



## Education Charity Sub (Education Board) Committee

**Date:** MONDAY, 12 DECEMBER 2016  
**Time:** 2.30 pm  
**Venue:** COMMITTEE ROOMS, WEST WING, GUILDHALL

**Members:** Deputy Catherine McGuinness (Chairman)  
Henry Colthurst (Deputy Chairman)  
Randall Anderson  
Deputy John Bennett  
John Fletcher  
Deputy Bill Fraser  
Ann Holmes  
Philip Woodhouse

**Enquiries:** Philippa Sewell  
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**NB: Part of this meeting could be the subject of audio or video recording**

**John Barradell  
Town Clerk and Chief Executive**

## **AGENDA**

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **TERMS OF REFERENCE AND FREQUENCY OF MEETINGS**  
To note the Sub-Committee's Terms of Reference and agree the frequency of meetings.  

**For Decision**  
(Pages 1 - 2)
4. **CENTRAL GRANTS**  
Verbal update of the Senior Grants Officer.  

**For Information**
5. **GRANT RECOMMENDATION REPORT - CITY EDUCATIONAL TRUST FUND, COMBINED EDUCATION CHARITY**  
Report of the Chief Grants Officer.  

**For Decision**  
(Pages 3 - 42)
6. **DEVELOPMENT OF POLICY TO GUIDE APPLICATION OF CHARITABLE FUNDS - CITY EDUCATIONAL TRUST FUND, COMBINED EDUCATION CHARITY**  
Report of the Chief Grants Officer.  

**For Decision**  
(Pages 43 - 80)
7. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE SUB-COMMITTEE**
8. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT**

## **Education Charity Sub (Education Board) Committee Terms of Reference**

### **Constitution**

- Chairman and Deputy Chairman of the Education Board, and two further Members of the Education Board.
- Four Members appointed by the Community and Children's Services Committee.

### **Quorum**

- Any three Members, provided at least one Member from both the Education Board and the Community and Children's Services Committee is present.

### **Terms of Reference**

- To be responsible for the application of funds from the City of London Combined Education Charity (registered charity no. 312836) and the City Educational Trust Fund (registered charity no. 290840), in line with any policy set by the Education Board governing the management of those charities.
- To review the eligibility criteria of those charities ahead of the 2017/18 funding cycle and make any recommendations on proposed amendments to the Education Board.
- To make recommendations to the Education Board on any policy governing the management of the City of London Combined Education Charity (registered charity no. 312836) and the City Educational Trust Fund (registered charity no. 290840).

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|---|---|
| <b>Committee</b><br>Education Charity Sub-Committee   | <b>Dated:</b><br>12 <sup>th</sup> December 2016 |
| <b>Subject</b><br>Grant Recommendation Report – City Educational Trust Fund, Combined Education Charity | <b>Public</b>                                   |
| <b>Report of:</b><br>Chief Grants Officer   | <b>For Decision</b>                             |
| <b>Report author:</b><br>Jack Joslin, Central Grants Programme  |   |

## Summary

The 'Education and Employment' funding theme, which forms part of the Central Grants Programme (CGP) opened to applications on 15<sup>th</sup> August 2016.

The two charities providing funding through this theme are the City of London Corporation City Educational Trust Fund (290840) and the City of London Corporation Combined Education charity (312836).

The first closing date for the 'Education and Employment' theme grant applications under the Central Grants Programme was on the 15<sup>th</sup> November 2016. These applications have been assessed and this report recommends grant decisions for both charities.

## Recommendations

- To note the Central Grants Programme assessment process, eligibility criteria and budget.
- To review and approve the recommendations for applications received under the The City Educational Trust Fund and Combined Education Charity.

## Main Report

### Background

1. On 19 May 2016, the Policy and Resources Committee agreed that the Education Board be appointed as the Grand Committee responsible for the Combined Education Charity and City Educational Trust Fund.
2. At the July 2016 Education Board Members agreed that the existing eligibility criteria for the Combined Education Charity and City Educational Trust Fund would remain in place until March 2017. The Education Board also agreed that Education Charity Sub-Committee review the funding criteria to ensure alignment with the Education Strategy and implement any required amendments before the 2017/2018 funding cycle.

3. The current eligibility criteria for both charities are provided as Appendix 1.

### **Central Grants Assessment Process**

4. The Central Grants Unit (CGU) grant assessment process draws on City Bridge Trust's expertise in the field of grant-making and demonstrates good practice.
5. Prior to grant applications being submitted to this Sub-Committee for approval, each individual application has undergone a series of due diligence checks by the CGU to ensure compliance with the established eligibility criteria. A copy of the standard checklist for both charities is provided as Appendix 2.
6. Recommendations are made to this Sub-Committee based on applicants demonstrating how they align with the established criteria, whether they have provided the required evidence to support their application, and had their financial assessment approved by the Head of Charity and Social Investment Finance in the Chamberlain's Department.
7. All individual applicants to the Combined Education Charity were requested to provide information regarding their personal circumstances. From the information disclosed judgements on the applicants' eligibility were made in line with the Joseph Rowntree Minimum Income Standards.<sup>1</sup>
8. The deadline for applications received under the 'Education and Employment' theme of the CGP was 15<sup>th</sup> November 2016 and all assessments conducted over the 2 week period following the closing date by the Senior Grants Officer overseeing the CGP.

### **Combined Education Charity**

9. The Combined Education Charity received a total of 14 applications. 1 application has been received from a school and 13 applications from individuals. An overview of all applications recommended for approval, rejection or which were withdrawn is provided as Appendix 3.
10. The Combined Education Charity received applications totalling £38,740. The current funds available for dispensing for the Combined Education Charity are £28,600. Taking into account the maximum 12%<sup>2</sup> (£3,432) management fee it is recommended that this Sub-Committee allocate no more than £25,168 in this round.

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<sup>1</sup> The Minimum Income Standard for the UK shows how much money people need, so that they can buy things that members of the public think that everyone in the UK should be able to afford.

<sup>2</sup> Once the full extent of time spent by the Central Grants Unit is known, should the fee be less than the 12% stated, both the Combined Education Charity and City Education Trust Fund will be reimbursed, and the funds made available for the 2017/2018 funding cycle.

11. Following an assessment of all the applications received, 9 applications have been recommended for approval totalling £25,000.

### **City Educational Trust Fund**

12. The City Educational Trust Fund received a total of 5 applications for funding. The Senior Grants Officer assessment report for the recommended rejected and withdrawn applications are provided at Appendix 4.

13. The City Educational Trust Fund received applications totalling £114,500. The current funds available for dispensing for the City Educational Trust are £93,241. Taking into account the maximum 12%<sup>3</sup> (£11,188) management fee it is recommended that this Sub-Committee allocate no more than £82,053 in this round.

14. Following assessment by the Senior Grants Officer, it is recommended that this Sub-Committee approve 3 funding applications totalling £19,500.

### **Appendices**

Appendix 1: Eligibility Criteria – The Combined Education Charity and The City Educational Trust Fund.

Appendix 2: Due Diligence Checklist for Combined Education Charity and City Educational Trust

Appendix 3: Combined Education Charity – Grant Recommendations

Appendix 4: The City Educational Trust Fund – Grant Recommendations

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<sup>3</sup> Once the full extent of time spent by the Central Grants Unit is known, should the fee be less than the 12% stated, both the Combined Education Charity and City Education Trust Fund will be reimbursed, and the funds made available for the 2017/2018 funding cycle.

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# The City of London Corporation Combined Education Charity (312836)

## Grants Policy and Funding Eligibility Criteria

### *The Purposes of the Charity:*

The purposes of the charity are to benefit the public by:

(a) Furthering the education of persons attending or proposing to attend secondary, further or higher educational institutions through grants or financial assistance, and by arranging or supporting education and training to extend or complement courses provided by such institutions; and

(b) Providing grants to staff of maintained schools and Academies in the City of London and the London boroughs to undertake study which furthers their development as teachers.

### *Grants Policy and Eligibility for Funding*

In order to target the Charity's limited funds to most effectively and efficiently achieve the charity's broad purposes to further education, as noted above, the following grants policy and criteria have been adopted when considering all current applications for funding.

#### *Persons Eligible for Funding*

1. Persons who are of secondary school age or above, either –

(a) attending a further or higher educational institution in the City of London or one of the London boroughs; OR

(b) attending one of the Academies sponsored by the City of London Corporation, The City of London School or The City of London School for Girls; OR

2. A current member of staff at one of the City of London Sponsored Academies, The City of London School or the City of London School for Girls.

Applications under 1(b) may be made on behalf of an individual pupil or on behalf a group of pupils attending the relevant school. Where an application is submitted on behalf of more than one pupil the school must identify the individual pupils who are intended to benefit from the grant and provide sufficient information to support the application being made on behalf of each of them.

This must include evidence of financial need and details of the educational merit and value which would be achieved for those individual pupils should the grant be awarded.

Individuals who are awarded a grant from the Charity will not be eligible for further funding within **5 (five) years** of the decision to award the grant. Organisations applying on behalf of groups are not subject to this restriction.



### *Activities which will be funded*

**For Students**, these include:

- (a) Course fees.
- (b) Equipment and or resources necessary to undertake a course of study e.g. specialist recording equipment, specialist technical equipment, purchase of books and reference materials.
- (c) Travel and associated expenses directly relevant to the course of study or education.
- (d) Expenses associated excursions and travel organised by the school.
- (e) Activities associated with the individual's education (or expense related directly thereto) where the educational merit or value of that activity has been demonstrated in the application.

**For Teachers** these include courses and study for the purposes of professional development as a teacher.

Those who benefit from a grant will be required to provide a written update to the Charity of the outcomes and benefits experienced by those individuals in undertaking the course or activity funded by the grant.

### *Maximum Grant*

The maximum funding which will be awarded to an individual is: **£3,000**.

Where an application for funding is submitted on behalf of more than one person, the grant may exceed this amount but will not exceed £3,000 per individual.

## **1. How do you apply for a grant?**

To apply for a City of London Corporation ("CoLC") grant you will need to complete an online application form by the corresponding deadline and submit this electronically with your supporting documents to the Central Grants Unit.

You should send your application to us well before the stated deadline to allow us to process your application in time. We will only consider one application from you or your organisation at any one time.

All application forms should be completed through the online CoLC Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

## **2. How are applications assessed?**

Once the CoLC has received your online application and all supporting documents it will be passed to one of the Grant Officers for assessment. As part of this process a Grants Officer may contact you for more information.

We will acknowledge receipt of your application within 10 working days of it being received. If your application is not complete it will be returned to you and you will have a further 10 working days to send us the missing information.



Once a full assessment of your application has been completed your request will be referred to the decision-making Committee.

The timescale to process your application will vary; however, we will endeavour to ensure your application is assessed within 12 weeks of the closing date.

### **3. How do we monitor and evaluate grant recipients once an award has been made?**

If we award a grant to you, you will be requested to complete an end of grant monitoring report to confirm how the grant has been spent and what you achieved. Please make sure that you keep receipts for all the items or services you buy with the grant and that you keep them somewhere safe as we may ask you to provide them.

Please keep us up to date if any of your contact details change at any stage during the period of your grant.

### **4. If your grant application is successful**

If your application is successful, an initial offer letter detailing the level of grant awarded will be issued. This may contain special conditions relating to the grant award or pre-agreement grant conditions.

Grant acceptance terms and conditions will be subsequently issued which should be signed and returned within 20 working days.

Once all documentation has been received and approved you would be asked to formally request payment of your grant award.

### **5. If your grant application is unsuccessful**

Unfortunately, due to the limited budget available and the number of applications for funding we receive, the CoLC cannot provide funding to every applicant that applies for a grant. Grants are therefore awarded on a discretionary basis, there is no appeal process and the decision of the CoLC is final.

### **6. Support with your application**

We urge all applicants that are unsure about whether to submit an application to read all available eligibility criteria on our website and attend one of our Grant Officer led workshops; dates for which will be publicised on our website throughout the year.

If you have an enquiry that is not covered within the online guidance, please contact the Grants Unit directly, who will be able provide answers to general queries regarding the application process.

### **7. Can you reapply for funding?**

Individuals who are awarded a grant from the Charity will not be eligible for further funding within **5 (five) years** of the decision to award the grant. Organisations applying on behalf of groups are not subject to this restriction.



# The City of London Corporation City Educational Trust Fund (290840)

## Charitable Purposes

The purposes of this charity are – for the advancement of education for the public benefit by:

1. The advancement of the objects of The City University or for other educational purposes connected with or related to the University; OR
2. The advancement of: -
  - (i) education in science and technology, business management and commerce by the promotion of research, study, teaching and training in any of them; or
  - (ii) the study and teaching of biology and ecology; or
  - (iii) research, study and teaching in the cultural arts.

