



## The City Bridge Trust Committee

**Date:** THURSDAY, 26 MARCH 2020  
**Time:** 1.45 pm  
**Venue:** COMMITTEE ROOMS, 2ND FLOOR, WEST WING, GUILDHALL

**Members:** Dhruv Patel (Chairman)  
Alderman Alison Gowman (Deputy Chair)  
Karina Dostalova  
Simon Duckworth  
Marianne Fredericks  
Deputy Jamie Ingham Clark  
Alderman Susan Langley  
Deputy Edward Lord  
Jeremy Mayhew  
Wendy Mead  
Paul Martinelli  
Deputy Richard Regan  
Ian Seaton  
Deputy Dr Giles Shilson  
The Rt. Hon. The Lord Mayor (Ex-Officio Member)  
Jannat Hossain (Co-opted Member)  
William Hoyle (Co-opted Member)

**Next Meetings:** 13 May 2020 8 July 2020 17 September 2020

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**N.B. Part of this meeting may be subject to audio or visual recording**

**John Barradell**  
Town Clerk and Chief Executive

# **AGENDA**

## **Part 1 - Public Agenda**

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**  
To agree the minutes and non-public summary of the meeting held on 30 January 2020.  
**For Decision**  
(Pages 1 - 10)
4. **OUTSTANDING ACTIONS**  
Report of the Town Clerk  
**For Information**  
(Pages 11 - 12)
5. **PROGRESS REPORT**  
Report of the Chief Grants Officer and Director of City Bridge Trust (CGO)  
**For Information**  
(Pages 13 - 18)
6. **GRANTS BUDGET AND APPLICATIONS TODAY**  
Report of the CGO  
**For Information**  
(Pages 19 - 22)
7. **GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS**  
To consider the CGO's reports on grant recommendations as follows: -  
**For Decision**  
Summary of Bridging Divides (Pages 23 - 24)
  - a) Grants Recommended Between £100,001 and £250,000 (Pages 25 - 58)  
Report of the CGO
  - b) Grants Recommended of £250,000 and Above (Pages 59 - 82)  
Report of the CGO
  - c) Applications Ordinarily Approved Under Delegated Authority (Pages 83 - 94)  
Report of the CGO
8. **TO CONSIDER REPORTS OF THE CGO AS FOLLOWS: -**  
**For Decision/Information**
  - a) Applications Recommended for Rejection (Pages 95 - 100)
  - b) Funds Approved or Declined under Delegated Authority (Pages 101 - 104)

- c) Withdrawn and Lapsed Applications (Pages 105 - 108)
- d) Variations to Grants/Funds Awarded (Pages 109 - 110)
- e) Strategic Initiative Progress Report - GLA/Young Londoner's Fund (Pages 111 - 116)
- f) Reports on Learning Visits (Pages 117 - 122)
- g) City Bridge Trust Communications & Events Attended (Pages 123 - 136)

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

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

11. **EXCLUSION OF THE PUBLIC**

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

**For Decision**

**Part 2 - Non-Public Agenda**

12. **NON-PUBLIC MINUTES**

To agree the non-public minutes of the meeting held on 30 January 2020.

**For Decision**

(Pages 137 - 138)

13. **ADDITIONAL MONEY FOR BRIDGE HOUSE ESTATES ANCILLARY OBJECTS (TO FOLLOW)**

Report of the CGO

**For Information**

14. **PROGRESS REPORT ON THE MAYOR'S YOUNG LONDONERS FUND, YEAR 1**

Report of the CGO

**For Information**

(Pages 139 - 150)

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

Report of the CGO

**For Information**

(Pages 151 - 152)

16. **REPORT OF ACTION TAKEN**

Report of the Town Clerk

**For Information**

(Pages 153 - 156)

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

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

## THE CITY BRIDGE TRUST COMMITTEE

Thursday, 30 January 2020

Minutes of the meeting of The City Bridge Trust Committee held at Guildhall, EC2 on Thursday, 30 January 2020 at 1.45 pm

### Present

#### Members:

Alderman Alison Gowman (Deputy Chair) - In the Chair  
Karina Dostalova  
Deputy Jamie Ingham Clark  
Alderwoman Susan Langley  
Wendy Mead  
Paul Martinelli  
Deputy Dr Giles Shilson  
Jannat Hossain (Co-opted Member)  
William Hoyle (Co-opted Member)

#### Officers:

Joseph Anstee	- Town Clerk's Department
David Farnsworth	- Chief Grants Officer & Director of City Bridge Trust
Nathan Omane	- Chamberlain's Department
Anne Pietsch	- Comptroller and City Solicitor's Department
Fiona Rawes	- Town Clerk's Department
Scott Nixon	- Town Clerk's Department
Jenny Field	- The City Bridge Trust
Ciaran Rafferty	- The City Bridge Trust
Tim Wilson	- The City Bridge Trust
Lily Brandhorst	- The City Bridge Trust
Jemma Grieve Combes	- The City Bridge Trust
Kate Moralee	- The City Bridge Trust
Catherine Mahoney	- The City Bridge Trust
Geraldine Page	- The City Bridge Trust
Ruth Feder	- The City Bridge Trust
Samantha Grimmatt-Batt	- The City Bridge Trust
Edith Parker	- Chamberlain's Department
Kristina Drake	- Town Clerk's Department

#### 1. APOLOGIES

Apologies for absence were received from Dhruv Patel (Chairman), Marianne Fredericks, Deputy Edward Lord, Jeremy Mayhew and Ian Seaton.

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

The Deputy Chair, in the Chair, declared a standing interest by virtue of being a trustee of Trust for London, and advised that she had withdrawn from the delegated authority request in respect of the Museum of London Archaeology at Item 10b due to a conflict of interest.

3. **MINUTES**

**RESOLVED** – That the public minutes and non-public summary of the meeting held on 28 November 2019 be agreed as an accurate record.

Matters Arising

The Deputy Chair requested that officers follow up on the Digital Skills Strategy with the Corporate Strategy team.

4. **OUTSTANDING ACTIONS**

The Committee received the list of outstanding actions, noting those which were on the agenda or were scheduled for a future date or meeting.

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

5. **ANNUAL REVIEW OF THE COMMITTEE'S TERMS OF REFERENCE**

The Committee considered a report of the Town Clerk asking the Committee to review its terms of reference. In response to a query from a Member, the Deputy Chair advised that the Committee's quorum was in line with other Committees, also noting that decisions in respect of grants over £500,000 were referred to the Court of Common Council.

**RESOLVED** – That the terms of reference of the Committee be approved for submission to the Court as set out.

6. **PROGRESS REPORT**

The Committee received the regular progress report of the CGO and discussed the updates provided. The Committee had enjoyed a presentation and discussion with Lib Peck, Director of the Mayor of London's Violence Reduction Unit, at lunch prior to the meeting.

CBT's 25<sup>th</sup> Anniversary

A Member, noting that 2020 was also the 25<sup>th</sup> anniversary of the Disability Discrimination Act, asked whether there were any plans to commemorate this as part of the CBT anniversary. The CGO responded that there had been conversations on synergy between the two anniversaries and a prospective programme of work for 2020 and beyond.

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

7. **FINANCIAL POSITION OF CITY BRIDGE TRUST IN RESPECT OF THE PERIOD ENDED 31ST DECEMBER 2019**

The Committee received a report of the CGO setting out City Bridge Trust's financial position against budget for the period ended 31<sup>st</sup> December 2019.

In response to a query from a Member, the CGO advised the Committee on the difference in financial position following the shift to five-year grants under the Bridging Divides strategy and assured that organisations were not receiving less capital per annum as a result.

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

8. **GRANTS BUDGET AND APPLICATIONS TODAY**

The Committee received a report of the CGO summarising grant applications recommended for decision at the meeting, and those that had been considered since the last meeting under schemes of delegation.

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

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

a) **Grants of Between £100,001 and £250,000 for Approval**

The Committee considered a report of the CGO advising Members of funds recommended for approval for amounts between £100,000 and £250,000, including strategic initiatives. The CGO advised of a small amendment to the wording of the recommendation in respect of the Community Drugs and Alcohol Recovery Services and tabled an amended report for Members' consideration.

**RESOLVED** – That the City Bridge Trust Committee receive the report and approve the recommended amounts for the following applications:

1. Community Drug and Alcohol Recovery Services

**APPROVED** £110,550 (3 x £36,850) for a full-time Health and Wellbeing Outreach Worker (plus on-costs) to deliver mental health support services to isolated clients at a range of venues across the borough. Release of the grant in years 2 and 3 is conditional on evidence that CDARS' free reserves are expected to return to a level equivalent to 3 months total expenditure and clarification of the restricted reserve forecast.

2. Revolving Doors Agency

**APPROVED** £133,130 over 5 years (£31,000, £29,860, £27,000, £24,170, £21,100) to support the costs of further developing the London Regional User Forum.

3. St. Christopher's Hospice

**APPROVED** £165,250 over three years (£56,650; £54,400; £54,200) for the salary and associated costs of a f/t Project Manager to adapt and establish Compassionate Neighbours to support older, frail, socially isolated people in Bromley.

#### 4. St. Pancras Community Association

**APPROVED** £125,000 over five years (£25,000 x 5) for a Co-Ordinator (0.5FTE), activities, and associated running costs of the Golden Years programme.

#### 5. Step by Step

**APPROVED** £247,700 over five years (£49,060; £50,232; £49,332; £49,456; £49,620) towards the salary and running costs of dedicated weekly arts, crafts and music sessions for 48 disabled young people aged 4-18 years.

#### 6. Tempo Time Credits Ltd

**APPROVED** £202,000 over four years (£65,000; £60,500; £47,500; £29,000) towards the development of Time Credits networks in London, funding in each year conditional on a workplan being provided.

#### 7. Young Hammersmith and Fulham Foundation

**APPROVED** £200,832 over five years (£55,000; £50,000; £45,000; £30,000; £20,000) towards the salary costs of a f/t Business Development Manager and a f/t Consortium Development manager plus project-related costs.

#### 8. Ambition Aspire Achieve

**APPROVED** £127,000 over three years (£48,000; £43,000; £36,000) towards the salary costs of the Operations Manager, a new SEND Coordinator, sessional staff and project activities to develop and deliver services for young people with special educational needs or disabilities transitioning into adulthood.

#### 9. BeyondAutism

**APPROVED** £178,000 over five years (£46,000; £42,000; £42,000; £29,000; £19,000) for the salary and support costs of a full-time specialist vocational practitioner along with the production costs of an employment toolkit for a programme that will help maximise the workforce participation of young people with autistic spectrum disorders with multiple and complex needs.

#### 10. NOVA New Opportunities

**APPROVED** £150,000 over five years (£30,000 per annum) towards 14 hours per week of the current WCP Programme Manager and 17.5 hours per week of a new WCP Assistant. Release of each year's payments is subject to the receipt of satisfactory management accounts, until such time that free reserves reach a reasonable level.

#### 11. Roundabout

**APPROVED** £125,600 over five years (£19,400; £19,400; £22,800; £32,000; £32,000) towards the costs of the salaries of the co-Chief Executives over five years. Salaries for the first three years will be part-funded by a recently confirmed grant from the Henry Smith Charity, which runs for three years.

#### 12. Sutton Mencap

**APPROVED** £156,400 over 3 years (£52,100, £50,100, £54,200) towards a Digital Paths to Inclusion programme which combines the use of digital technology with increasing the voice of people with a learning disability in their local community.

#### 13. Grandparents Plus

**APPROVED** £211,900 over 5 years (£40,000; £41,000; £42,300; £43,600; £45,000) towards a FTE Senior Advice Worker (London) and associated costs.

#### 14. Disability Rights UK

**APPROVED** £175,000 over five years (5 x £35,000) towards the salaries, operating and management costs of the London element of the Independent Living Helpline and Members' Advice Line.

#### b) **Grants of £250,000 or Above for Approval**

The Committee considered a report of the CGO advising Members of funds recommended for approval for amounts of £250,000 or above. The CGO introduced each application to Members and outlined the proposals.

The CGO advised that officers wished to undertake further review of the application in respect of Sported Foundation. The Committee agreed to defer consideration of the application and agreed that the application could be considered under the Committee's delegated authority procedures.

Members of the Committee praised the high standard of applications and quality and variety of work going on, commending CBT and the organisations involved.

In response to a question from a Member, the CGO confirmed that CBT would be working in partnership with Trust for London on the Strengthening Voices, Realising Rights programme and would be closely involved with the work.

**RESOLVED** – That the City Bridge Trust Committee receive the report and approve the recommended amounts for the following applications:

15. Habinteg Housing Association Ltd

**APPROVED** £332,000 over three years (£121,000; £105,000; £106,00) for the costs of a programme to train, mentor and support disabled young Londoners to develop a career in inclusive design related work.

16. Spotted Foundation

**DEFERRED** – To be considered under the Committee's delegated authority procedures.

17. Wheels for Wellbeing

**APPROVED** £288,400 over 5 years (£58,320; £59,640; £55,100; £59,480; £55,860) towards the provision of fully accessible inclusive cycling opportunities in Lewisham, Croydon and Lambeth.

18. Bede House Association

**APPROVED** £260,000 over 5 years (£50,000, £51,000, £52,000, £53,000, £54,000) for the salary of the Starfish Domestic Violence Project Manager plus on-costs. The grant in years two to five is subject to the necessary balance in project costs being raised.

19. SignHealth

**APPROVED** £260,000 over 5 years (£50,000; £51,000; £52,000; £53,000; £54,000) towards the full-time salary of a Children and Families Support Worker, plus associated running costs, for a specialist service supporting Deaf women and their children who are escaping domestic abuse to rebuild their lives with increased resilience, independence and wellbeing.

20. Young Roots

**APPROVED** £288,500 over five years (£53,500; £58,000; £60,000; £61,500) for 1 FTE Croydon Caseworker along with support and on-costs associated with the service for young refugees and asylum seekers.

21. Waltham Forest Churches Night Shelter Ltd (WFCNS)

**APPROVED** £296,000 over five years (£58,550; £57,800; £58,800; £59,850; £61,000) for the salary and on-costs of employing a Full Time (35 hpw) CBT Therapist and associated project costs, with a contribution to core costs.

22. London Funders

**APPROVED** £300,000 over three years (3 x £100,000 towards the further development of the London's Giving movement.

23. Strengthening Voices, Realising Rights, Phase 2 – a joint initiative with Trust for London

**APPROVED** a grant of £400,000 over three years to Trust for London to establish a joint fund for Phase 2 of the Strengthening Voices, Realising Rights initiative to support work that tackles some of the root causes of poverty and disadvantage amongst Deaf and Disabled Londoners.

10. **TO CONSIDER REPORTS OF THE CGO AS FOLLOWS: -**

a) **Applications Recommended for Rejection**

The Committee considered a report of the CGO outlining a total of 28 grant applications that were recommended for rejection. The Committee noted that the application in respect of The Challenger Trust had been withdrawn and was therefore not recommended for rejection.

