff from the Remembrancers events team.

Date	Host Organisation	Type of Event	City of London's Representative	Location/Borough	Summary
04/08/17	Rehabilitation of Addicted Prisoners Trust	Chief Officer learning visit	David Farnsworth, Deputy Chairman Dhruv Patel	Camden	Chief Officer grantee visit.
09/08/17	Social Investment Business	Seminar	Tim Wilson, Principal Grants and Social Investment Officer	Southwark	A discussion between City Bridge Trust, Trust for London, Social Investment Business and CAN Invest to look at the development of a London Impact Fund offering lower cost credit to charities in London.
09/08/17	Metro Centre	Learning visit	Ciaran Rafferty, Principal Grants Officer	Greenwich	An informative visit to a grantee
10/08/17	City Bridge Trust	Rounders match	Most CBT staff	Regents Park	An annual social event with several other funders including: BBC Children in Need, John Lyon's Charity, Trust for London, Paul Hamlyn Foundation
15/08/17	Buttle UK	Meeting	Ciaran Rafferty, Principal Grants Officer; Shegufta Rahman, Grants Officer	Victoria	A catch-up meeting to discuss your partnership programme with Buttle UK and to plan a future learning conference.

Date	Host Organisation	Type of Event	City of London's Representative	Location/Borough	Summary
21/08/17	Number 10 Policy Unit	Meeting	David Farnsworth	Westminster	David Farnsworth joined Catherine McGuinness Policy Chairman and Damian Nussbaum to meet with James Marshall (Head of Policy at Number 10).
29/08/17	Office of Civil Society	Round table	David Farnsworth	Westminster	Meeting with OCS & other government officials to inform design of the government's Shared Prosperity Fund, which will be the successor to ESF funding.
04/09/17	John Lyon's Charity	Meeting	Ciaran Rafferty, Principal Grants Officer	Sloane Square	A meeting of a consortium of funders to review our support for summer activities in the Grenfell area.

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