## Guidelines

The following guidelines will be observed when assessing applications:

- (a) Grants will be given to organisations rather than individuals;
- (b) Under the second object, assistance will be given to organisations having education as an objective or which seek to sponsor the pursuit of further and higher education;
- (c) The applicant must demonstrate **either**:
  - a sufficiently strong connection with the City of London; for example, that the applicant's beneficiaries are City residents or workers; **or that**
  - the funding will support charitable activity having special nationwide significance or impact.
- (d) Preference will be given to applications for grants to actively further the organisation's objects through its activities, rather than for core costs such as employee salaries etc.; and
- (e) It is unlikely that grants would be made to organisations –
  - already in receipt of financial support through the London Councils' London-wide Grants Scheme and/or the local grants to voluntary organisations scheme,
  - which have historically received a large proportion of their funding from central government or other local government sources, and
  - that have received a grant for similar activities from the City Bridge Trust, the grant-giving arm of the City of London Corporation's charity, Bridge House Estates [1035628] .

NB: The above are 'guidelines' only and the CoLC retains total discretion as to whether an



application falling outside the guidelines but within the charity's objects is supported.

## **Application Procedures**

### **8. How do you apply for a grant?**

To apply for a City of London Corporation ("CoLC") grant you will need to complete an online application form by the corresponding deadline and submit this electronically with your supporting documents to the CoLC Central Grants Unit.

You should send your application to us well before the stated deadline to allow us to process your application in time. We will only consider one application from your organisation at any one time.

All application forms should be completed through the online CoLC Central Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

### **9. How are applications assessed?**

Once the CoLC has received your online application and all supporting documents it will be passed to one of the Grant Officers for assessment. As part of this process a Grants Officer may contact you for more information.

We will acknowledge receipt of your application within 10 working days of it being received. If your application is not complete it will be returned to you and you will have a further 10 working days to send us the missing information.

A Grants Officer may also arrange to visit you or your organisation as part of the assessment process. Once a full assessment has been completed your request will be referred to the decision-making Committee.

The timescale to process your application will vary; however, we will endeavour to assess your application within 12 weeks of the closing date. You should take account of this when planning your project.

### **10. How do we monitor and evaluate grant recipients once an award has been made?**

If we award a grant to your organisation we will need you to complete an 'end of grant' monitoring report to confirm how the grant has been spent and what you achieved. Please make sure that you keep receipts for all the items or services you buy with the grant and that you keep them somewhere safe as we may ask you to provide them.

We may also visit you to check how the grant has been spent.

Please keep us up to date if your project or any of your contact details change at any stage during the period of your grant.



### **11. If your grant application is successful**

If your application is successful, an initial offer letter detailing the level of grant awarded will be issued. This may contain special conditions relating to the grant award or pre-agreement grant conditions.

Grant acceptance terms and conditions will be subsequently issued which should be signed and returned within 20 working days.

Once all documentation has been received and approved you would be asked to formally request payment of your grant award.

### **12. If your grant application is unsuccessful**

Unfortunately, due to the limited budget available and the number of applications for funding we receive, the CoLC cannot provide funding to every applicant that applies for a grant. Grants are therefore awarded on a discretionary basis, there is no appeal process and the decision of the CoLC is final.

### **13. Support with your application**

We urge all applicants that are unsure about whether to submit an application to read all available eligibility criteria on our website and attend one of our Grant Officer led workshops; dates for which will be publicised on our website throughout the year.

If you have an enquiry that is not covered within the online guidance, please contact the Grants Unit directly, who will be able provide answers to general queries regarding the application process.

### **14. Can you reapply for funding?**

New applications will not normally be considered from a recipient of a grant within a three year period.



**G.O Application Assessment Checklist**

|                           |  |
|---------------------------|--|
| <b>Organisation Name:</b> |  |
| <b>Ref Number:</b>        |  |
| <b>Request Date:</b>      |  |
| <b>Staff:</b>             |  |

| <b>Application received under which funding theme?</b> |          |
|--|----------|
| • Inspiring London through Culture                     | Yes / No |
| • Stronger Communities                                 | Yes / No |
| • Enjoying Green Space's and the Natural Environment   | Yes / No |
| • City Educational Trust Fund                          | Yes / No |

| <b>Eligibility criteria check</b>  |          |
|--|----------|
| • Does the application received satisfy the eligibility criteria in place? | Yes / No |

| <b>Section 1: Organisation Details</b>  |  |                          |
|---|--|--------------------------|
| • Have all necessary contact details been provided by the applicant organisation?                     |  | Yes / No                 |
| • Is the legal status of the organisation applying one of the below?<br>Tick as appropriate:          |  | Yes / No                 |
| a.  | Registered charity   | <input type="checkbox"/> |
| b.  | Registered Community Interest Company  | <input type="checkbox"/> |
| c.  | Registered Charitable Incorporated Organisation  | <input type="checkbox"/> |
| d.  | Charitable company (incorporated as a not-for-profit)                                    | <input type="checkbox"/> |
| e.  | Exempt or excepted charity   | <input type="checkbox"/> |
| f.  | Registered charitable industrial and provident society or charitable Cooperative (Becom) | <input type="checkbox"/> |
| g.  | Constituted voluntary organisation   | <input type="checkbox"/> |
| h.  | Educational establishment  | <input type="checkbox"/> |
| • Has the organisation appended a valid constitution or articles of association to their application? |  | Yes / No                 |
| • Is this applicant's proposal within its objects/articles?   |  | Yes / No                 |

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| <ul style="list-style-type: none"><li>Is there an appropriate number of board/management committee Members/Trustees?</li></ul>                                     | Yes / No   |
| <b>Section 2: Grant Requested</b>  |  |
| <ul style="list-style-type: none"><li>Is the total amount of grant requested aligned with the minimum/maximum amount permitted under this funding theme?</li></ul> | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Will the corresponding Committee/Officer panel meet before the date identified when the funding is required?</li></ul>       | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Does the applicant demonstrate that they have satisfied the eligibility criteria in a clear and transparent way?</li></ul>   | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Does the applicant organisation plan to deliver their project or service within the agreed geographical boundary?</li></ul>  | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Has the applicant received funding through the CoLC before?</li></ul>  | Yes / No<br>If yes, provide details in the recommendations/additional comments section |
| <b>Section 3: Impact and Outcomes</b>  |  |
| <ul style="list-style-type: none"><li>Is the number of project beneficiaries proportionate to the level of grant awarded?</li></ul>                                | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Is the time scale to deliver the proposed project feasible?</li></ul>  | Yes / No<br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>Are the project outputs/outcomes sufficiently impactful and proportionate to the level of award requested?</li></ul>         | Yes / No<br>If no, provide details in the recommendations/additional comments section  |



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| <ul style="list-style-type: none"><li>• If working with children or vulnerable adults, has a safeguarding policy been provided?</li></ul>   | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• Bearing in mind the nature of the project proposed and the geographical area it is to be delivered in, does it target a wide enough range of ethnic minorities, age groups and disabled people?</li></ul> | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <b>Section 4: Financial Information</b>   |  |
| <ul style="list-style-type: none"><li>• If another funding application has been submitted to a different funding organisation to deliver this specific activity, is there a likelihood of a double funding situation arising?</li></ul>           | Yes / No<br><br>If yes, provide details in the recommendations/additional comments section |
| <ul style="list-style-type: none"><li>• If match funding is required for this application, is this in place? Or will it be approved by the time this application is submitted to the officer panel/committee?</li></ul>                           | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• Does the funding breakdown provided identify all expenditure items and is it transparent?</li></ul>   | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• Can the project or service still be delivered if part funding is approved?</li></ul>  | Yes / No<br><br>If yes, provide details in the recommendations/additional comments section |
| <b>Section 5: Additional information</b>  |  |
| <ul style="list-style-type: none"><li>• Have all the necessary documents to support the application been appended to the application?</li></ul>   | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• If additional evidence of need has been provided, does this need to be highlighted to the officer panel/Committee?</li></ul>  | Yes / No<br><br>If yes, provide details in the recommendations/additional comments section |
| <b>Section 6: Referee</b>   |  |
| <ul style="list-style-type: none"><li>• Is the referee independent of the applicant organisation?</li></ul>   | Yes / No<br><br>If no, provide details in the recommendations/additional                   |

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|   | comments section   |
| <ul style="list-style-type: none"><li>• Do the referee fully support the application?</li></ul> | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• Has it been necessary to contact the Referee?</li></ul> | Yes / No<br><br>If yes, provide details in the recommendations/additional comments section |

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| Recommendations/Additional Comments Grants Officer | Date of comment |
|--|-----------------|
|  |                 |
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|  |                 |
|  |                 |
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Do you approve this application to be submitted to the respective committee/Officer panel for evaluation: Yes / No

Signed:

Date:

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|                           |  |
|---------------------------|--|
| <b>Organisation Name:</b> |  |
| <b>Ref Number:</b>        |  |
| <b>Request Date:</b>      |  |
| <b>Staff:</b>             |  |

|  |          |
|--|----------|
| <b>Confirm the application form has been received under the below funding theme.</b> |          |
| <ul style="list-style-type: none"> <li>Combined Education Charity</li> </ul>         | Yes / No |

|   |          |
|---|----------|
| <b>Which specific funding stream is being applied for?</b>  |          |
| 1. A person attending a further education or higher education institution   | Yes / No |
| 2. A pupil or group of pupils attending one of the City of London sponsored academies, the City of London School or the City of London School for Girls | Yes / No |
| 3. A current member of staff at one of the City of London sponsored Academies, the City of London School or the City of London School for Girls         | Yes / No |

|   |          |
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| <b>Eligibility criteria check</b>   |          |
| <ul style="list-style-type: none"> <li>Does the application satisfy the eligibility criteria in place?</li> </ul> | Yes / No |

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| <b>Section 1: Applicant details and Grants purpose</b>   |   |
| <ul style="list-style-type: none"> <li>Have all necessary contact details been provided by the applicant/school?</li> </ul>  | Yes / No  |
| <ul style="list-style-type: none"> <li>Has the applicant provided a valid purpose for which the grant will be used (which aligns with the eligibility criteria)?</li> </ul>                      | Yes / No<br>If no, provide details in the recommendations/additional comments section |
| <ul style="list-style-type: none"> <li>Will the course or training to be undertaken provide tangible educational merit/value to the applicant/s?</li> </ul>                                      | Yes / No<br>If no, provide details in the recommendations/additional comments section |
| <ul style="list-style-type: none"> <li>Is the total amount of grant requested aligned with the minimum/maximum amount permitted under this funding theme? i.e. £3,000 per individual.</li> </ul> | Yes / No<br>If no, provide details in the recommendations/additional comments section |
| <ul style="list-style-type: none"> <li>Has a detailed breakdown of how the funding will be utilised, been provided by the applicant?</li> </ul>  | Yes / No<br>If no, provide details in the recommendations/additional comments section |

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|  |   |
| <b>Section 2: Further or Higher Education Institution and Course of Study</b>  |   |
| <ul style="list-style-type: none"> <li>Have all the details relating to the educational establishment and course been provided?</li> </ul>   | <p>Yes / No</p> <p>If no, provide details in the recommendations/additional comments section</p>        |
| <ul style="list-style-type: none"> <li>Has evidence of enrolment been attached to the application?</li> </ul>  | <p>Yes / No / N.A</p> <p>If no, provide details in the recommendations/additional comments section</p>  |
| <ul style="list-style-type: none"> <li>Have the full contact details for the course tutor been provided?</li> </ul>  | <p>Yes / No / N.A</p> <p>If no, provide details in the recommendations/additional comments section</p>  |
| <b>Section 4: Professional &amp; Academic Achievements</b>   |   |
| <ul style="list-style-type: none"> <li>Have all the necessary details on the applicant's qualifications been provided?</li> </ul> <p>Note: If there are any inconsistencies, please highlight these in the recommendations section and clarify with the applicant.</p>       | <p>Yes / No / N.A</p> <p>If yes, provide details in the recommendations/additional comments section</p> |
| <b>Section 4: Evidence of Need</b>   |   |
| <ul style="list-style-type: none"> <li>If the applicant/s are already in receipt of additional financial support (and have additional applications in the pipeline) would you assess their level of need high enough to warrant funding to be considered by CoLC.</li> </ul> | <p>Yes / No</p> <p>If no, provide details in the recommendations/additional comments section</p>        |
| <ul style="list-style-type: none"> <li>If additional evidence of need has been provided, does this need to be highlighted to the officer panel/Committee?</li> </ul>   | <p>Yes / No</p> <p>If yes, provide details in the recommendations/additional comments section</p>       |
| <b>Section 5: Previous Funding &amp; Declaration</b>   |   |

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| <ul style="list-style-type: none"><li>• Have any previous applications been made to CoLC for funding and if so, are you aware of any issues that should be brought to the attention of the committee/assessment panel?</li></ul> | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |
| <ul style="list-style-type: none"><li>• If additional evidence of need has been provided, does this need to be highlighted to the officer panel/Committee?</li></ul>   | Yes / No<br><br>If yes, provide details in the recommendations/additional comments section |
| <b>Attachments</b>   |  |
| <ul style="list-style-type: none"><li>• Have all the necessary attachments relating to this application been provided?</li></ul>   | Yes / No<br><br>If no, provide details in the recommendations/additional comments section  |

Do you approve this application to be submitted to the respective committee/Officer panel for evaluation: Yes / No

Signed:

Date:

/Cont...