**RESOLVED** – That the Committee reject the grant applications listed in the accompanying schedule, except the application in respect of The Challenger Trust, which was withdrawn.

b) **Funds Approved or Declined Under Delegated Authority**

The Committee received a report of the CGO which advised Members of 22 expenditure items, totalling £793,760, which had been presented for approval under delegated authority to the CGO in consultation with the Chairman and Deputy Chair. The Committee noted that a past Chairman had approved the grant application in respect of Museum of London Archaeology in the room of the Deputy Chair.

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

c) **Withdrawn and Lapsed Applications**

The Committee received a report of the CGO which provided details of 9 applications which had been withdrawn or had lapsed.

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

d) **Variations to Grants/Funds Awarded**

The Committee received a report of the CGO which advised Members of a variation to 2 grants agreed by the CGO since the last meeting.

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

e) **Report on Learning Visits**

The Committee received a report of the CGO about two visits that had taken place. The Deputy Chair encouraged Members to attend visits where they could as they were useful.

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

f) **City Bridge Trust Communications and Events Attended**

The Committee received a report of the CGO providing Members with an update on the communications work of City Bridge Trust.

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

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

In response to a question from a Member on CBT policy on reserves, the CGO explained that officers always took the level of reserves in the context of the organisation and considered individual cases on their specifications. There was a procedure for assessing how appropriate an organisation's reserves were and applications were turned down where it was felt an organisation's reserves were excessive.

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

There was no other business.

13. **EXCLUSION OF THE PUBLIC**

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

<b>Item No.</b>	<b>Exempt Paragraphs</b>
14 - 15	3
16 - 17	-

14. **NON-PUBLIC MINUTES**

**RESOLVED** – That the non-public minutes of the meeting held on 28 November 2019 be agreed as an accurate record.

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

The Committee received a report of the CGO.

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

There was one question.

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

There was no other business.

**The meeting ended at 2.42 pm**

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Chair

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## The City Bridge Trust Committee – Outstanding Actions

Item	Date	Action	Officer responsible	To be completed/ progressed to next stage	Progress Update
1.	6 July 2018	<b>Outreach work with targeted Boroughs</b>	CBT Team	<b>May 2020</b>	London Funders has undertaken a mapping of cold spots for funders across London. A network meeting of funders, including CBT, to target two boroughs initially will take place on 17 <sup>th</sup> April 2020.
2.	28 Nov 2019	<b>Sport and Physical Activity</b>	CBT Team / Town Clerk	<b>March 2020</b>	Officers have been working with London Sport and others with a view to potential joint work.
3.	28 Nov 2019	<b>Work on Violent Crime</b>	CBT Team	<b>March 2020</b>	Update to be brought to Committee on CBT work with GLA i.e. Mayor's Young Londoners Fund. Mayor's Violence Reduction Unit to be invited to Committee
4.	28 Nov 2019	<b>Strategic Initiatives Update</b>	CBT Team	<b>May 2020</b>	A progress report on the London's Giving Strategic initiatives to be brought to Committee.
5.	30 Jan 2020	<b>Reflections</b>	CBT Team / Town Clerk	<b>March 2020</b>	Officers to consider the points raised about both the strategy meetings and regular committee meetings and consider bringing something back to Committee for further discussion

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<b>Committee:</b> City Bridge Trust (CBT)	<b>26<sup>th</sup> March 2020</b>
<b>Subject:</b> Progress Report	<b>Public</b>
<b>Report of:</b> Chief Grants Officer and Director of CBT (CGO)	<b>For Information</b>

## Summary

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

- a) COVID 19
- b) CBT Committee Dinner
- c) Funds usually awarded under delegated authority
- d) Community Infrastructure Levy
- e) CBT & supporting work tackling violence
- f) Cornerstone Fund
- g) Draft proposal for committee reflections approach

## Recommendation

Members are asked to:

- a) Note the report.

## Main Report

### COVID – 19

1. CBT are working closely with London Funders and its membership to consider the impact of COVID-19 in relation to London's community and voluntary sector.
2. London Funders has issued a statement which CBT have signed up to: this pledges support and flexibility with all grantees in these exceptional times. So far, 60 funders have also signed up <https://londonfunders.org.uk/about/covid-19>.
3. London Plus (the umbrella charity across Londons' voluntary sector infrastructure) is surveying voluntary organisations across London about actual/anticipate Covid-19 impacts on the sector and its clients/beneficiaries: results should be available early next week. London Funders and London Plus are working closely together to co-ordinate over the crisis. A further link has helpfully been made through the philanthropy strategy to the City Network

Group through its weekly bulletin (a group of around 150 City-based corporates).

4. CBT, alongside London Funders, recognise that civil society in London may experience financial hardship or other consequences as a result of the outbreak for a variety of reasons (and which the results of the London Plus survey will help to inform). To this end, CBT is working with London Funders and other Funders to create a pooled fund to support London's community & voluntary sector through this time – the detail of the focus and prioritisation is still being worked through but a request under urgency to allocate a substantial contribution from CBT is being considered.
5. CBT is following the Public Health England and Corporate guidance and in line with this has reviewed its business continuity plan: CBT is confident that should staff be required to work from home, core business could be sustained.

### **CBT Committee Dinner**

6. The CBT Committee dinner took place on Thursday 5<sup>th</sup> March. I would like to extend my personal thanks to all Members that attended and for engaging with the invited grantees and other partner organisations.
7. The £25 million uplift to the Bridging Divides grants budget was announced at the dinner. This will enable at least £25M to be distributed each year for the remaining duration of the strategy.

### **Funds usually awarded under delegated authority**

8. Your papers today (at Item 7c) include a cohort of grant recommendations which are for requests of between £50,000 - £100,000 and which would usually be approved under delegated authority. However, given the proximity to the financial year end, these have been presented for consideration today so that your decisions on all these requests can be made at the same time. This will allow us to draw a clear line on the total sum awarded this financial year.
9. It is also worth reminding Members that the thresholds for determining the levels of delegated authority which can be used are on the sum requested and not the sum recommended.

### **Community Infrastructure Levy**

10. The City of London Central Grants Unit (CGU) is co-located with the CBT team in order to facilitate consistency of approach and harmonise service standards across grant-making activities by the City Corporation (in its various capacities, including as trustee of a number of charities which form part of the Central Grant Programme). In May 2019 the Policy and Resources Committee approved that the Management of the City Community Infrastructure Levy (CIL) Neighbourhood Fund process should be managed by the CGU to ensure it is aligned with the City's existing grant allocation process.

11. The CGU has prepared the back-office functions for the CIL Neighbourhood Fund and recruited a CIL Neighbourhood Fund Programme Manager who started in post at the beginning of March. It is proposed that the CIL Neighbourhood Fund will launch on 1 April 2020 with applications accepted on a rolling basis. Information sessions will be scheduled for all members once the programme has launched.

### **CBT & supporting work tackling violence**

12. Your guest speaker at the pre-Committee lunch in January was Lib Peck, Director of the Violence Reduction Unit (VRU). The VRU was established by the Mayor of London in early 2019 (with initial funding of £6.8m) to implement the public health approach to talking youth violence following the success of that model in Glasgow. (There are a number of VRU's operating around the country.) As such, the VRU brings together specialists from health, police, local government, probation and community organisations to tackle violent crime and its causes. The goals of the Violence Reduction Unit are to:
- a) Stabilise and reduce violence across London
  - b) Find the major causes of violence and co-ordinate action across London to tackle them at scale, delivering a long-term reduction in crime and associated harms
  - c) Involve communities in the work of the VRU and build their capacity to deliver the best long-term solutions to reduce violence.
13. Prior to the VRU becoming operational the Mayor also created the Young Londoners Fund (YLF) – a £45m funding pot to help children and young people to fulfil their potential, particularly those at risk of getting caught up in crime. It is supporting over 200 projects providing a range of sporting, education, cultural and other activities.
14. The Trust's principal support to these initiatives has been both in cash and in kind. Regarding the latter several of your officers assisted the GLA with assessing applications to the YLF during two open rounds. Your Funding Director, Ciaran Rafferty, also sat on the panels at City Hall which made the final recommendations for funding. Ciaran also represents the Trust at meetings organised by the VRU where many of the key third sector partners are present to provide updates on their work.
15. In terms of financial support you will recall that you agreed, ratified by Court, a sum of £1M to provide a package of “wrap around” support to organisations funded by the YLF. This has included funding for the creation of local networks across London and for a variety of training programmes for organisations and their staff. Elsewhere in your papers today is a monitoring report on the GLA's network support programme to which you are contributing. There is also a report – provided by the GLA and in Non Public – of the first year of the Young Londoners Fund programme in its totality.
16. In February the Mayor announced further financial investment of £55.5m across the various agencies to supplement their work in the following ways:

- a) £25m of new money to build on the Young Londoners Fund – providing new funding for projects and programmes that provide positive opportunities for disadvantaged young people and help steer them away from crime
  - b) A big increase in funding for the VRU initiatives, with new moves including peer-mentoring programmes for young people in Pupil Referral Units to help tackle the consequences of school exclusions, and funding for community groups as part of a hyper-localised approach to violence reduction
  - c) Increased investment in programmes to tackle ‘county lines’ and to disrupt the drugs market in the capital, as well as funding to target persistent offenders and domestic abuse perpetrators as part of a joined-up approach to reducing offending.
17. At the time of writing your Funding Director Ciaran Rafferty is scheduled to attend a meeting at City Hall on 11<sup>th</sup> March to consider how the additional YLF funds might be used.
18. Whilst other funders have continued their usual grant-making to individual youth projects (and London Funders has played a significant role in co-ordinating this) your approach has been to focus on supporting staff and organisational development and networking, which has been very much welcomed. Your officers will continue to be fully engaged with the GLA, the VRU and London Funders to ensure that you are kept up to date of what is happening in this arena and that you are made aware of any particular issues where your assistance would make a significant difference.

### **Cornerstone Fund**

19. You may recall that funding decisions on the first round of the Cornerstone Fund were completed last autumn and there are 10 partnership/collaboration projects underway funded by CBT, National Lottery Community Fund, Trust for London, John Lyons Charity and the GLA (project summaries are available on request).
20. £870,000 remains in CBT’s Cornerstone Fund ‘pot’ and it was always the intention to run a second round, informed by learning from the first. To this end, we are running a workshop on 18th March 2pm – 4.30pm in the Basinghall Suite which will be co-facilitated by the Cornerstone Fund learning partner, Collaborate, London Funders and CBT. The audience is a mix of existing grantees and funders, together with potential new applicants and funders. The event will provide an opportunity to:
- a) Share learning so far from Round 1.
  - b) Hear how Round 1 worked for the funded collaborations and the funder alliance.
  - c) Work together to shape priorities for Round 2 and the practical next steps.

21. Just under 60 people have signed up for the event and we will provide an update for May's CBT Committee. We hope to be ready to launch Round 2 in June 2020.

**Draft proposal for committee reflections approach**

22. In Bridging Divides we committed to becoming a learning organisation. Your impact and learning strategy set out that to achieve this the Trust needs to develop its learning culture, creating time and space for learning, to improve how we work towards the vision of Bridging Divides.
23. A programme for better organisational learning is being developed by the Heads of Impact and Learning and it is helpful that Committee is leading the way from the outset.
24. During the Committee away half day in October 2019, seven Members contributed towards a group understanding of what a great learning organisation looks like. They described an organisation that makes time for learning, is reflective, encourages open minds, listens, supports and asks great questions, works as a team and has great conversations.
25. Building reflection into meetings, between meetings and during away half days with Committee and the CBT staff team, would help move towards this aspiration and would provide a model CBT's whole staff team and others in the Corporation could look to.
26. By introducing more regular opportunities for reflection, which are relevant, proportionate and focussed on improving Committee's impact, we hope to achieve the following benefits:
- a) More reflective and better decision making
  - b) The opportunity for Members to implement CBT's values of collaboration, inclusivity and representation.
  - c) Being able to continually assess "am I giving of my best? What could I do better? How may we collectively improve how the Committee works?"
  - d) Better communication between individual Committee Members and CBT team members leading to improved motivation.

***Suggested approach:***

27. CBT proposes the following simple, voluntary approach during the next three Committee Meetings, with a review at the end of this period to consider the benefits of the approach and whether or not to continue or to deepen it.
28. At the start of the meeting, the Chair may like to let the attendees know that he will be seeking feedback at the end of the meeting.
29. At the end of the meeting, the Chair invites any Committee Member or staff member to offer constructive feedback on the meeting, encouraging

responses from attendees (Members or staff members) who may have been quieter than others during the meeting.

30. The Chair will choose his own approach to asking for feedback but may like to consider asking:

- a) What one thing inspired me during the meeting and what will I do as a result?
- b) What one thing could we change at the next meeting to help us work better together?

31. In between Committee Meetings, the Chair is open to any other feedback on meetings or other discussions via email or phone in between meetings. Members may like to suggest:

- a) how all Members may create an environment which meets their personal goals and the goals for Committee
- b) how the Chair may support Members to be as effective as possible.

32. Annually, the Heads of Impact and Learning work with the Chair and Deputy Chair to deliver an annual survey for all members that seeks to capture:

- a) their motivations and how these can be met
- b) their current experience of being on the CBT Committee
- c) how this may be improved.

33. This could be delivered as part of the planned Members' skills audit survey or separately. There could also be a question added to the annual CBT staff team survey seeking team members' views on the effectiveness of the Committee.

34. The Heads of Impact and Learning analyse the surveys, discuss with the Chair and Deputy Chair and deliver recommendations. Either the Chair or Heads of Impact and Learning present back to the Committee and CBT staff team.

35. Committee half away days continue, informed by the end of Committee meeting and annual survey results and including sessions reflecting on the effectiveness of Committee in leading a learning organisation and how this may improve.

**David Farnsworth**

CGO

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Grants Budget and Applications today	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Jemma Grieve Combes, Head of Impact and Learning	

## Summary

This paper summarises grant applications recommended for decision at today's meeting, and those that have been considered since your last meeting under your schemes of delegation.

## Recommendations

Members are asked to:

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

## Main report

1. 41 Bridging Divides grant recommendations will be dealt with at the March meeting, including 25 grant recommendations for your decision today (see sections 7a & 7b of today's papers). 16 grants are to be noted as approved by delegated authority since your last meeting (section 8b of today's papers).

<b>Table 1: Today's recommendations</b>		
<b>Action</b>	<b>Nº</b>	<b>£</b>
Grant recommendations for today's decision	25	4,066,560
Approved by delegated authority (<£100,001)	16	967,380
<b>Sub total</b>	<b>41</b>	<b>5,033,940</b>

2. A further 35 applications are either recommended for rejection or have been withdrawn or lapsed (sections 8a & 8d of today's papers).