| Recommendations/Additional Comments Grants Officer | Date of comment |
|--|-----------------|
|  |                 |
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### Appendix 3

| Combined Education Charity                      |                           |                       |                |                    |  |
|---|---------------------------|-----------------------|----------------|--------------------|--|
| Applications from Schools Recommended for Grant |                           |                       |                |                    |  |
|   | Organisation Name         | Status                | Request Amount | Recommended Amount | Project Description  |
| Applicant A                                     | The City Academy, Hackney | Recommended for Grant | 3000.00        | 3000.00            | Funding is sought to provide musical opportunities through close partnership with the Guildhall School of Music and other professional musicians to 29 pupils at the City Academy Hackney. £3,000 in total is sought to provide workshops, instrumental lessons, trips to concerts and travel for 29 students attending the academy. During assessment your officer was provided with a list of the students all of which were classified as Pupil Premium with at least half requiring free school meals. Funding is recommended to support this programme allowing for students at a City sponsored Academy to have access to music lessons and experiences and to become Music Ambassadors. |

Applications from Individuals Recommended for Grant

|             |                      |                       |         |         |  |
|-------------|----------------------|-----------------------|---------|---------|--|
| Applicant B | Royal College of Art | Recommended for Grant | 3000.00 | 3000.00 | <p>The applicant is seeking your support to help them with the expenses related to the last 6 months of their Menswear Fashion MA at the Royal College of Art. The applicant is seeking funding for Travel, Course Materials and course related excursions and is seeking funding of £3,000 to cover the final period of study of a 2 year course. The applicant is currently in receipt of Postgraduate Support of £5,000 annually and a College Bursary of £3,000 which goes towards covering the annual course fee of £9,500. Taking the £1,500 that is paid by the applicant into consideration they are currently living just below the Joseph Rowntree basic standard of Living. In the final 6 months of their study they wish to reduce the hours they work to focus on their study. Your funding will allow them to focus on their study at this crucial time while allowing them to have a basic standard of living.</p> |
|-------------|----------------------|-----------------------|---------|---------|--|

|             |  |                          |         |         |   |
|-------------|--|--------------------------|---------|---------|---|
| Applicant C | University of the Arts<br>London: Central<br>Saint Martins | Recommended<br>for Grant | 3000.00 | 3000.00 | The applicant is currently studying an MA in Character Animation at Central St Martins. They have 6 months remaining of a 2 year full-time course. The applicant currently lives at home with their parents. The applicant is an adult and is therefore not dependent on their parents, however during assessment it was deemed that the family income would be considered below the minimum income level if the applicants parents were to be supporting them. University of the Arts London have deemed the applicant eligible for a bursary for 50% of the course fees and evidence was provided by the applicant to demonstrate this. As the applicant is entering there final 6 months of the course this funding will be invaluable at this time to ensure they can fully focus on their studies. Funding is recommended to make up the shortfall in the course fees and to provide support for the applicant to travel to and from university and buy relevant equipment for the course. |
| Applicant D | Goldsmiths, Univ. of<br>London                             | Recommended<br>for Grant | 3000.00 | 3000.00 | The applicant is currently studying a PHD at Goldsmiths University in Community & Youth Work. On advice from their tutor they have taken on an MSC in Data Science in conjunction with their PHD to develop their research skills. The applicant has received a discount on this course from the university and has to make up the £6,489 course fees on top of contributions to PHD Payments. The applicant lives in London and works for Goldsmiths University. Their annual income while studying is £11,832 which is well below the £17,311 minimum income standard, especially when taking into account the additional course fees that will still need to be covered. I recommend that committee support the applicant with a £3,000 contribution towards the course fees for their MSC in Data Science. They have demonstrated during assessment how this will add great educational value to their academic study.  |

|             |   |                       |         |         |  |
|-------------|---|-----------------------|---------|---------|--|
| Applicant E | Institute for arts in therapy and education | Recommend for Grant   | 3000.00 | 3000.00 | This course will enable the applicant to become a fully registered Psychotherapist. The applicant is looking for funding to make up some of the course fees and to purchase audio books to assist with their study. The applicant has had a recent diagnosis of Lupus SLE and Fibromyalgia and lives at home with two dependant Children. They currently receive housing benefit and tax credits to supplement a small income of £400 a month which is well below the minimum income standard set out by Joseph Rowntree which is set at £633 a month. The annual fees for the course are £7699 and the applicant is seeking support of £2,500 towards the fees and a £500 contribution towards audio books that will assist with their studies.   |
| Applicant F | Guildhall School of Music and Drama         | Recommended for Grant | 3000.00 | 3000.00 | The applicant graduated from the Guildhall School of Music & Drama in 2016 with a first class honours degree, they have now intend to return to the school to complete their postgraduate studies on the trombone. Since the application was submitted to the Combined Education Charity the applicant has changed their course from Part-time to Full-time. They currently live at home but are over the age of 18 and not dependent on their parents. They earn approximately £2,000 an annum from occasional freelance work as a musician to complement their study. They receive a scholarship of £6,120 from the Guildhall School of Music but since converting their course these fees have risen to £9,120 leaving them with a £3,000 shortfall for the summer term. Funding is recommended to fund this shortfall in their fees to allow them to concentrate full-time on their postgraduate education on the Trombone. Funding should be awarded for their fees associated to their study at the Guildhall School of Music and Drama. |

|             |   |                       |         |         |  |
|-------------|---|-----------------------|---------|---------|--|
| Applicant G | Institute for arts in therapy and education | Recommended for Grant | 3000.00 | 3000.00 | The applicant is looking for support to fund part of their fees, therapy costs and travel for a Postgraduate Certificate in Counselling Using the Arts at the Institute in Arts in Therapy and Education. The applicant lives with their partner who receives incapacity benefit and is unable to work. The applicant work part-time and will be reducing their hours in order to concentrate on their study. Taking the applicants personal situation into account it is clear that they are eligible for funding and have supplied sufficient evidence to support this. Funding is recommended to support the £1,200 cost of therapy sessions associated to the course, £672 towards travel expenses and £1,128 contribution to their course fees which will allow the applicant to reduce their working hours and focus on their study.   |
| Applicant H | Guildhall School of Music and Drama         | Recommended for Grant | 2000.00 | 2000.00 | The applicant is looking for funding to support the final £2,000 required to study a Masters degree in Music at the Guildhall School of Music. The applicant has received a scholarship from the Guildhall School of Music of £1,000 and a Grant from the Philological Society of £1,000 to support their study. They have also taken out a loan to make up most of the shortfall as well as contributing some savings. They are still £2,000 off their target and are looking for your support so they can undertake their study full-time. At assessment your officer noted that the applicant lives at home with their farther but is over the age to be classified as dependent. The applicant did provide information on their farther's income and if they were dependent their household income would fall under the minimum income standard by £2,472. As the applicant is seeking to study full-time I recommend that funding is awarded to make up the short-fall for this period of study allowing the applicant to focus on their course at the Guildhall School of Music and Drama. |

|             |                         |                       |         |         |   |
|-------------|-------------------------|-----------------------|---------|---------|---|
| Applicant I | University of greenwich | Recommended for Grant | 3000.00 | 2000.00 | <p>The applicant has applied to the Combined Education Charity to fund computer equipment they require to complete a BSc in Information Systems at the University of Greenwich. During the assessment the applicant demonstrated that they are currently living below the Joseph Rowntree Minimum Income Standard. The monthly household income is £673 a month which is made up of one income alongside tax credits, the applicant also has 3 dependant children at Primary School, secondary School and College. The minimum income for a family of this size is £788 a week which they fall well short of before taking into account the cost of equipment and travel. During assessment I checked with the university and they indicated that computer equipment would benefit the applicants study. I also checked with the applicant and they have demonstrated that their is a need for them to work from home while they study due to the distance they are required to travel and due to their personal needs. If committee wish to fund this application I recommend that a £2,000 contribution is made towards the cost of computer equipment.</p> |
|-------------|-------------------------|-----------------------|---------|---------|---|

Applications for Individuals Recommended for Rejection

|             |                                       |                           |         |      |   |
|-------------|---------------------------------------|---------------------------|---------|------|---|
| Applicant J | The London School of Beauty & Make-up | Recommended for Rejection | 3000.00 | 0.00 | <p>The applicant is looking for your support to fund a VTCT Level 3 Beauty Therapy Diploma at the London School of Beauty and Make-Up. They have recently completed a level 2 Diploma and are now eligible to proceed to the level 3. The course starts in January and is for 6 months until June 2017. They have provided details for their personal situation and between the applicant and their partner they currently earn around £34,800 between them annually. Taking their rent into consideration the minimum income standard is £30,996. However the applicant will need to drop down to part-time hours as well as paying for equipment for the course. Bearing this in mind their annual household income will reduce to £29,520 bringing them just below the minimum income standard. With this in mind I recommend funding of £2,949 for the cost of the Course fees for the VTCT Level 3 Beauty Therapy Diploma at the London School of Beauty and Make-Up. Although this application is eligible for funding I am recommending it for rejection due to budget constraints. The applicant has also not started their course yet so will not be impacted financially.</p> |
|-------------|---------------------------------------|---------------------------|---------|------|---|

|             |  |                           |         |      |   |
|-------------|--|---------------------------|---------|------|---|
| Applicant K | School of Oriental and African Studies | Recommended for Rejection | 740.00  | 0.00 | The applicant was awarded £3,000 by the Combined Education Charity in 2015 towards their tuition fees. £2,260 was then paid towards the applicants fees as they had received a career development loan to cover the rest of the course costs. The applicant was advised that if they wished to apply for the remaining £740 then they would be required to submit a new application to us. The application we have received is requesting £740 towards living expenses while the applicant studies. However the course they were attending came to an end in September 2016. I cannot recommend this application for funding as you cannot fund retrospectively and the applicant is no longer attending the original institution at time of consideration. |
| Applicant L | Pimlico Academy                        | Recommended for Rejection | 3000.00 | 0.00 | The applicant is looking for your support to pay for a Lap top, clothing, equipment and travel costs that will be incurred studying throughout sixth form. The applicant lives with their father who is in receipt of Employment and Support Allowance. Although the applicant has presented a case for support they fall outside your eligibility as the applicant will not be attending a Further or Higher Educational institution and Pimlico Academy is not sponsored by the City of London.   |
| Applicant M | London Metropolitan University         | Recommended for Rejection | 3000.00 | 0.00 | The applicant is currently studying an MA in Conference Interpreting at Metropolitan University London. The applicant is specialising in Russian as part of their studies and would benefit from attending an intensive study course in Russia during the summer of 2017. Although the applicant has demonstrated the educational value of this activity I am not recommending funding as the programme and school are based in Russia.   |



| Withdrawn Applications |                      |           |         |      |   |
|------------------------|----------------------|-----------|---------|------|---|
| Applicant N            | Middlesex University | Withdrawn | 3000.00 | 0.00 | The applicant has withdrawn their application as they will be deferring their place until September 2017. |

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**CENTRAL GRANTS PROGRAMME  
CITY EDUCATIONAL TRUST FUND**

**ASSESSMENT CATEGORY -**

**Friends of the Guildhall Art Gallery (FOGAG)**

**Amount requested: £6,000**

**Amount recommended: £6,000**

**Purpose of grant request:** To provide funding for a 6 month internship in conservation at the Guildhall Art Gallery.

**The Charity**

Set up in 2004 Friends of the Guildhall Art Gallery (FOGAG) exist to support and coordinate education, research and publishing that furthers the purposes of the Guildhall Art Gallery.

**Background and detail of proposal**

FOGAG have been supporting the funding of conservation internships at the Guildhall Art Gallery for the last 9 years. The annual bursary of £8,000 is awarded to a recent conservation graduate who has historically come from the Courtauld Institute of Art. The 6 month placement allows the intern to gain work experience conserving the collection of art held at the Guildhall Art Gallery. Up until recently, this programme was supported by the National Association of Decorative and Fine Arts (NADFASS). Due to other funding commitments they are unable to support this programme for the September 2017 intake. £2,000 has already been secured by the charity from the Radcliffe Trust, funding is sought to make up the shortfall.

**Financial Information**

Forecast income in the current year ending 31 December 2016 is £5,828 of which £5,828(100%) is confirmed by November 2016. The charity has a pattern of overspending that is supported by their reserves. In comparison to their turnover their reserves are high and in the year ending 31 December 2016 the organisations unrestricted reserves relate to 50 months of the organisations expenditure. The organisation explained at assessment that these funds, although not designated in the accounts, will be used in the future for the future acquisition of pieces of art for the Guildhall Art Gallery, which would could require significant investment.

| <b>Year Ended 31 December</b>                    | <b>2015 Independently Examined accounts</b> | <b>2016 Forecast accounts</b> |
|--|---|-------------------------------|
| Income   | 17,805                                      | 5,828                         |
| Expenditure                                      | 19,936                                      | 8,717                         |
| Surplus/deficit                                  | (2,131)                                     | (2,888)                       |
| Free reserves<br>(number of month's expenditure) | 33,784 (20)                                 | 36,208 (50)                   |

**Recommendation**

This application is to support the £6,000 funding required to pay for the bursary of a 6 month conservation intern at the Guildhall Art Gallery. This project fits with the objects of the City Educational Trust as it will support study in the cultural arts and the organisation applying has a strong connection to the City of London. The project will also have considerable additional benefit to the Conservation of the Art at the Guildhall Art Gallery. Funding is recommended as follows:

**£6,000 towards the bursary cost of the Conservators Internship at the Guildhall Art Gallery for the September 2017 intake.**

**CENTRAL GRANTS PROGRAMME  
CITY EDUCATIONAL TRUST FUND**

**ASSESSMENT CATEGORY -**

**NATIONAL CAMPAIGN FOR THE ARTS (CHARITY)  
LIMITED**

**Amount requested: £25,000**

**Amount recommended: £5,000**

**Purpose of grant request:** Funding is sought for a contribution of £5,000 annually over a 5 year period towards staff time spent on producing the Arts Index a national publication.

**The Charity**

The National Campaign for the Arts was founded in 1985 as the UK's independent lobbying organisation representing the arts. Since 2012, under the chair of Samuel West, the charity has re-focussed their activities on engagement campaigns to raise awareness of the role of public funding for the arts throughout the UK. They have produced the Arts Index since 2007, a publication that provides a snapshot report of the health of England's arts and cultural provision.

**Background and detail of proposal**

The Arts Index is a publication that provides a snapshot report of the health of England's arts and cultural provision and provides Arts organisations across England with statistical information and evidence to support funding proposals and local delivery. The publication has been running since 2007 and has been majority supported by donations or in-kind support.

**Financial Information**

Forecast income until 31 March 2016 is £24,400 of which £15,000 (61%) is confirmed as at November 2016. October 2014 to March 2016 the charity did have hardly any turnover due to a loss in donations and support and due to a re-organisation of the board. The Arts Index still managed to publish due to pro-bono and in kind support provided by partners but with new funding secured from the Arts Council in 2016 they plan to diversify their funding and make the organisation more sustainable.

| <b>Year Ended 31<br/>March 2016</b>                 | <b>2014 -2016<br/>Unaudited<br/>accounts</b> | <b>2016<br/>Forecast</b> |
|---|--|--------------------------|
| Income  | 1,091  | 24,400                   |
| Expenditure   | 765  | 22,200                   |
| Surplus/deficit                                     | 326  | 2,200                    |
| Free reserves<br>(number of month's<br>expenditure) | 1,043 (16.5)                                 | 3,243 (1.8)              |

**Recommendation**

The organisation is well-established in the Arts sector and the Arts Index is an important publication that has National significance to the cultural arts. Although the organisation has had a difficult 2 years it was clear at assessment that they were beginning to grow and have a strong board of trustees leading this work.

Commitment to their work by the Arts Council has been secured for 2016/17. As it is unclear at this stage how the organisation will generate income over the next 5 years it is recommended that you support this work for a one year period in line with the Arts Council support. The application fits with the objects of the charity as it advances research in the cultural arts, is charitable activity and has England wide significance. Funding is recommended:

**£5,000 over 12 months to support a contribution to the sessional staff costs required to produce the annual Arts Index publication.**

**CENTRAL GRANTS PROGRAMME  
CITY EDUCATIONAL TRUST FUND**

**ASSESSMENT CATEGORY -**

**Queen Mary University of London**

**Amount requested: £8,500**

**Amount recommended:£8,500**

**Purpose of grant request:** To support the running costs of two Science, Technology, Engineering and Maths (STEM) Summer School in 2017 for local young people.

**The Charity**

Queen Mary University of London is an exempt charity that has been operating since 1885 in East London. A member of the University of London, Queen Mary offers a range of academic study programmes as well as engaging with their local community in East London.

**Background and detail of proposal**

This application is to support the running costs of two STEM Summer schools for young people from across London. The university has noticed that there are not enough opportunities for young people to understand how STEM subjects can be applied in the academic and working world. This programme aims to provide the opportunity for 30 young people from disadvantaged backgrounds to engage on a three day summer school where they will attend workshops and activities delivered by academic staff and student ambassadors. The programme will provide the young people with the opportunity to experience and understand real world applications of STEM subjects.

The total cost of the programme is £18,500 for the 2 summer schools with £10,000 already secured from the David and Claudia Harding Foundation. Funding is sought to make up the shortfall to the overall cost of the project.

During assessment the applicant demonstrated how Queen Mary had a strong connection to the City as some of their campus is based within the Square Mile.

**Financial Information**

Income for the year end 31 July 2016 was £403,171,000. As a university the organisation has very large turnover and requires significant cash flow to support the running of operations. Funding for the summer school is for very specific work with disadvantaged children and young people in London. Funding for these specific projects still needs to be sought from grant making bodies in order for them to take place as they fall out of the central funding of the institution.

**Recommendation**

Queen Mary University are a well-established academic institution based in tower hamlets. This programme fits with the objects of the charity as it is looking to advance the education of disadvantage young people in science and technology. Funding is recommended as follows:

**£8,500 to support the running costs of two Science, Technology, Engineering and Maths (STEM) Summer Schools in 2017 for 30 year 10 students from across London.**



**CENTRAL GRANTS PROGRAMME  
CITY EDUCATIONAL TRUST FUND**

**ASSESSMENT CATEGORY -**

**Prisoners of Conscience (PoC) Appeal Fund**

**Amount requested: £45,000**

**Amount recommended: £0**

**Purpose of grant request:** To provide Bursary funding for former prisoners of conscience to allow them to take up post-graduate and professional conversion courses. Funding over a three year period will allow four or five former prisoners of conscience annually to engage in post-graduate study in London.

**The Charity**

Originally established in 1962 as the relief arm of Amnesty International the Prisoners of Conscience (POC) Appeal Fund is an independently constituted Charity. A grant making organisation they make grants specifically to prisoners of conscience – individuals who have been persecuted for their conscientiously held beliefs, provided that they have not used or advocated violence. Their grant recipients include political prisoners, human rights defenders, teachers and academics who come from different countries such as Burma, Zimbabwe, Sri Lanka, Tibet, Iran and Eritrea.

**Background and detail of proposal**

This application is to support three to five bursaries for former prisoners of conscience to attend post-graduate courses in London on an annual basis. Your funding will support only those beneficiaries who are wishing to study in London. Funding is ought to cover the cost of these bursaries over a 3 year period.

During assessment it was not clear how this work has a sufficiently strong connection to the City of London or its residents. Historically they have received funding from the City and in 2015 received a grant of £25,000 to their core running costs.

**Financial Information**

Forecast income in the current year is £350,642 of which £238,649 (68%) is confirmed by November 2016. The charity is off its fundraising target for the year as they received an overestimated legacy payment in June this year from CAF. In November they were contacted by CAF and informed that a mistake had taken place and that half of the payment needed to be returned. This has had an effect on their fundraising and on the amount of money they had allocated to bursaries. This means that almost all of their unrestricted free reserves will be lost for 2016 putting them in a precarious position financially.

| <b>Year Ended 31 December</b>                 | <b>2015 Independently Examined accounts</b> | <b>2016 Forecast accounts</b> |
|---|---|-------------------------------|
| Income  | 303,264                                     | 350,642                       |
| Expenditure                                   | 322,309                                     | 355,740                       |
| Surplus/deficit                               | (19,045)                                    | (5,098)                       |
| Free reserves (number of month's expenditure) | 114,417 (4.3)                               | 109,319 (3.7)                 |

### **Recommendation**

The organisation is providing Bursary Grants to former prisoners of conscience. The Bursary covers the cost of undertaking post-graduate courses. Although during assessment it was demonstrated that this course would focus on the advancement of education it is not specific to any of the disciplines listed in the objects and therefore the offering is broad. No specific clarification has been made that this programme advances the objects of the City Education Trust and apart from receiving historic funding from the City it is also unclear whether this would be classified as a strong connection or benefit residents. During assessment it also became clear that the organisation is currently in a difficult financial situation which would make this application be seen as a financial risk to support at this stage. It is deemed that your funding will make up a shortfall in their bursary budget for bursaries already committed rather than deliver a specific programme with your funding. For these reasons I am not going to recommend for funding.

**CENTRAL GRANTS PROGRAMME  
CITY EDUCATIONAL TRUST FUND**

**ASSESSMENT CATEGORY -**

**Mount Carmel Catholic College for Girls\***

**Amount requested: £30,000**

**Amount recommended: £0**

**Purpose of grant request:** To develop an extra-curricular programme from September 2017 for 12 months that improves students health and well-being while developing their understanding of ecology and the cultural arts.

**The Organisation**

Mount Carmel Catholic Girls School will re-open in September 2017 as the City of London Academy Highgate Hill. The school will be a new mixed, non-faith, non-selective school taking boys and girls. As the school will soon be a City sponsored Academy they believe this fits with your criteria of having a sufficiently strong connection to the city.

**This Application was withdrawn after discussion with your officer at assessment. The applicant is going to look at submitting a new application in the New Year that more closely aligns with the objects of the City Educational Trusts.**



|   |   |
|---|---|
| <b>Committee:</b><br>Education Charity Sub-Committee  | <b>Dated:</b><br>12 <sup>th</sup> December 2016 |
| <b>Subject:</b><br>Development of Policy to Guide Application of charitable funds – City Educational Trust Fund, Combined Education Charity | <b>Public</b>                                   |
| <b>Report of:</b><br>Chief Grants Officer   | <b>For Decision</b>                             |
| <b>Report author:</b><br>Scott Nixon, Central Grants Unit   |   |

## Summary

Following the recent cross-cutting service based review of grant-making by the City Corporation, the 'Education and Employment' funding theme, which forms part of the new Central Grants Programme (CGP), opened to applications on 15<sup>th</sup> August 2016.

The two charities providing funding through this theme are the City Educational Trust Fund (290840) and The City of London Corporation Combined Education Charity (312836).

It was agreed by Members of Community and Children's Services Committee and Education Board that the existing eligibility criteria for both charities would remain in place until March 2017, but that the criteria would be reviewed by the Education Charity Sub-Committee for recommendation to the Education Board for approval. It was also agreed that the revised policy to guide the application of funds for each charity be implemented for the 2017/2018 funding cycle. It was recognised that there was the possibility for alignment of the activities of the charities with the City of London Corporation's Education Strategy 2016-2019. This paper provides background to inform Members' discussion noting that decisions must be taken in the best interests of each charity.

## Recommendations

It is recommended to Members that they:

1. Consider the charitable objects of the City Educational Trust Fund (290840) and The City of London Corporation Combined Education Charity (312836), and the funds available for distribution in each case;
2. Consider the evidence of need within each charity's beneficiary class and make recommendations to the Education Board, which are in the best interests of each charity, as to the policy criteria which should be adopted for each charity to guide the effective application of charity funds;
3. To instruct officers to prepare a revised policy and application criteria for each charity for recommendation to the Education Board.

## Main Report

### Background

1. On 19 May 2016, the Policy and Resources Committee agreed that the Education Board be appointed as the Grand Committee responsible for managing the City Educational Trust Fund (290840) and The City of London Corporation Combined Education Charity (312836) (“Combined Education Charity”) The City Corporation is the sole corporate trustee of each charity and administers each charity in accordance with its usual procedures, which involve delegating the exercise of those trustee functions to various committees (and sub-committees) of the Court of Common Council.
2. Those trustee obligations remain with the City Corporation and individual elected Members of the Court sitting as members of the Committees and sub-committees with responsibility for each charity are not themselves trustees. However, by virtue of their membership of the relevant Committee or sub-committee Members have a duty to support the City Corporation in the exercise of its duties as trustee by faithfully acting in accordance with the terms of reference of the relevant Committee and the City Corporation’s corporate governance framework, and thereby in managing each charity’s affairs on the City Corporation’s behalf to support the City Corporation’s compliance with its trustee duties.
3. At the July 2016 Education Board Members agreed that the existing eligibility criteria for the Combined Education Charity and City Educational Trust Fund would remain in place until March 2017. The Education Board also agreed that Education Charity Sub-Committee review the funding criteria and to consider how it may be possible to align the activities of each charity with the City Corporation’s Education Strategy which has been adopted by the Common Council. It was also agreed that any revised policy and criteria should be implemented before the 2017/2018 funding cycle.
4. The charitable objects, or purposes, of each charity are set out at **Appendix 1** and each charity operates to further education for the public benefit. There is some overlap in the purposes of each of the charities to which this report relates, and in the persons who may benefit from each charity. The City Corporation as trustee of each charity must be able to demonstrate that it is carrying out the charity’s purposes for the public benefit, whether the general public or a sufficient section of the public. A charity’s trustee, in this case the City Corporation (acting by this sub-committee), must ensure that decisions are taken in the best interest of each charity, and they must exercise independent judgement in doing so. A charity’s trustee has an obligation to keep the charity’s activities and expenditure under review and should regularly consider whether there are more effective ways of furthering their charity’s objects.
5. Each charity has relatively small sums available for distribution, and holds some income in unrestricted funds which are available for distribution ( which may reduce subject to grant decisions arising elsewhere on your agenda

today and which include the deduction of management fees, as referred to in paragraph 6): City Educational Trust Fund:- 2016/17 – £82,053, 2017/18 (estimated) £82,000. Combined Education Charity: - 2016/17– £25,168; 2017/18 (estimated) –£25,000.