<b>Table 2: Today's rejections</b>	
<b>Action</b>	<b>Nº</b>
Recommended for rejection	22
Delegated small grant and eco audit rejections (to note)	5
Withdrawn (to note)	8
Lapsed (to note)	0
<b>Total</b>	<b>35</b>

3. There are 10 new variations to grant awards to report at today's meeting.
4. Table 3 shows the implications of today's recommendations against your 2019/20 grants budgets. If you approve all of the grants recommended today you will have spent £10,302,435 over your original indicative year 2 (2019/20) Bridging Divides budget allocation of £20m, once variations and designated funds are accounted for. The additional spend is a result of a significant increase in applications over the year and clearing the backlog created, together with an increase in the average size of a grant due to awarding 5-year funding. However, Members are reminded that a total sum of £100m over 5 years was approved to deliver Bridging Divides so there is flexibility in the annual allocation of these funds, whilst an additional £25m has now been approved, bringing the total sum available for Bridging Divides to £125m over five years.

5. Today's meeting deals only with Bridging Divides applications. For information Table 3 also shows spend against your Anniversary Infrastructure Programme of work (Cornerstone and Bridge Fund).

<b>Table 3: Overall spend against 2019/20 total grants budgets</b>						
	Bridging Divides		Cornerstone and Bridge Fund		Total	
<b>Budget</b>		£		£		£
2018/19 designated fund <sup>1</sup>		0		1,936,620		1,936,620
2018/19 overspend		(667,343)		0		(667,343)
2019/20 Budget		20,000,000		0		20,000,000
<b>Total budget</b>		<b>19,332,657</b>		<b>1,936,620</b>		<b>21,269,277</b>
Grants awarded in 2019/20	24,602,676		772,230		25,374,906	
Funds designated but not yet awarded <sup>2</sup>	201,010				201,010	
Less 2019/20 variations to date <sup>3</sup>	(134,357)		0		(134,357)	
Net grant commitments 2019/20 to date		24,669,329		772,230		25,441,559
Remaining budget 2019/20		<b>(5,336,672)</b>		<b>1,164,390</b>		<b>(4,172,282)</b>
<b>Today's meeting</b>						
Grant commitments		5,033,940		0		5,033,940
Non-grant commitments <sup>4</sup>		0		0		0
<b>Today's meeting total</b>		<b>5,033,940</b>		<b>0</b>		<b>5,033,940</b>
Less today's variations	(68,177)		0		(68,177)	
Remaining budget after today's meeting		<b>(10,302,435)</b>		<b>1,164,390</b>		<b>(9,138,045)</b>

Jemma Grieve Combes, Head of Impact and Learning

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1. Designated funds include £175,000 received from the GLA towards the Cornerstone programme
2. Remainder of £155,925 agreed at your March 2019 meeting towards the Responding to the Resilience Risk Pilot (£21,010 remaining grant spend. £55,925 non grant spend has been committed as agreed in March 2019. This was reflected in the March 2020 report) and £180k towards the core funding programme of work approved at your November 2019 meeting
3. Variations are write-backs and revocations to active grants that result in amounts being returned to the Trust. One exception was made under delegated authority to increase the amount awarded to the LMA by £378.
4. Non-grant spend represents expenditure such as management costs, evaluation activity or related research that is recommended for approval but will not be awarded as a grant to another charity. It comes from Central Risk budget.

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# Bridging Divides Eligibility Criteria

<ul style="list-style-type: none"> <li>• Registered charity</li> <li>• Registered Community Interest Company</li> <li>• Registered Charitable Incorporated Organisation</li> <li>• Registered charitable industrial and provident society or charitable Bencom</li> <li>• Charitable company</li> <li>• Exempt or excepted charity</li> </ul>	<ul style="list-style-type: none"> <li>• Revenue grants cannot amount to more than 50% of an organisation's turnover/income in any one year</li> <li>• Organisations cannot hold more than one grant at a time, except where the application is for: an eco-audit, an access audit, or is made under one of the Trust's special one-off programmes or is a strategic initiative</li> <li>• Grants must benefit inhabitants of Greater London</li> </ul>
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## Bridging Divides Programmes

### Connecting the Capital

- Capacity building support for civil society organisations
- Supporting Philanthropy
- Voice and leadership
- Place-based giving schemes
- Growing, greening and environmental projects
- Eco-Audits
- Arts, sports, health and/or well-being projects for Deaf and disabled people.
- Arts, sports, health and/or well-being projects for older people
- Access improvements to community buildings

### Positive Transitions

- Specialist support services working with children and young people
- Support for migrants and refugees to access mainstream services and widen participation in the community in which they live
- Specialist support services for Deaf and disabled people to increase choice and control in their lives
- Specialist support services for older people, including people with dementia, to increase choice and control in their lives
- Survivors of domestic and sexual abuse; modern day slavery; trafficking; or hate crime
- Ex-offenders leaving custody or serving community sentences
- Services which improve the accessibility and range of mental health support and services for people who are experiencing or at risk of homelessness or are vulnerably housed

### Advice and Support

- Provision of advice and support to disadvantaged individuals (from organisations with a recognised management qualification and/or advice quality standard)
- Food poverty (support for the infrastructure needed to support the distribution of food but not the direct purchase of food)

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Grants Recommended Between £100,001 - £250,000 for Approval	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Decision</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report advises members of funds recommended for approval for amounts between £100,001 and £250,000. This includes strategic initiatives. Assessment reports for all grants recommended for approval within this report are provided in Annex 1.

## Recommendation

Members are asked to:

- Receive this report and approve the recommended amounts

## Main Report

Member approval is requested for all applications between £100,001 and £250,000, summarised in this report.

The total amount of expenditure and number of items to be approved under are shown in Table 1.

Applications to be considered comprise of Bridging Divides applications.

Scott Nixon  
Head of Director's Office  
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## Index of Grant Recommendations (amount requested: £100,001 - £250,000)

No.	Ref	Grant Organisation	Original Amount Requested	Programme Area	Funding Manager	Location of Organisation	Amount recommended for approval	Grant duration (months)
<b><u>Bridging Divides</u></b>								
1	15654	Castlehaven Community Association	£143,325	Connecting the Capital	Jenny Field	Camden	£143,000	36
2	15642	Council of Somali Organisations	£155,057	Connecting the Capital	Tania Bronstein	Islington	£145,000	36
3	15695	St Margaret's House Settlement	£104,952	Connecting the Capital	Gilly Green	Tower Hamlets	£104,960	36
4	15674	St Paul's Church West Hackney	£105,000	Connecting the Capital	Sandra Davidson	Hackney	£105,000	36
5	15647	Young Camden Foundation	£135,000	Connecting the Capital	Tim Wilson	Camden	£135,000	36
6	15919	Alliance for Inclusive Education	£109,661	Positive Transitions	Sandra Jones	Lambeth	£109,700	24
7	15599	Aurora Foundation for People Abused in Childhood	£159,200	Positive Transitions	Gilly Green	Kingston	£28,400	12
8	15545	Generate Opportunities Ltd	£107,037	Positive Transitions	Samantha Grimmett-Batt	Wandsworth	£117,500	36
9	15672	School-Home Support	£108,000	Positive Transitions	Natalie Jordan	Newham	£108,500	36
10	15673	Spinal Injuries Association	£235,660	Positive Transitions	Kate Moralee	Outside London	£248,200	60
11	15571	Urban Partnership Group	£149,961	Positive Transitions	Julia Mirkin	Hammersmith & Fulham	£150,000	36
12	15578	Age UK Merton	£178,840	Advice and Support	Sandra Jones	Merton	£248,000	60

Page no	Ref	Grant Organisation	Original Amount Requested	Programme Area	Funding Manager	Location of Organisation	Amount recommended for approval	Grant duration (months)
<i>Total Bridging Divides (12 items)</i>			£1,691,693				£1,643,260	
<b>Grand Totals</b>			<b>£1,691,693</b>				<b>£1,643,260</b>	

**MEETING 26/03/2020**

**Ref: 15654**

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital**

**Castlehaven Community Association**

**Adv: Jenny Field**

**Base: Camden**

**Amount requested: £143,325.00**

**Benefit: Camden**

**Amount recommended: £143,000**

**The Applicant**

Established in 1987, Castlehaven Community Association (CCA) is a busy community centre, mainly serving Camden Town, an area amongst the 20% most deprived nationally for unemployment and poverty. It manages a four-acre campus, comprising a community centre, community nursery, Castlehaven Community Park and a multisports area. As well as services and activities for families and older people, together with its horticultural/environmental programme, it also runs two social enterprises which generate income for the charity. These are the Littlehaven Community Day Nursery and the All Weather Multisports Pitches.

**The Application**

CCA wishes to continue and build on a successful community gardening project, Greenworks, previously supported through HS2 funding which is due to end in July 2020. As stated earlier, it manages Castlehaven Community Park and has transformed part of the space into 1,300sqm of landscaped gardening space. This has enabled it to involve the local community of all ages to engage in a range of greening and growing activities which, as well as developing people's horticultural skills, also foster health and well-being and give local residents a sense of ownership of their local community facilities.

The aims of Greenworks are to:

- Help people live more healthily and sustainably
- Improve people's mental wellbeing
- Provide meaningful volunteering opportunities

CCA estimates it will be able to work with 1,500 over 3 years. Whilst these numbers seem ambitious, the Centre does attract large numbers (a recent Christmas event was attended by nearly 600 people). Since January 2019, the project has worked with over 1,000 people. It also has good links with other local projects, including Camden Society, Outside Project LGBTQI+ Community Centre, the Recovery College, Helen Bamber Foundation, Kentish Town Veg Box (which runs a monthly supper club at the Centre) and Kentish Town City Farm.

Funding from the Trust would support the salary of the Greenworks Co-ordinator who runs a programme of horticultural and wellness activities throughout the week; oversees the landscaping and planting of the Community Park (but not its maintenance which is managed by a separate post funded by LB Camden); and co-ordinates a team of active volunteers. In addition to the park, the project has turned a derelict building on the campus into a Horticulture Hub which provides a community greenhouse and workshop space. As well as growing plants, the project also grows organic food which is used for a variety of purposes, including for soup-making at a monthly gathering for older people; for activities in the community

nursery; for sale in its weekly shop and for the volunteers who have grown them to take home with them, of course. In the future, it is hoped to start jam, chutney-making and preserving classes, with the products also being sold in the shop.

### **The Recommendation**

CCA is a well-established, well-used and well-run community resource. Since the horticultural project started, the space has been transformed from something of a no-go area to a well-used community resource and funding is recommended.

***£143,000 over three years (£46,000; £46,500; £50,500) towards the full-time salary and associated running costs of the Greenworks Co-ordinator plus project running costs. Release of funds in Year 1 is conditional on a satisfactory budget for 2020-21 being provided.***

### **Funding History**

Meeting Date	Decision
04/09/2013	£109,400 (£35,600; £34,400; £39,400) towards the f/t Ageactivity Project Manager post and the cost of project evaluation. The grant is conditional on securing full match funding.

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

Your Growing Localities initiative underlined the important role that growing and greening projects can have in bringing communities together and their contribution to improved health and wealth being. CCA is an excellent example of this in action. The current Co-ordinator is a RHS qualified horticulturist with professional urban food-growing and therapeutic gardening experience. Additionally, Greenworks has the potential to provide CCA with some additional, welcome self-generated income over the next three years through the increased sale of produce.

### **Financial Information**

At the financial year-end 31<sup>st</sup> March 2019, CCA designated £370,000 of its unrestricted funds. This was utilised during 2020, principally to re-surface the football pitch it manages (c£400,000) plus improvements to the Community Centre itself. This explains the significant increase in expenditure for this year compared with the previous year and the budget for 2021. Whilst the deficit was largely planned, therefore, income also declined as a result of disappointing fundraising applications. A conservative budget has been set for 2021, in anticipation that fundraising will remain a challenge, although savings have been made in planned expenditure to mitigate this. Having grown two successful social enterprises in recent years, CCA plans to develop a further two over the next 5 years which will help to boost its income.

At the time of assessment, the budget for 2021 was still being finalised and the figures in the table below are CCA's current best estimate but may be subject to change. It is therefore recommended that the release of funds in Year 1 is conditional on a satisfactory budget for 2020-21 being provided.

Year end as at	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,250,404	1,003,166	932,190
- % of Income confirmed as at 26/02/2020	N/A	100%	35%
Expenditure	(1,005,768)	(1,508,741)	(883,000)
Total surplus/(deficit)	<b>244,636</b>	<b>(505,575)</b>	<b>49,190</b>
Split between:			
- Restricted surplus/(deficit)	21,990	(183,150)	(55,810)
- Unrestricted surplus/(deficit)	222,646	(322,425)	105,000
	<b>244,636</b>	<b>(505,575)</b>	<b>49,190</b>
Chairtable operating expenditure	683,763	980,501	498,000
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	452,577	124,786	173,976
No of months of operating expenditure	7.9	1.5	4.2
Reserves policy target	170,941	245,125	124,500
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	281,636	(120,339)	49,476

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MEETING 26/03/2020

Ref: 15642

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****Council of Somali Organisations****Adv: Tania Bronstein****Base: Islington****Amount requested: £155,057****Benefit: London-wide****Amount recommended: £145,000****The Applicant**

The Council for Somali Organisations (CSO) is a second-tier organisation set up to encourage collaboration between Somali community and voluntary organisations (SCVOs) and between the Somali community and policy and decision-making bodies. CSO supports over 100 member SCVOs to improve their operational effectiveness, and in working in more coordinated ways. CSO also represents the Somali community in voluntary sector networks and with statutory bodies such as the GLA, Metropolitan Police and central government departments.

**The Application**

CSO seeks a 3-year grant to support 45 SCVOs to gain knowledge and skills to influence decisions impacting on their service users. It plans to deliver nine 10-week development programmes focusing on health & wellbeing, the criminal justice system and economic empowerment. Each of the 5 SCOs in each programme would receive individual tuition and access shadowing opportunities to become acquainted with policy making and media platforms. CSO also plans to organise two annual gatherings and disseminate information on the themes above via its website.

**The Recommendation**

CSO has a new trustee board, a new CEO and seems skilled and equipped to adopt a more strategic approach to its work and its organisational development. Given the deteriorating reserves position, a condition is attached to the recommendation below.

***£145,000 over three years (£49,000; £48,000; £48,000) towards a 0.6FTE salary and associated costs of a project to support SCVOs in influencing decisions affecting Somalis in London. Release of the grant in years 2 and 3 is subject to management accounts evidencing progress in reducing the gap between free unrestricted reserves and the policy target.***

**Funding History**

Meeting Date	Decision
24/05/2016	£50,000 as final contribution towards the 2 part time posts below subject to signed, satisfactory accounts for the 17 months period to 31.03.2015
13/03/2014	£100,000 over two years (2 x £50,000) towards salary and associated running costs of a Business Development Manager (0.6 FTE) and a Research Development Officer (0.4FTE). The grant is conditional on appointing a Director with the requisite financial skills and is to be paid in monthly instalments.
17/02/2011	£100,000 over two years (2 x £50,000) towards salary and associated running costs of a Development Officer to strengthen SCVOs in London, on condition that the grant is receive is conditional on the appointment of a Director and is to be paid in monthly instalments.