6. In the past the City Corporation has met the costs of administering the charities from its own funds. Following the cross-cutting review of grant-making the City Corporation has resolved that the costs of administering these charities should be met by each charity. This is a permissible expenditure, but a responsible trustee should look to adopt an administrative and management framework which is efficient and effective to support maximum expenditure of funds to further the charity's aims, rather than on unnecessary administration. Therefore, the policy and criteria to be adopted going forward should, noting the small sums of money available for distribution, factor in these considerations. It is also noted that the City Corporation has resolved to keep the management charges under review as the new Central Grants Programme beds in. These have been agreed up to a threshold of 12 % of income available for distribution from each charity.
7. A financial overview of both charities is included in **Appendix 2**. This includes details on the;
  - Current financial position of both charities, including a 5 year overview of the investment income generated.
  - Applications that were approved by the Combined Education Charity in 2015-2016;
  - Grants approved between 2014-2016 by the Finance Committee or Finance Grants Sub-Committee which utilised funding from the City Educational Trust Fund;
8. The current eligibility criteria for both charities are provided at **Appendix 3 & 4**. These criteria are no longer considered to provide the most effective framework to guide the application of each charity's limited funds. In particular, experience of distribution under those criteria has demonstrated that distribution of small grants is resource intensive, the programmes have not been particularly cohesive, and therefore it has been difficult to assess the impact of each charity's activities.
9. The City Corporation has a long history of undertaking various and diverse educational functions and activities, and the two charities (or in the case of the Combined Education Charity, their predecessor funds) were established under the administration of the City Corporation consistent with the organisation's general interest in promoting and supporting education at all ages.
10. The City Corporation has taken active steps in recent years to analyse and assess its work in education and to identify how it can do more to address educational need and to enhance educational provision and opportunities. It has recently agreed an Education Strategy 2016 – 2019 which is provided at **Appendix 5** and was agreed by the Court of Common Council following

research and consultation with stakeholders. The Education Strategy's three strategic objectives are listed below.

- Strategic Objective 1 - We will ensure that the City Corporation's outstanding cultural and historical resources enrich the creative experience of London's learners.
- Strategic Objective 2 - We will ensure that all existing education providers are deemed 'outstanding' within three years and that there is continued development of excellent further, adult and higher education opportunities. Any new school, academy or other providers will be expected to be judged 'outstanding' within three years of joining the City Corporation's education portfolio.
- Strategic Objective 3 - We will ensure that young Londoners in the City's schools and beyond have access to the information, advice and experiences that will help them into fulfilling careers.

## Proposals

11. Members have already recognised that there is a possibility for alignment of the activities of the charities with the City of London Corporation's Education Strategy 2016-2019 going forward to leverage more impact from the charities' funds and to reduce costs of charity administration. In setting the policy to guide the application of each charity's funds the City Corporation as trustee will need to take its decisions in the best interests of each charity.
12. Having regard to the small sums available for distribution from each charity, officers would recommend that the City Corporation as trustee in each case adopts a common policy which would reduce the costs of administration. Officers would also recommend that Members consider either adopting a very light –touch grants assessment process for small grants up to £5000; or alternatively that larger grants of around £25,000 are awarded from each charity with suitable due diligence (and the number of sub-committee meetings adjusted accordingly), thereby reducing the costs of administration.
13. Officers have identified areas of commonality in the charitable purposes of the two charities, which educational aims, it is recommended, could be furthered by aligning an educational grants programme with the City Corporation's historic and cultural offer. Specifically, funding could be provided in a complementary (and more integrated/structured way) to access that provision or to enhance learning and teaching associated with that provision; and could also focus on enhancing teaching in, and stimulating participation in, STEM subjects, for example. It is suggested that the programmes are opened to both maintained and academy primary schools in Greater London in the case of the City Educational Trust Fund and, in the case of the Combined Education Charity, maintained and academy secondary schools in Greater London. Grants could be provided to fund equipment and materials, as well as travel and teaching costs.



## **Conclusion**

14. Members are invited to discuss the proposals and instruct officers to work up criteria to inform the new policy to guide grant-making from each charity to recommend to the Education Board for approval, noting that the Community and Children's Services Committee may also wish to comment prior thereto, as provided under their Terms of Reference.
15. Any policy must not be unduly restrictive and must benefit a sufficient part of a charity's beneficiary class to ensure the charity's activities are furthering the charity's objects/purposes for the public benefit. The policy and procedures developed should also support the efficient and effective operation of the relevant charity so the charity's funds are applied to achieve the charity's purposes.

## **Background Papers**

- (a) Policy and Resources Committee (Item 10), 17 March 2016.
- (b) Court of Common Council (Item 22, referred from the Education Board), 21 April 2016.
- (c) Education Board (Item 8), 12 May 2016.
- (d) Community and Children's Services Committee (Item 9), 13 May 2016.
- (e) Community and Children's Services Committee (Item 9), 8 July 2016.
- (f) Education Board (Item 10), 21 July 2016.

## **Appendices**

Appendix 1: Objects of the Combined Education Charity and the City Educational Trust Fund

Appendix 2: Financial Overview

Appendix 3: Current Combined Education Charity, eligibility criteria

Appendix 4: Current City Educational Trust Fund, eligibility criteria

Appendix 5: Education Strategy 2016-2019

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## 1. Charitable Objects of the Combined Education Charity

The objects of the Charity are for the public benefit:

- 1) To further the education of persons (including persons born or resident in the City of London and those attending educational institutions in the City of London or the other London Boroughs) attending or proposing to attend secondary, further or higher educational institutions by the provision of grants or financial assistance and by arranging or supporting education and training to extend or complement courses provided by such institutions;
- 2) To provide grants for staff at maintained schools and Academies in the City of London and the other boroughs of London to undertake studies either at educational institutions or at other establishments provided that such study furthers their development as teachers

## 2. City Educational Trust Fund

The charity was established around the same time as the Royal Charter was granted to establish The City University. The charity was established by section 25 of the City of London (Various Powers) Act 1967 (set out below) and both the income and capital may be applied to further the charity's purposes.

In summary, the purposes of the charity are – for the advancement of education for the public benefit by:

The advancement of the objects of The City University or for other educational purposes connected with or related to the University; and

The advancement of: -

- (i) education in science and technology, business management and commerce by the promotion of research, study, teaching and training in any of them; or
- (ii) the study and teaching of biology and ecology; or
- (iii) research, study and teaching in the cultural arts.

### CITY OF LONDON (VARIOUS POWERS) ACT 1967 (1967 c xlii)

[The preamble to the Act states:]

*... (3) Among the objects of The City University as constituted by Royal Charter is the advancement of research and training in science and technology and in business management and commerce and it is expedient to authorise and to require the Corporation to hold for educational purposes, including purposes relating to the objects of the said university, a fund called the Coal Market Fund now vested in them: ...*

## 25 Application of Coal Market Fund for educational purposes

Whereas by the enactments specified in Schedule 3 to this Act (in this section referred to as “the City of London Coal Market Acts”) provision was made for the continuance of a public market for the sale of coals brought into London and for empowering the Corporation to remove, enlarge and manage the said market but, following the passing of the Coal Industry Nationalisation Act 1946, the said market ceased to exist and, under powers conferred on the Corporation by the City of London Coal Market Acts and by the City of London (Various Powers) Act 1949, the site of the said market has been appropriated for other purposes.

And whereas in accordance with the provisions of the enactments hereinbefore referred to there is vested in the Corporation a fund established for payment of the costs of providing, enlarging and managing the said market, to which fund is now credited the balance of revenues received in respect of the said market after payment of the costs of managing the same so long as it continued to exist and the consideration payable on appropriation of the site of the said market, together with accumulations of interest:

And whereas it is expedient on the repeal of the City of London Coal Market Acts as provided in section 31 (Repeal) of this Act to make new provision prescribing the purposes for which the said fund shall be held and applied by the Corporation:

Now therefore it is hereby declared that the said fund, now known as the “Coal Market Fund” and thereby designated the “City Educational Trust Fund” and hereby designated the “City Educational Trust Fund”, shall, as from the passing of this Act, be held by the Corporation, and the capital and interest shall be applied by the Corporation as they think fit, for such one or more of the following purposes as they may from time to time determine:—

- (1) for the advancement of the objects of The City University constituted by Royal Charter granted on 23rd May, 1966, or any of such objects, or for other educational purposes connected with, or related to, the said university;
- (2) without prejudice to the generality of the foregoing paragraph, for the advancement of education in science and technology, business management and commerce by the promotion of research, study, teaching and training in and of such subjects, or any of them, or, without prejudice to the generality of the foregoing, for the advancement of the study and teaching of biology and ecology, or for the advancement of research, study and teaching in and of the cultural arts.

## **Financial Overview of the City Educational Trust Fund and Combined Education Charity**

1. As at 1st April 2016, the Combined Education Charity had total funds of £1,037,875 of which £988,248 was held in investments and the remainder in cash (less any commitments).
2. The total assets of the Combined Education Charity are split into two funds, the unrestricted fund which is the general fund of the Charity and was worth £358,445 in 2015/16 and the expendable endowment fund which was worth £679,430. The expendable endowment fund is the original gift / endowment of the Charity shown at current market value.
3. As at 1st April 2016, the City Educational Trust Fund had total funds of £3,432,337 of which £3,302,563 was held in investments and the remainder in cash.
4. The total assets of the City Educational Trust Fund are split into two funds, the unrestricted fund, which is the surplus income fund of the charity to be used in subsequent years, which was worth £72,566 and the expendable endowment fund which was worth £3,359,771. The expendable endowment fund is the original endowment of the Charity shown at current market value.
5. In the case of the Combined Education Charity, the City Corporation as trustee must firstly make use of the charity's investment income; and if the trustee thinks fit, the expendable endowment in order to meet the costs of administering the charity and managing its assets. After payment of these costs the trustee must use the remaining income to further the objects of the charity.
6. The trustee is also permitted to utilise the expendable endowment funds, and with Charity Commission consent the permanent endowment, to further the charity's objects, if the trustee considers that it would be in the best interests of meeting the charity's objects to do so.
7. The City Educational Trust Fund, constituted under section 25 of the City of London (Various Powers) Act 1967, which provides that both the income and capital of the charity may be applied to further the charity's objects should it be considered to be in the best interests of the charity.
8. Members are asked to note that the funding made available to issue in grants for the City Educational Trust Fund and Combined Education Charity is generated on an annual basis through investment income from the charitable funds. An overview of the investment income generated for both charities over the past 5 years is provided below in Table 1 and 2 below.

**Table 1:  
Investment Income 2012-2017 (Combined Education Charity)**

| Year    | Interest on cash balances | Dividend income | Total received |
|---------|---------------------------|-----------------|----------------|
| 2011/12 | 4,443                     | 20,983          | 25,426         |
| 2012/13 | 1,082                     | 29,939          | 31,021         |
| 2013/14 | 767                       | 38,693          | 39,460         |
| 2014/15 | 514                       | 38,819          | 39,333         |
| 2015/16 | 299                       | 37,602          | 37,901         |
| 2016/17 | TBD                       | 22,645          | 22,645         |

**Table 2:  
Investment Income 2012-2017 (City Educational Trust)**

| Year    | Interest on cash balances | Total dividend income | Total received |
|---------|---------------------------|-----------------------|----------------|
| 2011/12 | 3,193                     | 103,020               | 106,213        |
| 2012/13 | 3,176                     | 100,052               | 103,228        |
| 2013/14 | 1,469                     | 129,305               | 130,774        |
| 2014/15 | 925                       | 129,728               | 130,653        |
| 2015/16 | 447                       | 125,658               | 126,105        |
| 2016/17 | TBD                       | 75,675*               | 75,675         |

\*The second annual dividend income payment is expected end March 2017.

9. The table below shows all grants approved and rejected by the Combined Education Charity Panel in 2015-2016. In summary, a total of 42 applications were received and assessed by the Combined Education Charity Panel, eight of which were rejected or deferred and thirty five approved, totalling £95,352 awarded in grants.

| Date of Award | Level of Study and Course                        | Educational Establishment           | Total award granted |
|---------------|--|-------------------------------------|---------------------|
| June 2016     | Masters in Character Animation                   | Central St Martins                  | £2,550              |
|               | Masters in Music                                 | Guildhall School of Music and Drama | £3,000              |
|               | Postgraduate Degree, Speech and Language Therapy | University College London           | £1,000              |
|               | MA in Creative Writing                           | Kingston University                 | £2,500              |
|               | Outreach for Teachers Programme                  | King's College Maths School         | £3,000              |

## Appendix 2

| Date of Award | Level of Study and Course                                | Educational Establishment                        | Total award granted                       |
|---------------|--|--|---|
|               |  |  | <b>Total awarded April 2016 = £12,050</b> |
| April 2016    | BA in English  | University of Cambridge                          | £3,000                                    |
|               | BMus Classical Performance                               | Guildhall School of Music and Drama              | £3,000                                    |
|               | MA in Performance  | Royal Academy of Music                           | £3,000                                    |
|               | MSc in Mental health Studies                             | Institute of Psychiatry, King's College          | £3,000                                    |
|               | Advanced Instrumental Studies                            | Guildhall School of Music and Drama              | £3,000                                    |
|               | Theatrical studies                                       | Italia Conti Academy of Theatre Arts             | No longer needed                          |
|               | MSc in Public Policy                                     | University College London                        | £3,000                                    |
|               | MA in Character Animation                                | University of the Arts London                    | £3,000                                    |
|               | LLB Law course   | City University                                  | £2,952                                    |
|               | BA Hons Education Studies                                | University of London                             | £2,670                                    |
|               | Orchestral Artistry course                               | Guildhall School of Music and Drama              | £3,000                                    |
|               |  |  | <b>Total awarded April 2016 = £32,622</b> |
| December 2015 | Professional studies                                     | Architectural Association School of Architecture | Rejected (insufficient evidence of need)  |
|               | MSc Civil Engineering Structures Post Graduate           | City University London                           | Rejected (insufficient evidence of need)  |
|               | MA Acting Course   | Arts Education Schools London                    | £2,000                                    |
|               | Social Anthropology of development                       | SOAS University                                  | £3,000                                    |
|               | Postgraduate course in Mental Health, Ethics and Law MSc | King's College London                            | £3,000                                    |
|               | MA in Script   | Goldsmiths                                       | £2,950                                    |

Appendix 2

| Date of Award  | Level of Study and Course   | Educational Establishment              | Total award granted                             |
|----------------|---|--|---|
|                | Writing   | University                             |   |
|                | Living costs and extra-curricular activities relating to a course | Queen Mary University                  | Application deferred due to lack of information |
|                | MSc in Psychology   | University College London              | Application deferred due to lack of information |
|                | Tuition fees  | News Associates London                 | Application deferred due to lack of information |
|                | VTCT in Beauty Therapy  | London School of Beauty and Make up.   | Application deferred due to lack of information |
|                | Tuition fees  | Goldsmiths College                     | Application deferred due to lack of information |
|                |   |  | <b>Total awarded December 2015 =£10,950</b>     |
| September 2015 | MA Degree   | School of Oriental and African Studies | £3,000  |
|                | MA Degree   | Central Saint Martins                  | £3,000  |
|                | MA Degree   | Royal College of Arts                  | £3,000  |
|                | Three day educational visit to Berlin for 40 students             | City of London Academy Islington       | £3,000  |
|                | MA Degree   | Royal College of Art                   | £3,000  |
|                | MA Degree   | Royal Academy of Music                 | £3,000  |
|                | MA Degree   | Roehampton University                  | £3,000  |
|                | Script Development Diploma  | National Film and Television School    | £3,000  |
|                |   |  | <b>Total Awarded September 2015 = £24,000</b>   |
| May 2015       | 55 Students immersive experience in opera                         | English National Opera                 | £3,000  |
|                | Degree in Psychology  | University of East London              | £1,030  |
|                | MRes/PHD in Anthropology  | Goldsmiths University                  | £3,000  |



Appendix 2

| Date of Award | Level of Study and Course               | Educational Establishment                   | Total award granted                     |
|---------------|---|---|---|
|               | MSc in Finance                          | Warwick Business School                     | £3,000                                  |
|               | Postgraduate Certificate in Art Therapy | Institute of Arts and Therapy and Education | £3,000                                  |
|               | Masters in Millinery                    | Royal College of Art                        | £2,700                                  |
|               |   |   | <b>Total Awarded May 2015 = £15,730</b> |

10. The table below shows all grants approved between 2014-2016 by the Finance Committee or Finance Grants Sub-Committee, which utilised funding from the City Educational Trust Fund.

11. In summary, six grant applications were awarded funding from the City Educational Trust Fund in 2014 totalling £160,200. One further grant was approved in 2016 for an amount of £20,000.

| Grantee                   | Date of Award | Length of Award  | Description of project supported   | Total award granted |
|---------------------------|---------------|--|--|---------------------|
| The Foundling Museum      | May 2014      | 1 Year   | Exhibition on the life and times of Dr. Richard Mead at the Foundling Museum.  | £15,000             |
| St Paul's Chorister Trust | May 2014      | 3 Years (Reducing grant over three years – Year 1- 15k Year 2- 12.5k Year 3- 10k. And a one off grant for special projects for £15k. | Provision of financial bursaries to families on low incomes to support the costs of boarding. The Chorister Trust currently provides a financial bursary to 13 out of the 28 Choristers. | £37,500             |
| Clio's Company            | November 2014 | 1 Year   | A grant towards the cost of developing new drama   | £7,700              |

Appendix 2

| <b>Grantee</b>            | <b>Date of Award</b> | <b>Length of Award</b> | <b>Description of project supported</b>  | <b>Total award granted</b>              |
|---------------------------|----------------------|------------------------|--|---|
|                           |                      |                        | education workshops.   |   |
| Spitalfields Music        | November 2014        | 3 Years                | Support for general project activity and support for on-going fundraising.   | £45,000                                 |
| Dr Johnson's House        | November 2014        | 3 Years                | Projects to engage with new audiences and students.  | £45,000                                 |
| Youth Dance England       | November 2014        | 1 Year                 | Making dance activities accessible to young people with disabilities.  | £10,000                                 |
|                           |                      |                        |  | <b>Total Awarded in 2014 = £160,200</b> |
| Royal Shakespeare Company | May 2015             | 3 Years                | A three year programme that works with students and teachers to transform students attitudes to Shakespeare and through doing so influence their attitudes to school more generally and their overall academic attainment. | £20,000                                 |
|                           |                      |                        |  | <b>Total Awarded 2015 = £20,000</b>     |



# The City of London Corporation Combined Education Charity (312836)

## Grants Policy and Funding Eligibility Criteria

### *The Purposes of the Charity:*

The purposes of the charity are to benefit the public by:

- (a) Furthering the education of persons attending or proposing to attend secondary, further or higher educational institutions through grants or financial assistance, and by arranging or supporting education and training to extend or complement courses provided by such institutions; and
- (b) Providing grants to staff of maintained schools and Academies in the City of London and the London boroughs to undertake study which furthers their development as teachers.

### *Grants Policy and Eligibility for Funding*

In order to target the Charity's limited funds to most effectively and efficiently achieve the charity's broad purposes to further education, as noted above, the following grants policy and criteria have been adopted when considering all current applications for funding.

#### *Persons Eligible for Funding*

1. Persons who are of secondary school age or above, either –
  - (a) attending a further or higher educational institution in the City of London or one of the London boroughs; OR
  - (b) attending one of the Academies sponsored by the City of London Corporation, The City of London School or The City of London School for Girls; OR
2. A current member of staff at one of the City of London Sponsored Academies, The City of London School or the City of London School for Girls.

Applications under 1(b) may be made on behalf of an individual pupil or on behalf a group of pupils attending the relevant school. Where an application is submitted on behalf of more than one pupil the school must identify the individual pupils who are intended to benefit from the grant and provide sufficient information to support the application being made on behalf of each of them.

This must include evidence of financial need and details of the educational merit and value which would be achieved for those individual pupils should the grant be awarded.

Individuals who are awarded a grant from the Charity will not be eligible for further funding within **5 (five) years** of the decision to award the grant. Organisations applying on behalf of groups are not subject to this restriction.



### *Activities which will be funded*

**For Students**, these include:

- (a) Course fees.
- (b) Equipment and or resources necessary to undertake a course of study e.g. specialist recording equipment, specialist technical equipment, purchase of books and reference materials.
- (c) Travel and associated expenses directly relevant to the course of study or education.
- (d) Expenses associated excursions and travel organised by the school.
- (e) Activities associated with the individual's education (or expense related directly thereto) where the educational merit or value of that activity has been demonstrated in the application.

**For Teachers** these include courses and study for the purposes of professional development as a teacher.

Those who benefit from a grant will be required to provide a written update to the Charity of the outcomes and benefits experienced by those individuals in undertaking the course or activity funded by the grant.

### *Maximum Grant*

The maximum funding which will be awarded to an individual is: **£3,000**.

Where an application for funding is submitted on behalf of more than one person, the grant may exceed this amount but will not exceed £3,000 per individual.

## **1. How do you apply for a grant?**

To apply for a City of London Corporation ("CoLC") grant you will need to complete an online application form by the corresponding deadline and submit this electronically with your supporting documents to the Central Grants Unit.

You should send your application to us well before the stated deadline to allow us to process your application in time. We will only consider one application from you or your organisation at any one time.

All application forms should be completed through the online CoLC Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

## **2. How are applications assessed?**

Once the CoLC has received your online application and all supporting documents it will be passed to one of the Grant Officers for assessment. As part of this process a Grants Officer may contact you for more information.

We will acknowledge receipt of your application within 10 working days of it being received. If your application is not complete it will be returned to you and you will have a further 10 working days to send us the missing information.



Once a full assessment of your application has been completed your request will be referred to the decision-making Committee.

The timescale to process your application will vary; however, we will endeavour to ensure your application is assessed within 12 weeks of the closing date.

### **3. How do we monitor and evaluate grant recipients once an award has been made?**

If we award a grant to you, you will be requested to complete an end of grant monitoring report to confirm how the grant has been spent and what you achieved. Please make sure that you keep receipts for all the items or services you buy with the grant and that you keep them somewhere safe as we may ask you to provide them.

Please keep us up to date if any of your contact details change at any stage during the period of your grant.

### **4. If your grant application is successful**

If your application is successful, an initial offer letter detailing the level of grant awarded will be issued. This may contain special conditions relating to the grant award or pre-agreement grant conditions.

Grant acceptance terms and conditions will be subsequently issued which should be signed and returned within 20 working days.

Once all documentation has been received and approved you would be asked to formally request payment of your grant award.

### **5. If your grant application is unsuccessful**

Unfortunately, due to the limited budget available and the number of applications for funding we receive, the CoLC cannot provide funding to every applicant that applies for a grant. Grants are therefore awarded on a discretionary basis, there is no appeal process and the decision of the CoLC is final.

### **6. Support with your application**

We urge all applicants that are unsure about whether to submit an application to read all available eligibility criteria on our website and attend one of our Grant Officer led workshops; dates for which will be publicised on our website throughout the year.

If you have an enquiry that is not covered within the online guidance, please contact the Grants Unit directly, who will be able provide answers to general queries regarding the application process.

### **7. Can you reapply for funding?**

Individuals who are awarded a grant from the Charity will not be eligible for further funding within **5 (five) years** of the decision to award the grant. Organisations applying on behalf of groups are not subject to this restriction.



## 8. Further information

If you have questions about how to apply or about the status of an application, you can contact us on 020 7332 3722, email us at [grants@cityoflondon.gov.uk](mailto:grants@cityoflondon.gov.uk), or visit our website [www.cityoflondon.gov.uk/centralgrantsprogramme](http://www.cityoflondon.gov.uk/centralgrantsprogramme) to find out more.



# The City of London Corporation City Educational Trust Fund (290840)

## Charitable Purposes

The purposes of this charity are – for the advancement of education for the public benefit by:

1. The advancement of the objects of The City University or for other educational purposes connected with or related to the University; OR
2. The advancement of: -
  - (i) education in science and technology, business management and commerce by the promotion of research, study, teaching and training in any of them; or
  - (ii) the study and teaching of biology and ecology; or
  - (iii) research, study and teaching in the cultural arts.

## Guidelines

The following guidelines will be observed when assessing applications:

- (a) Grants will be given to organisations rather than individuals;
- (b) Under the second object, assistance will be given to organisations having education as an objective or which seek to sponsor the pursuit of further and higher education;
- (c) The applicant must demonstrate **either**: -
  - a sufficiently strong connection with the City of London; for example, that the applicant's beneficiaries are City residents or workers; **or that**
  - the funding will support charitable activity having special nationwide significance or impact.
- (d) Preference will be given to applications for grants to actively further the organisation's objects through its activities, rather than for core costs such as employee salaries etc.; and
- (e) It is unlikely that grants would be made to organisations –
  - already in receipt of financial support through the London Councils' London-wide Grants Scheme and/or the local grants to voluntary organisations scheme,
  - which have historically received a large proportion of their funding from central government or other local government sources, and
  - that have received a grant for similar activities from the City Bridge Trust, the grant-giving arm of the City of London Corporation's charity, Bridge House Estates [1035628] .

NB: The above are 'guidelines' only and the CoLC retains total discretion as to whether an



application falling outside the guidelines but within the charity's objects is supported.

## **Application Procedures**

### **1. How do you apply for a grant?**

To apply for a City of London Corporation ("CoLC") grant you will need to complete an online application form by the corresponding deadline and submit this electronically with your supporting documents to the CoLC Central Grants Unit.

You should send your application to us well before the stated deadline to allow us to process your application in time. We will only consider one application from your organisation at any one time.

All application forms should be completed through the online CoLC Central Grants web portal. Application forms in large print, Braille or audio tape are available to applicants by special request.

### **2. How are applications assessed?**

Once the CoLC has received your online application and all supporting documents it will be passed to one of the Grant Officers for assessment. As part of this process a Grants Officer may contact you for more information.

We will acknowledge receipt of your application within 10 working days of it being received. If your application is not complete it will be returned to you and you will have a further 10 working days to send us the missing information.

A Grants Officer may also arrange to visit you or your organisation as part of the assessment process. Once a full assessment has been completed your request will be referred to the decision-making Committee.

The timescale to process your application will vary; however, we will endeavour to assess your application within 12 weeks of the closing date. You should take account of this when planning your project.