## Background and detail of proposal

CSO developed from a series of seminars and feasibility studies funded by Trust for London (TFL), which together with City Bridge Trust have long recognised a need for a stronger voice for the Somali community, and both have been the organisation's main funders. CSO can claim credit for better collaboration between SCVOs, and for research and representation work that is making the community more visible to policy and decision-makers, and which has prompted improved responses to the complex and challenging issues facing Somalis. The community continues to fare much worse than most other migrant groups both socially and economically

CSO has faced teething problems, but there is evidence that these have been overcome. A new trustee board has been appointed for their skills, rather than simply as representatives of member SCVOs as previously. Under the leadership of a new CEO, the trustees have embarked on a process of reviewing priority needs in the community in the past few months. This proposal to build the skills of SCVOs to participate in local decisions on issues/areas identified as being critical to the Somali community, results from this process.

## Financial Information

The table below shows a year-on-year gap between the level of unrestricted funds and the target for free reserves. Developing new income sources to increase unrestricted funds is a priority for CSO. Current initiatives include establishing a specialist knowledge centre on new communities to generate income through research and consultations in partnership with BTEC and Evelyn Oldfield Unit, and offering paid for services to SCVOs such as fundraising support. These businesses are yet to prove potential, hence our recommendation. The organisation finished 2019 with a restricted balance of £38K.

Year end as at 31st March	2019	2020	2021
	Signed Accounts	Forecast	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	94,859	96,443	131,392
- % of Income confirmed as at 16.12.19	N/A	N/A	53%
Expenditure	(82,488)	(93,242)	(136,371)
Total surplus/(deficit)	<b>12,371</b>	<b>3,201</b>	<b>(4,979)</b>
Split between:			
- Restricted surplus/(deficit)	16,737	3,201	(6,979)
- Unrestricted surplus/(deficit)	(4,366)	0	2,000
	<b>12,371</b>	<b>3,201</b>	<b>(4,979)</b>
Running costs	82,488	93,242	136,371
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	13,413	13,413	15,913
No of months of operating expenditure	2.0	1.7	1.4
Reserves policy target	20,622	23,685	34,092
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(7,209)	(10,272)	(18,179)

MEETING: 26/03/2020

Ref: 15695

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****St Margaret's House Settlement****Adv: Gilly Green****Base: Tower Hamlets****Amount requested: £104,952.00****Benefit: Tower Hamlets****Amount recommended: £104,960****The Applicant**

St Margaret's House (SMH) is a long-established charity which aims to promote positive social change by creating opportunities for people to come together and play a more active part in their east London community – especially in Tower Hamlets. It welcomes over 3000 people every week to take part in activities – often led by local people – including crafts, music, yoga and enjoying a healthy meal through its café.

**The Application**

Disabled adults from the Bangladeshi community often have few opportunities outside the home for socialising, skills development and confidence building. In March 2019 SMH worked with one of its tenant organisations Bangladeshi Parents and Carers Association to pilot to Ghyama Arts' (Awesome Arts) a programme run in conjunction with the Central School of Speech and Drama providing regular arts and dance activity to disabled adults at BPCA's Day Centre. The programme delivered to adults with multiple disabilities, including those with Down's Syndrome, Congenital Cerebral Palsy and moderate learning disabilities. Some participants were single word communicators. The activities delivered real benefits including increased confidence, increased verbal communication and a stronger sense of independence. Working together BCPA and SMH now wish to extend the programme to deliver a wider arts and drama programme by working with three community-based arts organisations, all of whom have experience of working with disabled people. The application over three years builds on the pilot and extends the range of activities to include film making, circus skills and public celebrations within the Centre and the wider community. Funding is requested to provide a Project Coordinator to oversee the project, programme costs and those of the external organisations, as well as a contribution to management support, core costs and training. BCPA and SMH are both contributing staff time in kind to a value of just over £50,000 over three years.

**The Recommendation**

This project meets your objectives by increasing access to the arts for disabled people and thereby promoting greater autonomy and independence. Whilst working with relatively small numbers of people, it aims to bring professional artists to work with those who are often highly marginalised. As such it has at its core a commitment to inclusion. A grant is recommended as follows:

***A grant of £104,960 over three years (£36,340; £34,380; £34,240) towards the salary, running and project management costs of the arts programme for disabled adults.***

**Funding History**

Meeting Date	Decision
26/09/2019	Declined as it was too soon after an earlier access audit grant was awarded

## Background and detail of proposal

Each year of the project will be divided into three terms and have two three-hour sessions per week for up to 25 adults. Term one will focus on theatre skills led by Spare Tyre Theatre Co, term two on film making with Chocolate Films and term three will teach circus skills led by the National Centre for Circus Arts. There will be three public celebrations a year shared with the wider day centre membership and parents/carers and the local Tower Hamlets community. Many participants require one to one support for these types of activities and so numbers of service users are low. The partnership between SHA and BCPA adds value with SHA responsible for day to day planning, management and evaluation of the project and BCPA bringing experience of the service user group and cultural and language support to the visiting organisations. The experience of service users will be captured through video diary, feedback from those who are able and observation of changes in non-verbal service users from key day centre staff.

## Financial Information

St Margaret's House generates most of income through rents from around 30 tenant community groups on its site. It raises some funding from charitable trusts, usually for specific projects either that it runs itself or such as in this case, in partnership with a tenant organisation. The level of confirmed income for 2021 is low as SMH has only included income for the first three months of the year in line with tenancy notice periods. Last year the organisation took a decision to begin a fundraising appeal to build a fully accessible new arts and wellbeing centre on its site. It designated some of its unrestricted reserves for this purpose. SMH is currently operating below its reserves policy, although in 2019 Trustees revised downwards the level of reserve required although going forwards the policy remains at 3 months. SMH has ended the last two years with planned deficits but will end 20/21 with a small operating surplus. Going forwards SMH expects to generate annual surpluses and build its free reserves. It will do this through a 3% rent rise for tenants, along with price rises for its charges to its hall, chapel and other spaces. Despite not meeting its reserves policy and a low level of free reserves, the organisation has confirmed that the designated funds could be made available in the case of any unexpected shortfall.

Year end as at MARCH 31st	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,079,006	1,059,505	1,937,301
- % of Income confirmed as at 23 January 2021	N/A	77%	20%
Expenditure	(1,125,766)	(1,101,025)	(1,460,079)
Total surplus/(deficit)	<b>(46,760)</b>	<b>(41,520)</b>	<b>477,222</b>
Split between:			
- Restricted surplus/(deficit)	5,389	3,448	500
Designated funds	0	(26,701)	475,000
- Unrestricted surplus/(deficit)	(52,149)	(18,267)	1,722
	<b>(46,760)</b>	<b>(41,520)</b>	<b>477,222</b>
Operating Expenditure (unrestricted)	1,123,392	1,051,967	1,113,079
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	225,177	206,910	208,632
No of months of operating expenditure	2.4	2.4	2.2
Reserves policy target	231,000	262,994	278,269
No of months of operating expenditure	2.5	3.0	3.0
Free reserves over/(under) target	(5,823)	(56,084)	(69,637)

MEETING 26/03/2020

Ref: 15674

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****St Paul's Church West Hackney****Adv: Sandra Davidson****Base: Hackney****Amount requested: £105,000****Benefit: Hackney****Amount recommended: £105,000****The Applicant**

St Paul's Church West Hackney (SPCWH) is an Anglican parish church located between Stoke Newington and Dalston in the London Borough of Hackney. The church plays an important role in addressing the needs of marginalised groups. Long-standing partnerships with many local charities enable delivery of essential services onsite. The church runs an active community programme including projects of its own and those delivered by key stakeholders. 25+ groups regularly use the church hall and over 700 users access the facilities on a regular basis. Activities open to all include: an award-winning food poverty project; a unique, alternative, social club for older people featuring cabaret with a Chinese Elvis and a foul-mouthed vicar; singing groups and several young people's projects. Specialist projects include: a winter night shelter and year-round support and drop-in centre for homeless people; support and advice for those working in the sex industry; a luncheon club for African Caribbean people living with mental health problems; and support for those living with addiction.

**The Application**

SPCWH seeks funding towards 'The Posh Club' (TCP) providing a weekly social and entertainment club for adults 65+ who are experiencing or at risk of social isolation. The weekly four-hour event is styled as a tongue-in-cheek 'posh' 1940's afternoon tea with live performances, volunteer waiters in black tie, vintage crockery and decorations. SPCWH has been running the Posh Club in partnership with arts company Duckie since 2015. The club is successfully breaking down barriers between groups and promoting social connections, reducing isolation and improving health and wellbeing.

**The Recommendation**

Since 2015, SPWH and Duckie have run 60 TPC events, each full to capacity with waiting lists. Co-designed with a group of working-class elders in Crawley in 2013, TPC has been refined, and adapted. TCP has been delivered at over 250 events, mostly in London and the South East, for an average audience of 100 guest. TPC has proved very successful encouraging older people to make friends and become more physically active.

This proposal meets the criteria of you connecting the Capital programme and is recommended:

**£105,000 over 3 years (3x35,000) towards the Posh Club Co-Ordinator's salary (3.5dpw), Kitchen Manager's salary (1dpw) and towards associated running costs to deliver 30 x 4-hour TPC events per annum for older people.**

**Funding History**

Meeting Date	Decision
18/03/2016	£52,250 towards the redevelopment of the church hall to accessible standards to provide stair lifts and an accessible WC and shower/ wet room.
12/03/2015	Since submitting the application the organisation has decided to fund the cost of the audit from its own reserves in order to meet a planning application deadline. A bid for capital is expected in due course.

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

According to Age UK, there are over 2.4 million people 50+ living in London and more than 1 million people aged over 65. That number is expected to grow to 1.2million by 2024 - an increase of 22% of people aged 65+ in 10 years. Created to help older people get out and have fun, The Posh Club is an older peoples' service disguised as high tea at the Ritz. Specifically designed to reach older people struggling to stay active and maintain social contact by encouraging greater community interaction. Designed to appeal specifically to elders from traditional working-class backgrounds, most guests come from this demographic. Participants to TPC face a range of issues leading to feelings of loneliness and isolation. Loss of friends and family due to advancing age, mobility issues, or feelings of exclusion from community activities due to low income are common challenges. TPC uses high quality art and performance, hospitality, tongue-in-cheek glamour and an ongoing programme of assertive outreach to entice service users from their homes to the events. All events are heavily subsidised to ensure they are accessible to people on low incomes. Participants pay a nominal fee for entry for the event. Over 500 older people are expected to benefit p.a. The Posh Club Hackney's Co-ordinator works closely with Community Partner Network liaising with a number of organisations including, Action on Hearing Loss, Age UK East London, Claremont project, and Contact the Elderly to name a few. TPC also engage volunteers from a wide range of backgrounds, many of whom are often facing disadvantage or vulnerabilities of their own. Monitoring of the service after 3 months reportedly showed 85% of participants had made a new acquaintance /friend. TPC has also developed a series of satellite dance projects where guest meet outside of TPC and work with choreographers to devise and rehearse a performance, which they perform on stage to an audience of their peers.

The Posh Club secured funding from the Arts Council to run a longitudinal research project delivered in partnership with Queen Mary University, the results will be launched alongside a national campaign in May 2020.

### **Financial Information**

Forecast free reserves of £24,655 (budget 2020) are above the target reserves policy of three months' worth of expenditure. Forecast shown for 2019 does not include unrestricted income of £16,150 which has not yet materialised. The PCC of St Paul's is aware of the depleting unrestricted reserves and deficits. The charity plans to diversify their unrestricted income streams including revamping their planned giving programme to improve the current position.

Year end as at 31st December	2018	2019	2020
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	231,567	150,803	144,391
- % of Income confirmed as at 17/01/2020	N/A	N/A	56%
Expenditure	(241,520)	(133,370)	(135,376)
Endowment Gains/losses	(13,225)		
Total surplus/(deficit)	<b>(23,178)</b>	<b>17,433</b>	<b>9,015</b>
Split between:			
- Restricted surplus/(deficit)	(38,589)	42,450	29,720
- Unrestricted surplus/(deficit)	15,411	(25,017)	(20,705)
	<b>(23,178)</b>	<b>17,433</b>	<b>9,015</b>
Operating Expenditure (unrestricted)	147,454	102,101	104,135
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	96,411	71,394	50,689
No of months of operating expenditure	7.8	8.4	5.8
Reserves policy target	36,864	25,525	26,034
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	59,548	45,869	24,655

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MEETING 26/03/2020

Ref: 15647

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital**

Young Camden Foundation

Adv: Tim Wilson

Base: Camden

Amount requested: £135,000

Benefit: Camden

**Amount recommended: £135,000****The Applicant**

Established as a joint venture between the London Borough of Camden and John Lyons Charity in May 2017, the Young Camden Foundation (YCF) was registered as a charitable incorporated organisation in the same year. It is one of several Young People's Foundations formed across London since 2015 to develop and strengthen the provision of services for children and young people, particularly where that work is undertaken by smaller organisations. YCF acts as an infrastructure body for a membership of voluntary and community groups working with those aged 0-25 in the borough.

**The Application**

The charity works towards four goals: increasing long-term investment in the children and young people's sector in Camden; encouraging relevant collaboration between public, charitable and private sector partners concerned with children and young people in its beneficial area; ensuring that young people feel safe and have voice; and strengthening the capacity of its members to deliver high-quality services. YCF is well connected to all three sectors in its borough, with trustees and associate members (who act as senior advisers) from voluntary, private and public bodies.

**The Recommendation**

YCF's application is for its capacity building activities, and as such can be regarded as a request for core funding. Consistent with the awards made to other Young People's Foundations over the past few months, and in recognition of the organisation's strategic value as an infrastructure body, your officer recommends that the Trust waive its usual requirement that core funding be no more than 10% of turnover. This award would be on the same lines as those made under Bridging Divides to other Young People's Foundations, and YCF understands the Trust's rationale. The charity has applied for three years, and if it returns for a further two this would also be on the same tapered lines as awards made to other Young People's Foundations. Funding is advised as follows:

***£135,000 over three years (£50,000; £45,000; £40,000) as core funding to support the Young Camden Foundation's work for voluntary sector organisations working with children and young people.***

**Funding History**

In September 2015, City Bridge Trust Committee awarded £100,000 each to newly established Young People's Foundations in the Brent, Barnet and Harrow. This matched similar support from the John Lyon's Charity. Since then, other Young People's Foundations have been established across London with founding support from City Bridge Trust and John Lyon's Charity. In March 2018, Committee approved an award of £50,000 to the newly established Young Camden Foundation alongside

grants of the same value to Young People's Foundations in Brent, Harrow, Barnet, Westminster and Hammersmith & Fulham. In the last few months, these various Young People's Foundations have applied for continuation funding along the same lines as YCF's current proposal.