### **3. How do we monitor and evaluate grant recipients once an award has been made?**

If we award a grant to your organisation we will need you to complete an 'end of grant' monitoring report to confirm how the grant has been spent and what you achieved. Please make sure that you keep receipts for all the items or services you buy with the grant and that you keep them somewhere safe as we may ask you to provide them.

We may also visit you to check how the grant has been spent.

Please keep us up to date if your project or any of your contact details change at any stage during the period of your grant.





#### **4. If your grant application is successful**

If your application is successful, an initial offer letter detailing the level of grant awarded will be issued. This may contain special conditions relating to the grant award or pre-agreement grant conditions.

Grant acceptance terms and conditions will be subsequently issued which should be signed and returned within 20 working days.

Once all documentation has been received and approved you would be asked to formally request payment of your grant award.

#### **5. If your grant application is unsuccessful**

Unfortunately, due to the limited budget available and the number of applications for funding we receive, the CoLC cannot provide funding to every applicant that applies for a grant. Grants are therefore awarded on a discretionary basis, there is no appeal process and the decision of the CoLC is final.

#### **6. Support with your application**

We urge all applicants that are unsure about whether to submit an application to read all available eligibility criteria on our website and attend one of our Grant Officer led workshops; dates for which will be publicised on our website throughout the year.

If you have an enquiry that is not covered within the online guidance, please contact the Grants Unit directly, who will be able provide answers to general queries regarding the application process.

#### **7. Can you reapply for funding?**

New applications will not normally be considered from a recipient of a grant within a three year period.

#### **8. Further information**

If you have questions about how to apply or about the status of an application, you can contact us on 020 7332 3722, email us at [grants@cityoflondon.gov.uk](mailto:grants@cityoflondon.gov.uk), or visit our website [www.cityoflondon.gov.uk/centralgrantsprogramme](http://www.cityoflondon.gov.uk/centralgrantsprogramme) to find out more.

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# CITY OF LONDON CORPORATION EDUCATION STRATEGY 2016–2019

## Executive summary

### Our Education Vision

The City of London Corporation (the City Corporation) is committed to providing access to world-class education and learning opportunities. It will optimise the educational opportunities that its cultural, heritage and environmental assets offer. In particular, the City Corporation will provide educational experiences that reflect the common characteristics for which it is world-renowned, combining creativity, innovation and enterprise alongside tradition and continuity. It will also connect City opportunities and the talent of Londoners to reinforce City competitiveness and support London's communities.

Furthermore, the City Corporation's schools will provide educational experiences that enrich and inspire. The City Corporation will also be responsive to and influence the changing education landscape, welcoming appropriate opportunities to expand its education portfolio and extend educational opportunities.

### Strategic Objectives

#### **1. We will ensure that the City Corporation's outstanding cultural and historical resources enrich the creative experience of London's learners.**

##### Prioritised Actions:

- a) Maximise access to the City Corporation's cultural venues by London's pupils through a school visits fund.
- b) Provide further opportunities for the City Corporation's cultural venues to work together to offer innovative learning programmes and resources that benefit learners across London and beyond.
- c) Establish a City of London Cultural Education Partnership.
- d) Promote the national science, technology, engineering and mathematics (STEM) education agenda through working in partnership across our venues.

- 2. We will ensure that all existing education providers are deemed ‘outstanding’ within three years and that there is continued development of excellent further, adult and higher education opportunities. Any new school, academy or other providers will be expected to be judged ‘outstanding’ within three years of joining the City Corporation’s education portfolio.**

Prioritised Actions:

- a) Implement an agreed governance and accountability framework.
- b) Implement systems and structures that enable the City schools to become world-class in education.
- c) Organise school clustering arrangements by geographical location.
- d) Work with the Guildhall School of Music & Drama and other higher education providers to secure excellent provision and pathways for students at the City schools.

- 3. We will ensure that young Londoners in the City’s schools and beyond have access to the information, advice and experiences that will help them progress into fulfilling careers.**

Prioritised Actions:

- a) Work-related learning and work interactions.
- b) Access to quality and reliable careers advice.
- c) Using destination data to improve outcomes for young people.

## **Strategic Objective 1**

**We will ensure that the City Corporation's outstanding cultural and historical resources enrich the creative experience of London's learners.**

### Supporting the City Corporation's education vision

The City of London is unique in being home to such a wide range of high-quality cultural venues within such a small and historically significant geographical area. This provides a powerful opportunity to make a real impact on the lives of learners, not only those living in or visiting the City, but also people across London and beyond through outreach programmes, online resources and our inspiring green spaces. By maximising access to our cultural venues and bringing together their internationally important collections and expertise, we can help create engaged, active and creative citizens of the future who wish to make London a better place to live.

### Context

The City Corporation supports 19 diverse cultural venues, including the Museum of London, Barbican, Guildhall Art Gallery, Guildhall School of Music & Drama, the Monument, London Metropolitan Archives, and five public libraries, including three of regional importance. Beyond the City, it also supports other inspiring destinations for learning such as Tower Bridge, Keats House, Hampstead Heath and Epping Forest. Collectively, our venues represent a remarkable educational resource that can enrich the learning of children and adults, whether in families, early years settings, schools, universities or colleges.

In 2014/15 the venues' educational programmes engaged more than 10,000 children aged under five, 60,000 people in family groups, 170,000 school pupils, 23,500 adult learners and 2,300 higher education students. Together, the venues: provide safe, supportive environments for families and intergenerational groups to learn together; contribute to attainment and creativity across the full spectrum of the National Curriculum at all key stages; and equip young people with the motivation, skills, knowledge and confidence to move into further study or employment.

Through the City Corporation's Learning and Engagement Forum, its cultural venues and partners are now working together to develop a number of educational initiatives that are helping to lay the foundation for even closer collaboration in the future. This collaborative approach has already led to meaningful activity which no one organisation could have

developed alone, and is an active demonstration of the rich potential of the proposed Cultural Hub to make a major contribution to cultural education in London and nationally.

### Prioritised Actions

#### **a) Maximise access to the City Corporation's cultural venues by London's pupils through a school visits fund.**

Schools, especially those in disadvantaged areas and the outer boroughs, face a number of financial barriers to visiting the cultural venues supported by the City Corporation, including the cost of transport, staff cover and admission/session fees. Established in November 2015, our school visits fund ([www.cityschoolvisitsfund.org.uk](http://www.cityschoolvisitsfund.org.uk)) offers schools with at least 30% of students in receipt of Pupil Premium, who have not visited their chosen venue in the last three years, with grants of up to £300 to help with the cost of visiting any of our venues. The fund is managed by the Museum of London.

### Success Criteria

- i. At least 100 schools per year use the fund.
- ii. 100% of schools using the school visits fund have not visited their chosen venue in the last three years.
- iii. 75% of teachers say that they are likely to take a group to the venue again.

#### **b) Provide further opportunities for the City Corporation's cultural venues to work together to offer innovative learning programmes and resources that benefit learners across London and beyond.**

The Learning and Engagement Forum will continue to initiate and lead a number of learning projects by building on collaborations in 2015 such as:

- Young City Poets – a project in partnership with, and funded by, the National Literacy Trust to develop learning resources and teacher training programmes inspired by our cultural venues to develop literacy skills in primary and secondary schools. We hope that this will become a model for other cultural venues throughout London.
- City Stories – a day of creative activities for the City Corporation's sponsored/co-sponsored academies in Hackney, Islington and Southwark, delivered by a range of venues at the Museum of London and Barbican, engaging pupils who rarely or never visit the City to learn from its rich heritage.

- Celebrating the City Festival – a weekend of inspiring poetry, craft, music, drama, storytelling and other activities for children and families, at the Museum of London, delivered by the London Symphony Orchestra, Barbican, Barbican Library, Tower Bridge, London Metropolitan Archives, the City of London’s Open Spaces Department, and other venues.

Particular priorities are:

- Hard Education – a programme of in-school performances and workshops, teacher training and online resources, led by the London Metropolitan Archives, Museum of London and Barbican, to help secondary schools tackle challenging issues such as homophobia, sexism and substance abuse.
- A new interactive website for schools and the general public to mark the 350th anniversary, in 2016, of the Great Fire of London of 1666 that will draw on the Museum of London and London Metropolitan Archives’ remarkable collections relating to this iconic City of London event. The launch of this website will also complement and help enhance the major Great Fire of London event organised by the creative company Artichoke in September 2016, bringing new audiences and visitors to the City for the first time.
- The Shakespeare Weekender – a multi-activity, two-day, family event at the Barbican in March 2016, curated and delivered in partnership with the Museum of London and the Royal Shakespeare Company.
- A major headteachers’ event at the Barbican and Museum of London in 2016 to celebrate the work the City Corporation is doing to support education across London, promote a City of London Cultural Education Partnership, and launch the Great Fire website.
- An initiative engaging young people with the variety of STEM subjects and careers across our venues, led by the City of London’s Open Spaces Department and Tower Bridge, in celebration of British Science Week in March 2016.

#### Success Criteria

- 90% of participating teachers and pupils report that the Hard Education programme had a positive impact on their school and on attitudes and behaviours.
- The new Great Fire website becomes the recognised ‘go to’ website for the subject and receives at least two million page views in the first year after launch.

- iii. The profile of our learning work is raised through the headteachers' event, resulting in increased participation at City cultural venues.
- iv. 25% of people attending the Celebrating the City Festival and Shakespeare Weekender events are first-time visitors to the host venues.
- v. The City Corporation's investment in learning initiatives enables at least the same level of funding to be secured from other sources.

**c) Establish a City of London Cultural Education Partnership.**

Collectively, our venues represent the full scope of cultural education and are ideally placed to deliver Darren Henley's vision as set out in his 2013 report, *Cultural Education: A summary of programmes and opportunities*:

'...all children can and should benefit from receiving a wide-ranging, adventurous and creative cultural education. For many young people, cultural activities form a vital part of their everyday lives. These activities are academically, physically and socially enriching, whether they take place in-school or out-of-school.'

The report of the Warwick Commission on the future of cultural value, *Enriching Britain: Culture, Creativity and Growth* (2015), also highlights the success of the creative and cultural industries sector in creating jobs, economic investment and profile.

In October 2015, Arts Council England launched its Cultural Education Challenge and announced the creation of 150 cultural education partnerships across the country. These bring local authorities, schools, universities and cultural venues together to facilitate cultural learning. Together with the work that is taking place to realise the vision of the City to become a Cultural Hub, makes it an ideal time to work with Arts Council England and A New Direction, the bridge organisation for London, to formally establish a City of London Cultural Education Partnership.

**Success Criteria**

- i. A City of London Cultural Education Partnership, including the City schools, is established by 2018.
- ii. This Partnership is seen as a key strand of the Cultural Hub.
- iii. The City of London Cultural Education Partnership achieves national recognition as a model partnership of museums, public libraries, archives, cinemas, galleries, performing arts venues, historic buildings, green spaces, conservatoires and local



authorities working together to provide access to high-quality cultural experiences for learners through a single destination.

- iv. The creation of the Partnership results in the City Corporation's education work benefitting a greater number and diversity of learners across London.

**d) Promote the national STEM education agenda through working in partnership across our venues.**

- Investigate opportunities to support and enhance STEM education for schools in London at our wide range of cultural venues, celebrating the breadth of education and stimulus provided.
- Support the British Science Association's British Science Week activities by providing a range of learning opportunities across our venues.
- Promote the contribution that our cultural venues make to STEM education, to schools and the public.
- Actively encourage and support girls and young people in under-represented groups wishing to pursue a science-based career.
- Provide insights into applied science in the workplace across our venues.

Success Criteria

- i. 90% of teachers attending a British Science Week activity at one of our venues report learning something new about STEM subjects in a cultural setting.
- ii. The profile of our work on STEM learning is raised through the headteachers' conference, resulting in greater participation in STEM education at our venues.

Wider Influence

The City Corporation's cultural education offer currently benefits a huge number of learners of all ages and abilities in the City and across London. By building on this work through the priorities outlined above, we can reach even more people and have a greater impact on their lives. By providing access to our collections and expertise online – for example, through the Great Fire website and technologies such as webinars and live streaming – we can also reach out nationally and internationally.

## **Strategic Objective 2**

**We will ensure that all existing education providers are deemed ‘outstanding’ within three years and that there is continued development of excellent further, adult and higher education opportunities. Any new school, academy or other providers will be expected to be judged ‘outstanding’ within three years of joining the City Corporation’s education portfolio.**

### Supporting the City Corporation’s Education Vision

In its pursuit of educational excellence, the City Corporation has drawn together the schools it is responsible for as proprietor, sponsor or local authority, and has established a family of schools collectively known as ‘the City schools’.

These schools are engaged in establishing and sharing a collective ethos based on what will be known as the ‘Foundations of the City schools’. The City schools are committed to: developing partnerships; sharing best practice; learning from each other; and exploring opportunities to become more efficient through greater collaboration.

The City is committed to supporting the wider delivery of world-class education across London. We want to ensure that there is the capacity to sustain excellence, with the correct accountability procedures in place to support excellent educational standards, high levels of probity, and the development of schools and colleges that reflect the interests and values of the City Corporation.

### Context

At the date of publication, there are three independent schools, four academies and one maintained school within the City Corporation’s immediate education portfolio. One of the independent schools is located outside London and two of the academy schools are co-sponsored with other organisations. The majority of these schools operate in different local authorities. The schools have varying relationships with the City Corporation: with Sir John Cass’s Foundation Primary School, it is as the local authority; with the independent schools, it is as proprietor; and, with the academy schools, it is as sponsor or co-sponsor. Each school is proud of its association with the City Corporation.

The City Corporation provides bursary support to pupils at its independent schools and also to pupils at King Edward's School, Witley, and Christ's Hospital School. Additionally, it has the right to nominate governors to a number of other schools and educational bodies, including Emanuel School, part of the United Westminster Schools Foundation group of schools and Central Foundation Boys School.

The recommendations of the original Education Strategy 2013–2015 relating to the City schools, progress against those recommendations, and remaining challenges are outlined below:

- **Recommendation 1 – Develop a framework for overseeing the City's education offering.**

The Education Board was formed with agreed terms of reference and has provided resources to support the Education Strategy 2013–2015. A further rationalisation of accountability and scrutiny frameworks, particularly those relating to sole-sponsored academies, is now required.

- **Recommendation 2 – Encourage the City schools to work together as a family with a shared ethos and commitment to excellence.**

By establishing a Headteachers' Forum and a Chairmen of Governors' Forum, the City Corporation has increased information sharing and accountability. In addition, the work of the Education Unit has enabled the City schools to increase the sharing of best practice, partnership working, and school-to-school support. Activities include a programme of A-Level subject workshops, governor training, and termly Directors of Sixth Form meetings. This work needs to be developed in the coming years.

- **Recommendation 3 – Review the City's expenditure across its educational portfolio to ensure that it is directed to the City's objectives and fairly distributed; and Recommendation 5 – Clarify the relationship between the City of London and the schools associated with it, recognising the historic links that exist between them.**

The Education Board reviewed the financing, resourcing, governance and monitoring of the City academies and identified appropriate funding arrangements to provide long-term central education support for educational outreach.

- **Recommendation 4 – Identify educational best practice across London and beyond to benchmark and improve the City school education offer.**

Through the Headteachers' Forum, practice has been shared and best practice discussed. This is a function of the Headteachers' Forum and more formal scrutiny structures will be introduced during the academic year 2015/16.

### Prioritised Actions

#### **a) Implement an agreed governance and accountability framework.**

##### Success Criteria

- i. A single Multi-Academy Trust (MAT) established which assumes the scrutiny and accountability role for the City Corporation's sole-sponsored academies.
- ii. The executive functions of the MAT are identified, and posts recruited to, enabling the MAT to fulfil its statutory and legal responsibilities.
- iii. All providers support the City Corporation's quality assurance and accountability framework.
- iv. All providers are 'outstanding' within three years.

#### **b) Implement systems and structures that enable the City schools to become world-class in education.**

##### Success Criteria

- i. The Headteachers' Forum (the Forum) becomes a central vehicle for driving the sharing of practice, the consideration of new ideas, and the establishment of common approaches.
- ii. Leadership and support for the Forum is secured.
- iii. National and international educational best practice is regularly considered.
- iv. The Forum fulfils the reporting, consultative and proposal-forming functions on behalf of the Education Board.

**c) Organise school clustering arrangements by geographical location.**

Success Criteria

- i. Establish three clusters in London around the City Corporation's existing academies: the South, East, and North clusters.
- ii. The clusters are cross-phase and involve at least one of the City Corporation's independent schools as a partner.
- iii. Ongoing improvement projects are established in each cluster.

**d) Work with the Guildhall School of Music & Drama and other higher education providers to secure excellent provision and pathways for students at the City schools.**

Success Criteria

- i. Further and higher education partners attend one identified Headteachers' Forum.
- ii. Partnerships with the Guildhall School and other institutions are established, with lead schools identified.
- iii. Projects are implemented with positive outcomes.

Wider Influence

The City Corporation will be responsive to and influence the changing education landscape, welcoming appropriate opportunities to expand judiciously its education portfolio and extend educational opportunities. The City Corporation will also work in partnership with neighbouring boroughs, businesses, livery companies and interested parties to realise excellent educational opportunities.

## Strategic Objective 3

**We will ensure that young Londoners in the City's schools and beyond have access to the information, advice and experiences that will help them into fulfilling careers.**

### Supporting the City Corporation's Educational Vision

The City Corporation is committed to providing opportunities for young people in the City of London and neighbouring boroughs to experience the world of work and increase their chances of getting a job. Our focus will be on providing opportunities within the City schools, but will also benefit other schools in our neighbouring boroughs and wider London.

### Context

The youth unemployment rate (for 16- to 24-year-olds) in London stands at 18.4%, significantly higher than the national average (15%).<sup>1</sup> Despite young Londoners gaining better-than-average GCSEs they are more likely to be unemployed than young people in the rest of England, regardless of their qualification levels.<sup>2</sup> Recent research suggests that this is due to the characteristics of young people in London, with high levels of poverty and disadvantage and the intense competition for jobs in the capital making it harder for young people, particularly from disadvantaged backgrounds, to find work. We know that young people who have more contact with employers (for example, careers talks or work experience) while still at school are statistically less likely to become NEET<sup>3</sup> and earned on average 16% more than peers without such interactions.<sup>4</sup>

The City Corporation is committed to providing opportunities for young people to develop the skills that will help them into employment in the City and elsewhere and to achieve their goals. This commitment to young people extends beyond the City boundary into neighbouring boroughs and throughout London.

The City Corporation is also supportive of the London Ambitions Career Offer, commissioned by London Councils and the London Enterprise Panel, which acknowledges and sets out ways of addressing some of the challenges facing young people when making career choices.

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<sup>1</sup> Office for National Statistics (2015), Regional Labour Market, June 2015, [www.ons.gov.uk/ons/dcp171778\\_407073.pdf](http://www.ons.gov.uk/ons/dcp171778_407073.pdf)

<sup>2</sup> Census 2011

<sup>3</sup> NEET: Not in Education, Employment or Training

<sup>4</sup> Mann, A (2012) *It's Who You Meet: Why employer contacts at school make a difference to the employment prospects of young adults*, Education and Employers Taskforce

The role of the Education Board under this theme is to scrutinise the performance of the City academies in this area actively and to influence the City Corporation – and its partners – more widely to support the strategic objectives.

### Prioritised Actions

#### **a) Work-related learning and work interactions.**

We know that young people who have several interactions with the world of work while still at school are less likely to be NEET once they leave school. Providing opportunities for young people to have first-hand experiences with employers, in the City and elsewhere, from an early age, will help develop awareness of career pathways and future job prospects. It will also help young people to acquire the ‘soft skills’ and attributes necessary to succeed. The City Corporation supports a range of work-related learning activities and work interactions in schools across its neighbouring boroughs and also available to the City schools.

### Success criteria

- i. Working with the City academies, agree a programme of relevant work interactions for pupils, and access to opportunities to develop the ‘soft skills’ necessary for work, as part of an annual careers workplan, working towards ensuring that pupils have completed 100 hours of experience of the world of work by the time they are 16 years old, in line with the London Ambitions proposals.
- ii. Consider comparative, transparent reporting on the impact of career workplans on pupils.
- iii. Encourage the City schools to work together and share links and expertise to benefit all pupils.
- iv. Maintain an overview of the breadth of the City Corporation’s work-related activities offered to schools and young people as part of the broader London offer, ensuring that the City academies also benefit.

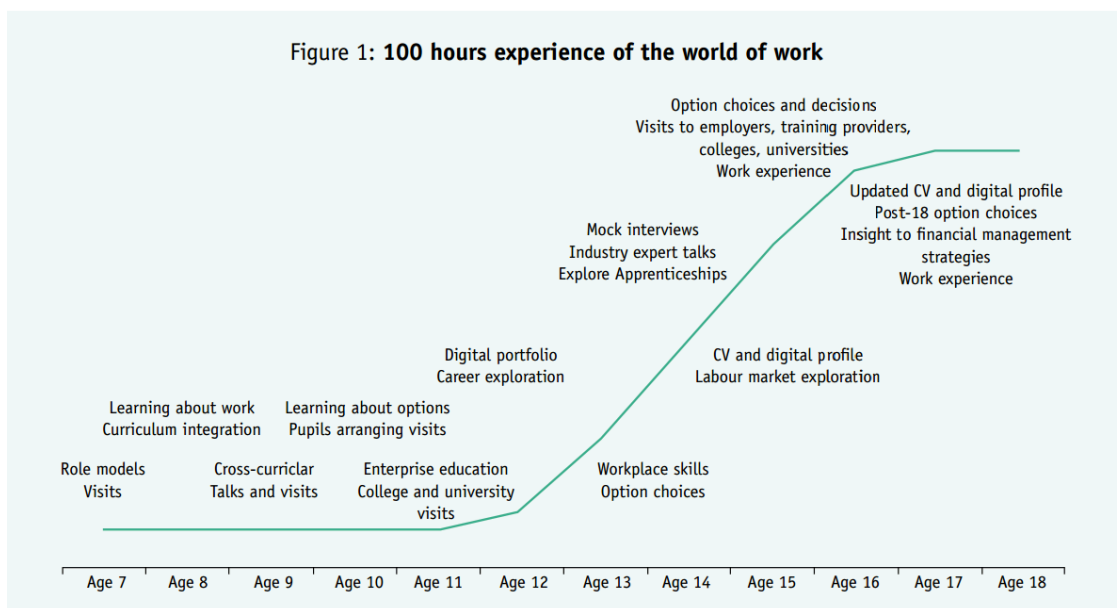


Figure 1: 100 hours experience of the world of work<sup>5</sup>

## b) Access to quality and reliable careers advice.

Young people deserve to have access to quality and reliable careers advice and information to ensure that their future working lives are not determined by chance and personal circumstances. In London in 2014 the proportion of young people in apprenticeships and jobs with training was half of the England average<sup>6</sup> and an alarming rate of young people dropped out of the qualifications they started post 16.<sup>7</sup> Our sponsorship/co-sponsorship of the City academies allows us to support the provision of quality careers advice in those institutions.

### Success criteria

- i. Work with the City academies to ensure that each has a published careers policy and careers curriculum and regularly scrutinise implementation and impact.
- ii. Ensure that each City academy has a governor on the governing body with responsibility to oversee this scrutiny.
- iii. Ensure that the City Corporation is participating actively in, and promoting, the London Ambitions Career Offer.
- iv. Ensure that students at City academies have access to up-to-date labour market information.

<sup>5</sup> London Enterprise Panel (2015) *London Ambitions: Shaping a successful careers offer for all young Londoners*, London Councils

<sup>6</sup> Hodgson, A and Spours, K (2014) *What is happening with 17+ Participation, Attainment and Progression in London*, London Councils

<sup>7</sup> Local Government Association, media release, 2 February 2015, [www.local.gov.uk/media-releases/-/journal\\_content/56/10180/6951000/NEWS](http://www.local.gov.uk/media-releases/-/journal_content/56/10180/6951000/NEWS)



### **c) Using destination data to improve outcomes for young people.**

Every young person deserves a good education and to achieve the best academic results that they can. However, young people also need to be prepared to succeed and achieve their goals after they leave school. Information on where pupils go when they leave school is now published on a regular basis and is helping us understand what pupils move on to after school. This allows us to have a useful conversation with schools, colleges and other partners about how we can improve destinations for young people, especially those not destined for university or at risk of dropping out. Our position as sponsor/co-sponsor of the City academies requires us to play a role in the future destinations of our pupils and how we can improve these outcomes.

#### Success criteria

- i. Work with the City academies to understand where pupils go after leaving school, particularly the sustained rather than immediate destination, and consider the annual data showing the performance of the City academies and other schools, working with the relevant institution to address any issues identified.
- ii. Further consider the different destinations of young people from the City academies – for example: university, further education, apprenticeships, employment, or NEET – to identify areas where additional support or opportunities may be required.

#### Wider influence

We are keen to foster success for all the schools we work with and the pupils they support. There is great potential to further develop partnership working between schools to establish mutually beneficial relationships and to share learning. We will work with the City academies and other schools to support and facilitate this. In addition, this theme does not sit in isolation from other programmes and activities already in place to support a successful transition from education to employment, including work with businesses and livery companies. Therefore, we will continue to work with colleagues, both within the City Corporation and outside, to ensure that our efforts align with and benefit from other activities underway or in development.

## Related City of London Corporation Strategies and websites:

- Department of Community and Children's Service's Business Plan:  
<http://www.cityoflondon.gov.uk/services/children-and-families/Documents/dccs-business-plan-2015-17.pdf>
- Early Years Strategy 2015-2018: <http://www.cityoflondon.gov.uk/services/children-and-families/Documents/early-years-strategy-2015-18.pdf>
- The Children and Young People's Plan:  
<http://www.cityoflondon.gov.uk/services/children-and-families/Documents/children-and-young-peoples-plan-full-strategy%2011%2009%2015.pdf>
- The Early Help Strategy: <http://www.cityoflondon.gov.uk/services/children-and-families/Documents/early-help-strategy.pdf>
- Adult Skills and Learning: <http://www.cityoflondon.gov.uk/services/education-learning/adult-learning/Pages/default.aspx>