### Background and detail of proposal

Young People's Foundations were established during a period when local authority spending on youth services (which are typically considered to be 'discretionary') fell significantly. Several London boroughs have stopped funding for youth services entirely to protect core social services. Camden is a notable exception with the local authority still spending over £3m per annum, but this is in context of a borough with the fourth highest childhood poverty rate in London.

Compared with some other London Boroughs involved in the Young People's Foundation movement, Camden has both a strong private sector and good network of infrastructure bodies. YCF is clearly well-networked and has a model to generate more income from engagement with local businesses, local fundraising and contract fees.

### Financial Information

YCF's first set of accounts are for 2018. The table below therefore starts with examined accounts for the charity's second year of operations.

Over the three years, both turnover and expenditure are expected to increase by over 400%. This growth follows YCF's initial years of operation and reflects an organisation achieving its target scale. During this period free reserves are forecast to remain above the organisation's own target of 3 months and the charity notes that it plans to use surplus free reserves for a Small Grants programme in 2021. Whilst this is not reflected in the table below, it appears credible. It is also reasonable to assume that free reserves will come into line with the trustee target once the period of exponential growth passes.

Year end as at 31st March	2019	2020	2021
	Examined Accounts	Forecast	Budget
	£	£	
<b>Income &amp; expenditure:</b>			
Income	182,219	367,286	1,008,923
- % of Income confirmed as at 20th February	100%	92%	19%
Expenditure	(189,544)	(334,941)	(990,006)
Total surplus/(deficit)	<b>(7,325)</b>	<b>32,345</b>	<b>18,917</b>
Split between:			
- Restricted surplus/(deficit)	(36,805)	24,943	4,800
- Unrestricted surplus/(deficit)	29,480	7,402	14,117
	<b>(7,325)</b>	<b>32,345</b>	<b>18,917</b>
Operating expenditure (unrestricted funds)	121,770	180,124	209,806
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	99,262	106,664	120,781
No of months of operating expenditure	9.8	7.1	6.9
Reserves policy target	30,443	45,031	52,452
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	68,820	61,633	68,330

MEETING 26/03/2020

Ref: 15919

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Alliance for Inclusive Education****Adv: Sandra Jones****Base: Lambeth****Amount requested: £109,661****Benefit: London-wide****Amount recommended: £109,700****The Applicant**

Alliance for Inclusive Education (ALLFIE), a charity established in 1990, works on education issues, engaging mainstream stakeholders in the education sector and supporting young disabled people and their families to enable the young people to build their aspirations and meet their full potential. Activities include: regular production of Inclusion Now magazine; awareness briefings on 'the case for inclusive education' and the effects of education legislation on disabled people; supporting disabled pupils and students; working with parents of disabled students; facilitating the Inclusion Champions Consortium; working to raise awareness of inclusive education with Disabled Person-led Organisations (DPOs).

**The Application**

ALLFIE seeks continuation funding for 2 years for their Inclusion Champions project to strengthen the ability of DPOs to provide services and support to young disabled people and improve DPO voice, advocacy and representations skills to at least 20 DPOs across London. This will extend their existing community offer to young disabled people and their families. This will be achieved by employing a part time Inclusion Champion (2.5 days per week) and Policy Co-ordinator (0.5 days per week), and a proportion of the time of the existing the Director (5 hours per week) and the Communications Officer (1 day per month).

**The Recommendation**

ALLFIE has a solid track record of advancing educational opportunities for young disabled people through its different projects and works closely with other disability organisations such as Inclusion London to achieve its aims. Over the last three years, your grant has allowed ALLFIE to successfully deliver a project that has proven to increase the support to young disabled people and their families. A further two years' funding is advised as it will enable the organisation to continue to provide and expand this work:

***£109,700 over two further and final years (£54,400; £55,300) towards an Inclusion Champion post (2.5 days per week), the Policy Co-ordinator (0.5 days per week) and a proportion of the Director's time (5 hours per week) and the Communications Officer (1 day per month), as well as the costs of developing the e-hub, and training and capacity building costs.***

## Funding History

Meeting Date	Decision
20/03/2017	£166,300 over three years (£55,900; £55,700; £54,700) towards an Inclusion Champion post (2.5 days per week), the Policy Co-ordinator (0.5 days per week) and a proportion of the Director's time (5 hours per week) and the Communications Officer (1 day per month), plus related costs.
28/01/2016	Application declined as did not meet the criteria for support

## Background and detail of proposal

This project came out of work undertaken by ALLFIE with their New Voices group of disabled young people which identified the need for better links with empowered disabled adults and to have a better understanding of their rights. Prior to this project very few DPOs work with disabled children and young people and their families because traditionally it has been the preserve of the larger non user-led disability charities. This project has been able to train and strengthen DPOs to work with this cohort of people, with 20 DPOs becoming Inclusion Champions (for young people). This has achieved by identifying the capacity building needs of the DPOs, and by providing support and training, including training the trainers which has enabled the DPOs to cascade the learning. An e-hub has been established and is well used, and will be further developed.

## Financial Information

The charity has a successful track record of raising charitable funds to sustain activity levels and does not rely on any statutory funding. ALLFIE has a steady growth in income year on year due to donations and grant income. There will be a deficit on unrestricted reserves in 2020 whilst the organisation has been restructuring. This position will reverse for 2021, with a slight increase on the amount of unrestricted reserves, although it does show a decrease in the number of months of free reserves due to an increase in income and expenditure. The organisation has indicated that they will be increasing unrestricted reserves going forward as they have a donor who has promised funding for the next three years.

Year end as at 31 March	2019	2020	2021
	Independent Examination	Forecast	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	180,235	206,874	250,312
- % of Income confirmed as at 24/02/2020	n/a	n/a	76%
Expenditure	(171,157)	(178,715)	(243,007)
Total surplus/(deficit)	<b>9,078</b>	<b>28,159</b>	<b>7,305</b>
Split between:			
- Restricted surplus/(deficit)	11,641	43,206	4,006
- Unrestricted surplus/(deficit)	(2,563)	(15,047)	3,299
	<b>9,078</b>	<b>28,159</b>	<b>7,305</b>
Total expenditure	171,157	178,715	243,007
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	72,477	57,430	60,729
No of months of totalled expenditure	5.1	3.9	3.0
Reserves policy target	57,052	59,572	81,002
No of months of total expenditure	4.0	4.0	4.0
Free reserves over/(under) target	15,425	(2,142)	(20,273)

MEETING 26/03/2020

Ref: 15599

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Aurora Foundation for People Abused in Childhood****Adv: Gilly Green****Base: Kingston****Amount requested: £159,200****Benefit: London-wide****Amount recommended: £28,400****The Applicant**

The Aurora Foundation for People Abused in Childhood (Aurora) is a small registered charity based in Kingston, South West London is a counselling centre and part therapeutic community which aims to improve the mental wellbeing of adult women and men who have experienced abuse in childhood. Its main activities include long term counselling and group activities to address the emotional and psychological problems experienced by victims of childhood abuse.

**The Application**

The problems faced by victims of child abuse can be profound and long lasting, affecting mental and physical health and can result in post-traumatic stress disorder, anxiety, depression, self-harm and substance misuse. Given the nature of the abuse and the trauma that surrounds it, and the fact that many survivors do not come forward due to stigma and shame, accurate prevalence figures are difficult to obtain. However, a recent crime survey (2018) for England and Wales indicates that 1 in 4 adults were abused in some way as a child. Services for adult survivors can be hard to access and most clients find Aurora through an online search though a small proportion are signposted by other health providers such as GPs or NHS psychological services. Statutory services can rarely provide long term counselling. Most clients contribute financially towards their counselling, but this excludes those on low incomes. Aurora is the only service in South West London which offers long term counselling to this user group and evaluation of the service through evidence-based tools shows consistently good outcomes. Aurora is requesting funding over five years to subsidise the cost of long term, person-centred counselling for those unable to pay for the service. This will allow weekly counselling, delivered by specialist counsellors and group work where appropriate to be offered to a broader range of clients. The request includes counsellor and group facilitator costs, clinical supervision and management and premises charges.

**The Recommendation**

With limited resources Aurora has focused on ensuring a high-quality counselling service is available but unfortunately it has not been able to give priority to organisational stability. Despite generating around 30% of its income through fees and a further 20% through donations, its financial position remains fragile due to the level of grant funding currently confirmed for 2021. It is also insufficiently linked into local statutory services. Meeting Aurora's request to subsidise its counselling service over 5 years may not be the best way to achieve greater stability but a grant to fund the counselling short term together with support for organisational development would be very useful. Your officer therefore recommends covering the costs of psychotherapy for low income clients for one year, together with funding to support the development of a funding strategy and help to position the organisation more effectively within the health system. Depending on progress, the organisation could

subsequently be encouraged to return for follow on funding after the first year subject to the conditions below. A grant is recommended as follows:

***£28,400 made up of £18,400 over one year towards therapists' fees, clinical supervision, premises and management costs and £10,000 to develop a robust fundraising plan and develop better links with local statutory providers.***

## Funding History

None

## Background and detail of proposal

Despite the current challenges around access, the charity works with a diverse range of people and last year 42% of clients were from black and minority ethnic communities. Approximately 80% of clients are women. Monitoring reports against its three-year grant from MOPAC show positive changes for individuals in wellbeing and improved functioning. As well as one to one support Aurora also enables people to meet and connect to other survivors before and after therapy. It also organises social gatherings and outings, recognising that many survivors can experience isolation and loneliness, given their reluctance to disclose their experience even to close family and friends.

## Financial Information

Aurora generates approximately half its income from client fees and donations, and these have been at a consistent level for the last few years. Its last set of signed accounts (2019) showed low levels of unrestricted reserves but the position has improved considerably. The percentage of income confirmed for 2021 does not include client fees as these are not contractual but given the organisation has a waiting list, these are reasonably secure. The deficit on the restricted funds for 2021 will be covered by the unrestricted surplus. The calculation for the level of free unrestricted reserves for 2021 is based on total expenditure as Trustees are currently reviewing the reserves policy to clarify what level of funds should be held for what purpose. This is felt to present a more prudent approach and guards against a worst-case scenario. Applications to several charitable trusts are in the pipeline to fill the current funding gaps and with external support a more strategic approach to fundraising and partnership working will increase chance of the organisation becoming more sustainable in the future.

Year end as at 31 MARCH	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	85,407	105,386	100,576
- % of Income confirmed as at 12/02/20	N/A	90%	26%
Expenditure	(89,384)	(86,210)	(90,450)
Total surplus/(deficit)	<b>(3,977)</b>	<b>19,176</b>	<b>10,126</b>
Split between:			
- Restricted surplus/(deficit)	320	0	(9,874)
- Unrestricted surplus/(deficit)	(4,297)	19,176	20,000
	<b>(3,977)</b>	<b>19,176</b>	<b>10,126</b>
Operating Expenditure (unrestricted)	54,804	38,310	90,450
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	4,421	23,597	43,597
No of months of operating expenditure	1.0	7.4	5.8
Reserves policy target	13,701	9,577	22,612
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(9,280)	14,020	20,985

MEETING 26/03/2020

Ref: 15545

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Generate Opportunities Ltd****Adv: Samantha Grimmett-Batt****Base: Wandsworth****Benefit: Wandsworth****Amount requested: £107,037****(Revised request: £115,341)****Amount recommended: £117,500****The Applicant**

Generate Opportunities Ltd (GO) is a Wandsworth based charity founded by volunteers almost 50 years ago. It supports more than 150 people with a learning disability each week to develop independence, build community connections, and live their lives in the way they choose. Key workstreams include employment support, outreach relating to learning, lifestyle, and wellbeing, stand-alone health and wellbeing projects, social opportunities and youth services.

**The Application**

GO seeks funding for a project which supports people with a learning disability to run a "speaking up" forum and represent GO at local and national conferences, consultations and networking events. Participants will also influence key decision makers locally, quality check publications, projects and policies, and take part in specialist training. The project will be led by two part time co-ordinators, one with lived experience of a learning disability. The two roles will be equal but with different responsibilities, for example the person with lived experience will be crucial in recruiting and engaging other GO members to attend the forum, whilst the other co-ordinator might take on more administrative and finance functions. The exact division of labour, however, will depend of the skillsets of the individuals recruited.

**The Recommendation**

This project will support participants to have the confidence to express their views and participate meaningfully in their community, engaging with the decisions and choices which effect their lives. It will both influence change and allow members to feel truly heard, sometimes for the first time. The recommendation amount is higher than the request due to an error on the application form and because inflation had not been factored in. Funding is recommended:

***£117,500 over three years (£38,500, £39,000, £40,000) towards the salaries of two Generate Voices Co-ordinators (15HPW each, one Co-ordinator to have lived experience of a learning disability) and associated project running costs.***

**Funding History**

Meeting	Decision
31/10/2012	£90,000 over three years for the costs of the "Generate Growth" project.
28/04/2011	£70,000 over 2 years for a scheme supporting young people with learning difficulties into independent adulthood.

**Background and detail of proposal**

Forum activities will include monthly meetings with guest speakers and role models. The co-ordinator and speaking up participants will plan future agendas and decide which speakers and trainers to invite. They will also develop a plan to increase

understanding of governance and work towards joining the board of trustees. the group will make contact with rights campaigning organisations and engage with local networks. These activities will empower people with a learning disability to influence change and help to navigate and deconstruct barriers so that they can make a full contribution to both society and GO itself.

Members have informed the development of the project/proposal and participated in the assessment process itself. The charity is deeply and genuinely committed to being user led, and to modelling genuine engagement rather than tokenism. The charity has always involved members meaningfully in its activities and recent examples include supporting members to amplify their voices and utilise their lived experience expertise in a user led friendship group and with co-training and consultancy work. Your funding will build on this, allowing a more systematic approach which engages many more participants. It will also allow the charity to find ways to expand its consultative work, for example in commissioned services.

### **Financial Information**

The primary income source is various local authorities and the Department of Work & Pensions. Although predominantly statutory funding, the range of services, grants and contracts is diverse with some unrestricted funding being raised from individuals. The charity only operates funded services. GO constantly sources new income streams and responds proactively to changes. The predicted deficit on restricted funds in 2020 was due to a programme which the charity has traditionally subsidised from unrestricted funds when it is unable to raise full funding. Applications are pending to cover this deficit, but it will be transferred to unrestricted should the funds not be covered by outside sources. The deficit on both restricted funds and unrestricted funds in 2021 is due to a combination of an unexpected increase in the London Living Wage (which will not be covered by the local authority contracts), and some staff restructuring costs, the restricted deficit will be transferred to unrestricted if full funding is not found. The charity has recently undertaken a number of activities to improve, and support the development of, the good financial health of the charity. This has included outsourcing financial functions and training for the management team. Furthermore, additional potential sources of income (one contract and one grant) have been identified for y/e 2021, to offset the deficit.

Year end as at 31 March	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,598,091	1,626,404	1,620,019
- % of Income confirmed as at 11/02/2020	N/A	98%	83%
Expenditure	(1,516,027)	(1,609,875)	(1,632,432)
Total surplus/(deficit)	<b>82,064</b>	<b>16,529</b>	<b>(12,413)</b>
Split between:			
- Restricted surplus/(deficit)	0	(18,472)	(7,499)
- Unrestricted surplus/(deficit)	82,064	35,001	(4,914)
	<b>82,064</b>	<b>16,529</b>	<b>(12,413)</b>
Operating Expenditure (unrestricted)	1,506,041	1,448,760	1,456,312
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	503,639	538,640	526,227
No of months of operating expenditure	4.0	4.5	4.3
Reserves policy target	376,510	362,190	364,078
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	127,129	176,450	162,149

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MEETING 26/03/2020

Ref: 15672

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****School-Home Support****Adv: Natalie Jordan****Amount requested: £108,000****Base: Newham****Benefit: Lewisham****Amount recommended: £108,500****The Applicant**

School-Home Support (SHS) is a charitable company that aims to break intergenerational cycles of deprivation, low aspiration and inequality through targeted support for children, young people, and their families, in partnership with schools and other community services. The charity began in Tower Hamlets in 1984, and its work spread initially across East London. It now has national reach and delivers work in 5 Alternative Provision (AP)/Pupil Referral Unit (PRU) schools in Greater London. SHS takes a holistic approach to supporting young people, addressing issues that may affect a children's learning such as poverty, housing, and mental ill health. It provides direct one to one support, group work and support accessing specialist services, alongside additional support for families and schools. In 2019, SHS received a commendation from the Centre for Social Change for its work in education.

**The Application**

This application is to establish a new School-Home Support Practitioner role and associated costs in Wize-Up Academy in Lewisham, an AP school. The practitioner will manage a small case load of 18 young people per year with mental health issues, providing intensive, tailored, and holistic support. The aim is ultimately to support a young person to transition back into mainstream schooling, but many will require longer term support within the AP setting. Young people will be prioritised in partnership with the school for support based on their mental health needs and their need for support in reengaging with their education.

**The Recommendation**

Whilst your policy ordinarily excludes direct work in schools, it makes an exception for specific mental health work as it can enable the delivery of support to children and young people with mental health issues who are unlikely to be reached outside of a school setting. Whilst there is some statutory mental health support available for young people, take up of those services, availability and consistency can be low, whilst rates of developed mental health problems are higher for young people who are excluded from mainstream education. The role will support access to those services and build positive relationships between services and young people and their families. The practitioner will be better placed to provide consistency and a trusting relationship than those from institutions that may otherwise be mistrusted by young people who otherwise come from chaotic backgrounds. A small increase in funding is recommended to include inflation on the contribution to non-salary costs, and an annual contribution from Wize-Up has been pledged subject to confirmation of other funding such as your grant if you agree it:

***£108,500 over three years (£36,000; £36,200; £36,300) for the salary and associated costs of a School-Home Support Practitioner (37.5hpw, term time only) to support the positive transitions of young people with mental ill health in Alternative Provision. The release of funding is conditional on the provision***

**of a finalised Job Description for the role that includes specifications relating to experience of mental health work and any relevant qualifications.**

## Funding History

None.

## Background and detail of proposal

A 2018 report from the House of Commons Education Committee (*Forgotten children: alternative provision and the scandal of ever increasing exclusions*) details that an estimated one in two pupils in AP have social, emotional and mental health as their primary category of Special Educational Need, as opposed to one in fifty in the general population. Many children referred to PRUs and AP come from the most deprived backgrounds and chaotic homes.

This role will be SHS's first practitioner role with a dedicated focus on mental health, but its practitioners based in other AP schools in London already predominantly deal with mental health issues. One officer, based in Mayesbrook Academy, Dagenham, reported that 80% of the young people supported have mental health issues, including anxiety and trauma-induced psychoses.

## Financial Information

Funding is applied for over 3 years with the ambition that costs will be picked up by schools, AP or local authorities. SHS uses recognised tools for monitoring its impact, such as the Wellbeing Star, that will be used to evidence the benefit of its approach to providers. It has previously been successful in securing Department for Education Opportunity Area funding for its work in Blackpool and maintains a number of contracts with other schools. Whilst shrinking school budgets have resulted in some schools terminating contracts with SHS, it has been able to maintain a balance with new contracts.

Year end as at 31st August	2018	2019	2020
	Signed Accounts	Draft Accounts	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	2,328,326	2,089,205	2,468,529
- % of Income confirmed as at 03/02/2020	N/A	N/A	100%
Expenditure	(2,327,991)	(2,083,134)	(2,436,851)
Total surplus/(deficit)	<b>335</b>	<b>6,071</b>	<b>31,678</b>
Split between:			
- Restricted surplus/(deficit)	37,348	(19,069)	0
- Unrestricted surplus/(deficit)	(37,013)	25,140	31,678
	<b>335</b>	<b>6,071</b>	<b>31,678</b>
Operating Expenditure	870,348	877,152	872,844
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	165,165	161,873	193,551
No of months of operating expenditure	2.3	2.2	2.7
Reserves policy target	130,000	145,000	145,474
No of months of operating expenditure	1.8	2.0	2.0
Free reserves over/(under) target	35,165	16,873	48,077

MEETING 26/03/2020

Ref: 15673

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Spinal Injuries Association****Adv: Kate Moralee****Base: Outside London****Amount requested: £235,660****Benefit: London-wide****Amount recommended: £248,200****The Applicant**

Spinal Injuries Association (SIA) was founded in 1974 by Baroness Masham of Ilton, who became spinal cord injured in 1958. SIA is a National Charity that supports anyone affected by spinal cord injury. It offers a range of support including advice and advocacy; peer support; Nurse Specialist input; and telephone counselling. It uses evidence from the support it offers and feedback from its members/beneficiaries to campaign for better services and to influence policy. SIA is user led with a requirement being that 75% of trustees must be spinal cord injured.

**The Application**

SIA is seeking your support to employ a Peer Support Officer (PSO) and associated costs to provide support, advice, guidance and advocacy for people experiencing spinal cord injury in London. The peer support worker will provide inspiration, motivation, hope and real-life experience of adjusting to life after spinal cord injury to approximately 100 of the 600 people who are newly diagnosed every year.

**The Recommendation**

SIA is a user led organisation (staff and trustees) and is the national voice of people with spinal cord injuries and a leading source of expert guidance for healthcare and legal professionals. The PSO complements the work of clinicians and other health care professionals involved in a person's care. The PSO will work in partnership with a Nurse Specialist to visit patients in the London Spinal Cord Injury Centre in Stanmore, district hospitals, trauma centres and rehab clinics. The PSO has the greatest impact when supporting individuals from hospital/health care setting to home where the greatest challenge is moving from a safe environment to the unknown. Your practice is to award funding for maximum 1fte post, however the original request from SIA exceeded this. The original request has been revised to include on-costs and inflation and allocate the project running costs to CBT, with other staff costs allocated to other fundraised income.

***£248,200 over 5 years (£48,300; £49,000, £49,600, £50,300, £51,000) for a f/t Project Support Officer and associated running costs to provide support, advice and advocacy for people experiencing spinal cord injury in London.***

**Funding History**

Meeting Date	Decision
06/07/2018	Application declined due to organisation holding high level of free reserves.
22/09/2016	Application declined as was of a poor quality.
14/07/2016	Application withdrawn.

## Background and detail of proposal

Approximately 600 new people experience spinal cord injury every year in London and there are approximately 6,000 people currently living with the condition in London. There is only one SI centre in London (Stanmore) with 50% of those newly diagnosed receiving treatment and rehab at Stoke Mandeville.

SIA is the leading voice on spinal cord injury in the country. Its offer is a holistic service led by users for users, with a PSO in every region. The model offers support from a Spinal Cord Injury Specialist Nurse, a Peer Support Officer and access to an Advocacy team. The model is going through some change currently, with the aim of recruiting more Peer Volunteers to allow the PSO's to focus on building networks with other organisations, employers and medical staff and to offer more specialist and expert advice and support.

The PSO seeks to empower newly injured people to lead an independent life, offering emotional support providing reassurance and demonstrating that a fulfilled life is still possible. Leaving hospital and returning home can present many difficulties as well as being a scary time. For example one person told your officer of his own experience of his first night at home, where he had transferred from wheelchair to bed then realised the light was still on! This simple task presented a significant challenge for the person concerned – as he had never transferred from his own bed (soft sprung mattress) to his wheelchair before and was not able to do so. To solve the challenge, he had to throw his shoes at the light switch...successfully. Sharing these stories with people returning home enables them to understand that everyone experiences difficulties, however there is support to overcome them.

## Financial Information

SIA has benefited from funding of £890,000 from the October Club in 2019/20, with £600,000 of the reported unrestricted reserves designated for the specific purpose of expanding the Specialist Nurse Service, which it will spend over three years, 2019/20 to 2021/22. This "one off" fundraising activity explains the free reserves over target in 2019/20 and 2020/21. The increase in expenditure and associated unrestricted deficit is attributable to the expansion of the Specialist Nurse Service and funds raised through the October Club for this purpose.

Year end as at 31/3	2019 Signed Accounts £	2020 Forecast £	2021 Budget £
<b>Income &amp; expenditure:</b>			
Income	2,129,307	2,991,926	2,640,112
- % of Income confirmed as at 19/2/2020	N/A	78%	13%
Expenditure	(2,189,700)	(2,254,806)	(2,789,039)
Total surplus/(deficit)	<b>(60,393)</b>	<b>737,120</b>	<b>(148,927)</b>
Split between:			
- Restricted surplus/(deficit)	87,406	4,231	45,500
- Unrestricted surplus/(deficit)	(147,799)	732,889	(194,427)
	<b>(60,393)</b>	<b>737,120</b>	<b>(148,927)</b>
Operating Expenditure (unrestricted)	1,824,573	2,025,172	2,489,039
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	816,714	1,549,603	1,355,176
No of months of operating expenditure	5.4	9.2	6.5
Reserves policy target	912,287	1,012,586	1,244,520
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	(95,573)	537,017	110,657

MEETING 26/03/2020

Ref: 15571

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Urban Partnership Group****Adv: Julia Mirkin****Amount requested: £149,961****Base: Hammersmith & Fulham****Amount recommended: £150,000****Benefit: Hammersmith & Fulham****The Applicant**

Urban Partnership Group (UPG), a charity, was established in 1997 and merged with Blythe Neighbourhood Council in 2008. It now operates from six community buildings in Hammersmith and Fulham, the freehold of two of which belong to UPG.

Supporting the economically or socially disadvantaged by promoting health, leisure and social welfare is the aim of UPG. Regular activities include employment support; youth clubs; parenting support; children's centres; an elders' service and ESOL classes, the focus of this application.

**The Application**

UPG requests support for entry-level ESOL provision for women from migrant communities. In addition to the two weekly ESOL classes; fortnightly one-to-one tuition and opportunities to practice with the support of volunteers offered as part of this programme, this request includes a contribution to the costs of a creche facility and a programme of cultural events to increase exposure to the wider community.

**The Recommendation**

UPG proposes to expand and enrich its pre-entry ESOL provision as part of the proposed holistic programme, designed to support language skills that enable community engagement for migrant women, who often face social isolation.

***£150,000 over three years (3 x £50,000) for a full-time ESOL tutor; Volunteer training; a contribution to creche facilities; exam registration and project management and administration costs.***

**Funding History**

Meeting Date	Decision
09/05/2019	£3,800 over two years (3,800 x 1) to provide an Eco-Audit.
26/11/2015	£26,140 for a third's year support of ESOL pre-entry and Level 1 training for 70 individuals from disadvantaged backgrounds.
06/06/2013	£51,650 over two years (£25,500; £26,150) towards ESOL pre-entry and Level 1 training for 140 individuals from disadvantaged backgrounds for whom no other training is available.
04/06/2009	£25,000 for a third and final year towards the salary costs of a full-time Elders' Project Co-ordinator plus some activity costs.

**Background and detail of proposal**

UPG will deliver entry-level ESOL classes twice a week to 48 women annually, across three sites in Hammersmith and Fulham. Childcare will be offered for up to 32 children each year for the 38-week duration of the course. Each student will receive fortnightly one-to-one tutorials with the course tutor to support individual learning needs and progress against individual learning plans. Participants are encouraged to engage with other UPG community activities, such as the parenting programme, employment workshops or community champions activity. Finally, UPG will offer two

cultural trips per year, supported by volunteers, which will involve taking public transport, visiting new parts of London and engaging with new activities. Recruitment, training and coordination of volunteers is also the responsibility of the ESOL tutor. Volunteers will support students through mentoring; planning and delivery of daytrips; hosting coffee mornings and supporting English practice in informal settings. UPG aims to recruit and train six volunteers, who will be supported through specialist training and accreditation to become Programme Assistants, supporting the longer-term sustainability of UPG's ESOL provision.

ESOL provision was in the top three requested activities by UPG's beneficiaries in the 2019 Service User Survey. The percentage of households with no English speakers in Hammersmith and Fulham overall is 14.5% (Hammersmith & Fulham Borough Profile 2018). However, in the wards targeted by UPG, the percentage increases to 21%. Referrals are directed to UPG by council departments; local voluntary organisations; the job centre and refuges and hostels. UPG is the only ESOL provider in Hammersmith and Fulham that offers childcare facilities, which supports participation by migrant women, who are often isolated due to language barriers. Learning English increases employability; enables community engagement; equips women to access the services they need and allows them to support the education and development of their children.

### Financial Information

UPG owns the freehold to two community buildings, from which it delivers activities. Within UPG's reserves, there is a fund designated for building repairs that amounts to £248,000. During 2019, £36,940 was spent against this fund and £40,000 was transferred from unrestricted funds to replenish this designated fund at the year end. Maintenance of this building repair fund has resulted in reduced unrestricted funds.

UPG's reserves are currently below its reserves policy target. However, its designated fund of £248,000 should cover any unexpected expenditure on building maintenance. UPG uses its charitable expenditure to calculate its reserves policy. This approach was discussed at the assessment meeting and it was agreed that it could be clearer. UPG has committed to reviewing its reserves policy in 2020.

Year end as at 31 March	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,686,750	1,833,915	1,857,828
- % of Income confirmed as at	N/A	94%	87%
Expenditure	(1,661,308)	(1,796,208)	(1,815,828)
Total surplus/(deficit)	<b>25,442</b>	<b>37,707</b>	<b>42,000</b>
Split between:			
- Restricted surplus/(deficit)	8,082	1,000	1,000
- Unrestricted surplus/(deficit)	17,360	36,707	41,000
	<b>25,442</b>	<b>37,707</b>	<b>42,000</b>
Total Expenditure	1,661,308	1,796,208	1,815,828
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	454,468	491,175	532,175
No of months of total expenditure	3.3	3.3	3.5
Reserves policy target	787,010	898,104	907,914
No of months of total expenditure	5.7	6.0	6.0
Free reserves over/(under) target	(332,542)	(406,929)	(375,739)

MEETING 26/03/2020

Ref: 15578

**ASSESSMENT CATEGORY: Bridging Divides - Advice and Support****Age UK Merton****Adv: Sandra Jones****Base: Merton****Amount requested: £178,840****Benefit: Merton****{Revised request: £248,035}****Amount recommended: £248,000****The Applicant**

Age UK Merton (AUKM) has been providing a wide range of services to older people since 1950. The organisation has its own social centre from which it runs several activities such as footcare, information and advice, after-stroke and incontinence support and well-being classes. AUKM also delivers outreach work including cleaning and handyperson services. Merton is a very mixed borough with a sharp distinction in poverty levels between western and eastern wards. Some wards in east Merton, for example, have a life expectancy almost 13 years below the average of West Merton.

**The Application**

AUKM is seeking funding to increase its advice services to older people by appointing an additional full time Information and Advice Adviser and associated running costs. This will increase to service from 2.4 to 3.4 posts. The initial request was for three years of funding, however after discussions with your officer they increased the bid to five years. They also decreased the annual amounts that they originally applied as the request was for more than one post.

This funding will enable the organisation to develop its outreach and home visiting service. Funding will also allow AUKM to develop the Planning for the Future programme which introduces younger older adults to issues around finance; legal, housing and care to prevent future crises.

**The Recommendation**

AUKM has a good reputation for delivery and partnership work in Merton. The majority of AUKMs' clients face poverty, poor physical health, isolation, and mental distress, most of whom lack knowledge about their entitlements. This additional post and associated costs will enable the organisation to meet a current rise in demands for their services by providing quality services, particularly for the most vulnerable older people. Also, to offer preventative work for those older adults by supporting them to plan for the future.

**£248,000 over five years (£47,600; £48,600; £49,600; £50,600; £51,600) towards the costs of a full-time advice worker, management costs and associated running costs.**

**Funding History**

Meeting Date	Decision
25/09/2014	£158,300 over three years (£51,600; £52,600; £54,100) for the salary of a f/t Health Programme Officer plus related project costs of the Active Life health programme in Merton.

## Background and detail of proposal

This funding will work on different levels. Part of the work of the project will involve the development of the organisation's outreach programme to collaborate with other advice providers, partners in health and social care and increase referrals from older people most in need of the service, and not accessing the service currently.

In particular AUKM will work with BAME community groups in East Merton, delivering advice clinics at the groups' premises to break down barriers. It is anticipated that 40% of advice and casework will initially be provided in clients homes and where clients feel most comfortable. The level of support offered will differ, depending on need. Some clients might only need two sessions, others up to five. Where there are complicated cases the advisor will provide longer term support, based on the individuals needs or complexity of the case.

On the preventative side, the project works with younger older adults to introduce them to issues around finance, legal, housing and care. This will be through an initial annual event, with follow up workshops on specific issues identified by the participants.

## Financial Information

The organisations finances for 2019/2020 are on track with the forecast as at the beginning of February 2020 being 90% of their budgeted income, with the outstanding amount due from fees charged. The organisation is holding unrestricted reserves slightly above their target which is the reason that they have a planned deficit for 2020/21.

Year end as at 31 March	2019	2020	2021
	Independent Examined Accounts	Forecast	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	654,494	751,770	686,210
- % of Income confirmed as at 07/02/2020	n/a	90%	n/a
Expenditure	(615,742)	(663,520)	(689,428)
Total surplus/(deficit)	<b>38,752</b>	<b>88,250</b>	<b>(3,218)</b>
Split between:			
- Restricted surplus/(deficit)	4,662	17,853	17,661
- Unrestricted surplus/(deficit)	34,090	70,397	(20,879)
	<b>38,752</b>	<b>88,250</b>	<b>(3,218)</b>
Total expenditure	615,742	663,520	689,428
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	175,366	245,763	224,884
No of months of totalled expenditure	3.4	4.4	3.9
Reserves policy target	153,936	165,880	172,357
No of months of total expenditure	3.0	3.0	3.0
Free reserves over/(under) target	21,431	79,883	52,527

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Grants of £250,000 or Above for Approval	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Decision</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report advises members of funds recommended for approval for amounts of £250,000 or above. Assessment reports for all grants recommended for approval at Annex 1.

## Recommendation

Members are asked to:

- Receive this report and approve the recommended amounts

## Main Report

Member approval is requested for all applications of £250,000 or above, summarised in this report.

The total amount of expenditure and number of items to be approved under are shown in Table 1.

Applications to be considered comprise of Bridging Divides applications.

Scott Nixon  
Head of Director's office  
020 7332 3722, [Scott.Nixon@cityoflondon.gov.uk](mailto:Scott.Nixon@cityoflondon.gov.uk)



## Index of Grant Recommendations (amount requested: above £250,000)

No.	Ref	Grant Organisation	Original Amount Requested	Programme Area	Funding Manager	Location of Organisation	Amount recommended for approval	Grant duration (months)
<b><u>Bridging Divides</u></b>								
13	15670	Children Ahead Ltd	£440,000	Connecting the Capital	Gilly Green	Hackney	£250,000	60
14	15602	Froglife Trust	£280,330	Connecting the Capital	Sandra Jones	Tower Hamlets	£244,200	60
15	15685	Rushey Green Timebank (RGTB)	£323,448	Connecting the Capital	Geraldine Page	Lewisham	£323,500	60
16	15641	Chinese Mental Health Association	£260,864	Positive Transitions	Natalie Jordan	Barnet	£260,900	60
17	15503	Graeae Theatre Company	£260,399	Positive Transitions	Lily Brandhorst	Hackney	£260,400	60
18	15688	Jewish Women's Aid	£966,290	Positive Transitions	Natalie Jordan	Barnet	£248,700	60
19	15452	Kids Can Achieve	£413,209	Positive Transitions	Julia Mirkin	Harrow	£183,600	36
20	15164	Maggie Keswick Jencks Cancer Caring Centres Trust	£515,155	Advice and Support	Gilly Green	Hammersmith & Fulham	£200,000	60
<i>Total Bridging Divides (8 items)</i>			<b>£3,459,695</b>				<b>£1,971,300</b>	
<b>Grand Totals</b>			<b>£3,459,695</b>				<b>£1,971,300</b>	

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MEETING 26/03/2020

Ref: 15670

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****Children Ahead Ltd****Adv: Gilly Green****Base: Hackney****Amount requested: £440,000.00****Benefit: Hackney****Amount recommended: £250,000****The Applicant**

Children Ahead (CA), a charity, works with the Charedi (Orthodox Jewish) community to support children with learning difficulties to achieve their personal best by providing integrated interventions for their development. It also empowers parents and families of children with learning disabilities to take an active role in their child's education and health. CA also gives schools and teachers the skills and resources they need to identify, refer and support children with learning disabilities.

**The Application**

The Charedi community in Hackney is the largest outside of Israel. It has limited interaction with the mainstream community and children are educated in Charedi schools. The community has high levels of poverty and for those with children experiencing difficulties at home, at school and socially, access to relevant support services is more difficult due to cultural and language barriers. Whilst many of the children it works with are in receipt of an Education, Health and Care Plan through the school system, many do not meet the threshold and risk slipping through the net. Many children experience underlying mental health problems either masked as learning difficulties or trauma due to family illness, dysfunction or abuse, but there is a widespread mistrust of psychological services provided by the mainstream community, believing it is incompatible with Orthodox Judaism. CA has worked hard within the Charedi community to build trust and transcend these barriers and has provided mental health support alongside its learning disabled focus. Its trained psychotherapists and group facilitators from within the community provide sessions in its fun, educational and neutral space designed to overcome stigma associated with mental health issues. The application is to expand its provision of psychotherapy for children and young people to meet increasing need and includes sessional therapists' fees, clinical supervision, one to one mentoring and a social skills coordinator; along with a contribution to administration and core costs. Having previously only supported work with boys, it is now expanding its services to also include work with girls.

**The Recommendation**

Children Ahead has a good track record of providing services to this specific community and has been providing therapeutic activities for over ten years. It has built a trusted reputation within the Charedi community and is well networked both within mainstream mental health services and with local Charedi schools and parents. The service is filling an important gap in mental health support for a community that does not easily access mainstream services. Some funds have already been raised towards the project and a contribution towards the full costs is advised in line with your typical level of funding for projects of this nature. A grant is recommended as follows:

***£250,000 over five years (5 x £50,000) towards the costs of psychotherapeutic and other mental health support to young people, both boys and girls. Release of year 2 of the grant is conditional on the charity having recruited at least one woman to the Board of Trustees.***

## Funding History

None

## Background and detail of proposal

The grant will provide a variety of activities including one-to-one psychotherapy with each child receiving 12-24 sessions depending on need; social skills groups targeting those whose behaviour difficulties impact their ability to socialise (including those with ADHD); and a pilot project of one-to-one post intervention mentoring that will help strengthen the child's ability to continue to use the tools they have gained to maintain levels of improvement. All therapists and the clinical supervisor work on a freelance basis. However, there is now a recognition that this arrangement may not provide appropriate levels of internal oversight or accountability, and so CA plans to recruit an in-house clinical supervisor. With only four trustees the organisation is also committed to increasing this number and to include women on its Board. One woman with clinical expertise (a current gap on the Board) has already been identified.

## Financial Information

CA receives most of its funding from Charitable Trusts and Foundations including recent grants from BBC Children in Need, Comic Relief, and a 5-year commitment from the National Lottery Community Fund. It also has a small unrestricted contribution from the London Borough of Hackney and generates approximately 20% of its income from user contributions. Until recently it has struggled to build reserves but as its unrestricted income grows the position has improved and next year it anticipates a surplus which will enable the organisation to meet its reserves policy. Its multi-year grants mean that CA has over 80% of its income confirmed for the current year ending in July 20 and 78% for the following year putting the organisation onto a much more secure financial footing.

Year end as at JULY 31st	2018	2019	2020
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	603,628	729,473	882,130
- % of Income confirmed as at 18th Feb 2020	N/A	100%	88%
Expenditure	(595,883)	(723,833)	(821,462)
Total surplus/(deficit)	<b>7,745</b>	<b>5,640</b>	<b>60,668</b>
Split between:			
- Restricted surplus/(deficit)	0	0	0
- Unrestricted surplus/(deficit)	7,745	5,640	60,668
	<b>7,745</b>	<b>5,640</b>	<b>60,668</b>
Operating Expenditure (unrestricted)	363,063	513,374	512,962
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	69,757	75,397	136,065
No of months of operating expenditure	2.3	1.8	3.2
Reserves policy target	90,765	128,343	128,240
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(21,008)	(52,946)	7,825

MEETING 26/03/2020

Ref: 15602

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****Froglife Trust****Adv: Sandra Jones****Base: Tower Hamlets****Benefit: London-wide****Amount requested: £280,330****{revised request: £244,330}****Amount recommended: £244,200****The Applicant**

Froglife Trust (FT) is a national charity which was established in 2002. Its mission is to support the conservation of amphibians and reptiles – frogs, toads, newts, snakes and lizards – and to save the habitats they depend on. It actively encourages people who are not usually involved in conservation and concentrates on “on the ground” action which directly benefits amphibians (e.g. through the care of habitats). It has been particularly successful over the years in delivering environmental education programmes and in incorporating new audiences.

**The Application**

Building on work undertaken in Glasgow, Somerset and Peterborough, FT wishes to involve people with on-set dementia in a project called Leaping Forward for Dementia. This project has three elements: wildlife gardening workshops; wildlife gardening sessions; and wildlife routes. This will be achieved by employing a full-time project manager and associated running costs. The initial budget had high overhead costs which the organisation has subsequently reduced.

**The Recommendation**

FT has built a good reputation for providing opportunities for people who would not normally get involved in conservation of wildlife. One such scheme, funded by CBT, used young offenders to improve habitats in London. They have developed the model for Leaping Forward for Dementia through three projects elsewhere in the UK, one semi-rural and two urban areas. Evaluation of this work shows increased quality of life for the participants. A grant is advised:

***£244,200 over five years (£46,500; £47,400; £48,700; £50,000; £51,600) for the salary of a f/t Project Manager and running costs for the Leaping Forward for Dementia project.***

**Funding History**

Meeting Date	Decision
26/11/2015	£54,000 over two years (2 x £27,000) for the salary of a p/t (3 dpw) Project Assistant and related costs of the Dragon Finder project for London.
27/09/2012	£77,000 over three years (£35,000; £21,000; £21,000) towards the costs of the Dragon Finder project, including a p/t (3dpw) Project Assistant.

**Background and detail of proposal**

Identifying areas across London, some of which LT are already working in, people living with dementia will be taken on a wildlife journey through three activities. The first is wildlife gardening workshops, undertaken indoors where they build a wildlife garden using props. These sessions include young people who work with those with on-set/ mild dementia to gather wildlife memories and experiences through informal

chats, creating an anthology and introducing the other activities. One workshop will be dedicated to passing on skills to carers and social workers to deliver the workshops in future.

Participants will then get involved with the second activity – wildlife gardening. They will get involved with physical improvements to community green spaces including ponds, hibernacula, feeding stations, pond dipping. This will be one session per week for eight weeks. In year one there will be five groups with six groups in subsequent years. The final activity is wildlife routes, which is weekly specialised training sessions for ten weeks to improve confidence and self-esteem; this could include wildlife photography / filming, graffiti art, creating a sculpture.

FT will be working with a range of partner organisations who work with people with dementia as well as Local Authority social care departments.

### Financial Information

Froglife has a diverse range of income streams and their income rose by £330,000 in 2019 due to an EU grant through the Biodiversity Fund, managed by the Scottish Natural Heritage, and the figure for 2020 includes a further large grant from Natural Heritage.

The unrestricted forecast for 2019/20 is cautious and in reality, the organisation is confident that their unrestricted income will exceed that stated in the table below. The organisation stated that budget was drawn up in September 2019 for the year October 2019 – September 2020 and it is difficult to forecast accurately. Since drawing up the budget for CBT they have brought in additional funding such as expanding the training courses on offer, we have also secured more contracts through FES which has brought in an additional £15,000 (Environment Agency) plus some smaller contracts.

Year end as at 30 September	2018	2019	2020
	Independent Examined Accounts	Independent Examined Accounts	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	707,586	1,009,992	1,217,543
- % of Income confirmed as at 17/01/2020	n/a	n/a	63%
Expenditure	(709,616)	(833,441)	(1,204,540)
Total surplus/(deficit)	<b>(2,030)</b>	<b>176,551</b>	<b>13,003</b>
Split between:			
- Restricted surplus/(deficit)	(75,066)	65,287	142,668
- Unrestricted surplus/(deficit)	73,036	111,264	(129,665)
	<b>(2,030)</b>	<b>176,551</b>	<b>13,003</b>
Total expenditure	709,616	833,441	1,204,540
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	158,220	270,094	140,429
No of months of totalled expenditure	2.7	3.9	1.4
Reserves policy target	177,404	208,360	301,135
No of months of total expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(19,184)	61,734	(160,706)

MEETING 26/03/2020

Ref: 15685

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital****Rushey Green Timebank (RGTB)****Adv: Geraldine Page****Base: Lewisham****Amount requested: £323,448****Benefit: Lewisham****Amount recommended: £323,500****The Applicant**

Originally set up in a busy health centre in Lewisham, Rushey Green Time Bank (RGTB) is a local charity that enables people to share time and skills to build happier, healthier communities. Time banking uses an asset-based approach and works by facilitating the exchange of skills and experience within a community. It values people and recognises that everyone has something special to offer others in the form of knowledge, skills and time. The charity improves the wellbeing of individuals by enabling the local community to provide care and services for each other through a variety of activities that involve using people's skills and talents. As people start to help and get to know their neighbours, they rebuild a sense of trust and community belonging. RGTB was one of the first examples of social prescribing and was the first timebank founded in a healthcare setting. The organisation continues to have a particular focus on reducing social isolation. Overtime RGTB has also developed several different projects from the ideas and skills of its members. These include FoodCycle Lewisham, a project offering a free community cooked meal using surplus food every Saturday; Wild Cat Wilderness (currently funded by the Trust) a community green space developed and maintained by volunteers; a pilot time banking project with Macmillan Cancer Support for people affected by cancer in Lewisham and it hosts Lewisham Local, an initiative that encourages local giving and it the subject of this application.

**The Application**

This proposal from RGTB is made on behalf of Lewisham Local (LL), a collaboration of community, voluntary, business and public sector organisations. LL is a place-based giving initiative promoting an asset-based approach that maximises participation and the long-term contribution from all communities within Lewisham. It aims to inspire local people, businesses and organisations to give more towards the needs of Lewisham's communities, encouraging a stronger sense of 'place' for those who live, work, visit and study in the borough and to make the borough fairer and more inclusive. RGTB is a key partner of the LL Collaborative, with a strong track record of community development and spearheaded the collaborative's first initiative, the Lewisham Local Community Contributor Card. RGTB are seeking funding for the FT salary costs of a LL Director to oversee the strategic development of the giving scheme plus project costs to build on current innovative initiatives and develop more projects and activities to attract local people and businesses to give.

**The Recommendation**

RGTB is a multi-award-winning time bank and is known internationally for its pioneering work. Through time banking principles and coproduction, it provides an empowering and transformational form of volunteering that gives self-confidence to people who would not normally be involved in their local community. The charity is a founding member of Lewisham Local (LL) hosting it since June 2017 and continues

to play a pivotal role in the development of this Giving initiative, bringing together the voluntary and public sector, local businesses and communities to inspire and mobilise people to give towards good causes in Lewisham. RGTB has a very good track record of delivery in Lewisham and has an effective and strong Strategic Partnership Board for LL. This has been recognised by Lewisham Council who in 2019 awarded RGTB a contract to provide voluntary sector infrastructure support across Lewisham. It has the in-depth knowledge and confidence of local communities to continue to develop and deliver Giving in Lewisham. LL has played an active role in the London's giving network and will continue to engage and learn from other schemes and contribute its experience. Whilst your policy is usually to award one grant to each organisation this application provides an exception as RGTB is the most appropriate agency to host Lewisham Local Giving. The application fits well with your Connecting the Capital programme and funding is recommended:

***£323,500 over 5 years (5 x £64,700) towards a f/t Director of Lewisham Local plus associated running costs for the development and consolidation of Lewisham Local.***

### **Funding History**

Meeting Date	Decision
27/07/2017	£113,000 over three years (£41,000; £35,000; £37,000) for the salary of a Co-ordinator (p/t 16 hrs per week) and Assistant (p/t 8 hrs per week) and associated direct costs of the Wild Cat Wilderness project.
27/07/2017	£72,340 over two years (£36,170 x 2). The grant to be received by Rushey Green Time Bank on behalf of the Lewisham Local Collaborative, as part of the London's Giving initiative.

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

Historically you have supported the Lewisham Local Collaborative via RGTB, as part of the London's Giving initiative. This funding would enable it to build on the excellent work already achieved (highlighted below) and to develop in line with its long term vision taking advantage of the growing number of businesses and individuals involved in LL and develop further opportunities. The Director will oversee the strategic development of the scheme, manage the cross-sector collaborative board, build relationships, manage staff, resources and local/regional partnerships. Plans include new infrastructure systems to attract and manage funds, administer grants to local organisations and develop communication with its growing network. A platform that facilitates a cross sector eco-system of giving and sharing time and resources, employee volunteering, gifts-in-kind, events and VSC knowledge and expertise and sharing. Project costs will build on current innovative initiatives and develop more projects and activities to attract local people to give.

To date LL projects include:

- Lewisham Local Card – given to local volunteers who give their time for free. Local businesses offer discounts and deals to thank the volunteers for what they do in the community. Over 5,000 local volunteers, 200 local charities and over 370 local businesses are part of the card.
- Lewisham Community Toilets Scheme – commissioned by Lewisham Council as an alternative to public toilets that have been closed, LL have a contract to

recruit businesses willing to offer the public free access to their toilets and there are now 61 community toilets in Lewisham.

- Refill Lewisham – following on from LL's successful work developing a network of community minded business, the Greater London Authority (GLA) approached LL to trail a network of local businesses that would offer free water refills to help reduce single-use plastic waste. There are now 100 businesses offering free water refills.
- Lewisham Local Training and Workshops – LL has developed skills-sharing workshops where local businesses offer short practical training to local charities and other businesses as a way of giving to the community

### Financial Information

The charity is experiencing considerable growth and continues to diversify its portfolio of projects tailored to the needs and aspirations of the community. It is also adopting its new role of Voluntary Sector Infrastructure support in Lewisham. A three-year contract with the Local Authority awarded in 2019. The organisation is well managed and in a good financial position. Free reserves are below the trustee's policy of 3-6 months of expenditure, however 75% of projected income for 2021 is already secured and RGTB will endeavour to increase unrestricted surplus.

Year end as at 31 March	2019	2020	2021
	Examined Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	265,360	350,507	449,677
- % of Income confirmed as at 20/2/20	N/A	100%	75%
Expenditure	(279,577)	(320,909)	(436,789)
Total surplus/(deficit)	<b>(14,217)</b>	<b>29,598</b>	<b>12,888</b>
Split between:			
- Restricted surplus/(deficit)	(21,428)	27,758	0
- Unrestricted surplus/(deficit)	7,211	1,840	12,888
	<b>(14,217)</b>	<b>29,598</b>	<b>12,888</b>
Total Expenditure	279,577	320,909	436,789
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	84,639	86,479	99,367
No of months of expenditure	3.6	3.2	2.7
Reserves policy target	69,894	80,227	109,197
No of months of expenditure	3.0	3.0	3.0
Free reserves over/(under) target	14,745	6,252	(9,830)

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MEETING 26/03/2020

Ref: 15641

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Chinese Mental Health Association****Adv: Natalie Jordan****Base: Barnet****Amount requested: £260,864****Benefit: London-wide****Amount recommended: £260,900****The Applicant**

The Chinese Mental Health Association (CMHA) was founded in 1993 and registered as a charity in 1996. Its aims varied over its early years covering local services in East London and national campaigning; it now has a local wellbeing support focus. CHMA settled in Barnet in 2016, home to the UK's largest Chinese population and accessible to the north "sub-region" of London that includes a third of London's 150,000-strong Chinese population. It now reaches 4,000 Londoners a year and is the only mental health service in London catering to Chinese communities, aiming to destigmatise mental health problems and provide culturally sensitive mental health services. It receives statutory funding to operate part of Barnet IAPT Service and the Barnet Wellbeing Hub and is at Level B on Barnet's Quality Assurance Framework.

**The Application**

CMHA seeks funding over five years for the three strands of its established Chinese Wellbeing Service:

- Volunteer Befriending by trained volunteers either at home or over the phone, supporting vulnerable, elderly, isolated and house-bound people with mental health issues;
- the Recovery Club, a weekly meet-up where attendees can access peer support and social activities for those with mental health illnesses, and;
- the Prevention Club, a weekly group focussing on wellbeing activities to prevent mental health worsening and includes those without a diagnosis.

**The Recommendation**

CMHA has made significant in-roads in destigmatising mental health issues in the local Chinese community, working through reluctance from individuals to associate with the charity to establish itself as a trusted organisation. However, there remain traditional and ongoing cultural barriers, particularly amongst older people, which necessitate a specific service. This can include stigma towards mental health issues and an emphasis on dealing with personal problems privately. CMHA balances Western and Traditional Chinese Medicine approaches to bridge connections between the two, involving experts from both fields.

The well-attended Prevention Club is a key strand in addressing these barriers, with an emphasis on wellbeing and social activities bringing in those who would otherwise not seek mental health support before problems worsen. This embodies your principle of Early Action, making support accessible early on, from which individuals can be supported navigating available services. There is natural flow between this and the Recovery Club as attendees come to terms with or improve their mental health issues and mental health is further destigmatised.

Through CHMA's culturally specific, holistic and accessible approach, older people and those from migrant backgrounds with mental health issues can connect in with community activity and are supported in connections onwards to other mainstream services through established connections with relevant organisations. The application was submitted under your migrant and refugees priority, but it notably cross-cuts a number of priorities under Positive Transitions: just under half of beneficiaries of the Wellbeing Service are over 65; and all fall under your definition of disability due to diagnoses of complex mental health illnesses. As such, funding is recommended:

***£260,900 over 5 years (£50,700; £51,600; £52,600; £52,500; £53,500) for a Co-ordinator (0.8FTE), Support Worker (0.2FTE), volunteer expenses and running costs for the Chinese Wellbeing Service.***

### **Funding History**

Meeting Date	Decision
31/05/2012	£120,000 over three years (3 x £40,000) towards the salary and related costs of the Chief Executive post.

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

An independent evaluation (2019) found that the Wellbeing Service offers a warm and safe environment, with 100% of beneficiaries reporting improvements in psychological wellbeing and healthier lifestyles, and 95% improved physical health. The most common issues faced by those supported through the befriending service are depression, social isolation and psychosis or schizophrenia; in the social clubs, common issues are depression and social isolation. Many service users have related physical health problems; 38% reported loneliness; many commented on nervousness accessing support as a result of anticipated stigma.

This application represents a scaling down of previous work, equivalent to approximately half of the now concluded annual funding from the National Lottery Community Fund. Costs are reduced as a result of the project's development during this time, such as: reduced costs in venue hire since the charity took over the Meritage Centre; many of activities gradually converting to self-funded or changed to more sustainable activities; and establishment of a core base of dedicated volunteers able to run projects with minimal support requirements. In addition, some targets are scaled back, and CMHA will continue to fundraise and explore opportunities to deliver other wellbeing activities at the Meritage Centre.

### **Financial Information**

Approximately 75% of CMHA's income is from statutory sources relating to contracts with Barnet Council. CMHA is seeking to diversify income and generate more from charitable funding. The longer term vision is to generate more income through the Meritage Centre with an onsite café and fee-based services.

The table shows that reserves held at year end are below policy target level. However, this level is above three months' equivalent expenditure which the board have agreed is a suitable minimum. The longer-term aspiration is to achieve an equivalent of six months' expenditure in reserves, within the next five years.

Year end as at 31st March	2019	2020	2021
	Signed Accounts	Budget	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	400,665	338,654	558,114
- % of Income confirmed as at 28/11/2019	N/A	100%	67%
Expenditure	(392,410)	(332,654)	(518,615)
Total surplus/(deficit)	<b>8,255</b>	<b>6,000</b>	<b>39,499</b>
Split between:			
- Restricted surplus/(deficit)	(10,264)	0	0
- Unrestricted surplus/(deficit)	18,519	6,000	39,500
	<b>8,255</b>	<b>6,000</b>	<b>39,500</b>
Total expenditure	392,410	332,654	518,615
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	120,574	126,574	166,074
No of months of operating expenditure	3.7	4.6	3.8
Reserves policy target	196,205	166,327	259,308
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	(75,631)	(39,753)	(93,234)

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MEETING 26/3/2020

Ref: 15503

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Graeae Theatre Company****Adv: Lily Brandhorst****Base: Hackney****Amount requested: £260,399****Benefit: London-wide****Amount recommended: £260,400****The Applicant**

Graeae (GTC) is a theatre company led by D/deaf and disabled actors. It works to revolutionise access in the performing arts by placing disabled artists centre stage in a range of innovative performances; offering training and learning opportunities for young D/deaf and disabled artists; and providing a platform to develop and showcase new writing. Based in East London in fully accessible studios, Graeae's reach is international, with performances and training programmes touring to multiple countries. A signature of GTC's work is the creative integration of sign language, captioning and audio description into productions from the very beginning. Graeae is an Arts Council National Portfolio Organisation and is widely recognised as a sector leader in accessibility and the arts.

**The Application**

GTC seeks funding towards its training and learning work, including the salary of its Training and Learning Co-ordinator. A grant from Trust will provide funding towards:

- The Rollettes, a theatre group for D/deaf and disabled children aged 5 – 11.
- The Young Company, a theatre group for D/deaf and disabled young people aged 12 – 18.
- The Ensemble Intensive, a bespoke training programme to help D/deaf and disabled young adults aged 17 - 30 progress their careers in the creative industries.

For all three age groups, training in theatre arts is combined with age-appropriate support in developing life skills, confidence and independence.

**The Recommendation**

Graeae's reputation precedes it as a centre of excellence in access to the arts. The charity has held two previous grants from City Bridge Trust, both of which were delivered to a high standard. Match funding is secured from Arts Council England and Awards for All for the first two years, with less than £20,000 to find for each of the final three years. A grant is recommended as follows:

***£260,400 (£49,920; £50,968; £52,048; £53,159; £54,304) towards the 0.8FTE salary costs of the Training and Learning Co-ordinator and associated costs of the Rollettes, The Young Company and The Ensemble Intensive training programmes.***

**Funding History**

Meeting Date	Decision
28/01/2015	PROJECT DESCRIPTION £138,650 over three years (£43,300; £47,400; £47,950) towards 0.5FTE of the full-time salary costs of the Training and Learning Manager and associated programme costs of the Young Artistic Advisors programme.

10/09/2009	£90,000 over three years (3 x £30,000) towards a participative programme of street arts for disabled people.
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### Background and detail of proposal

There is plentiful research showing that deaf and disabled people are denied opportunities to participate and work in activities including the arts, due to access, cost, transport or others' attitudinal barriers. GTC exists to support disabled young people's personal and creative development and to help those trying to develop a career in the arts.

All three programmes supported through this grant will feature activities that: address the barriers that deaf and disabled young people face in accessing activities and training; build skills and training through the arts; encourage young people to co-create and lead, developing their creativity and independence; and (according to participants' age) address wider barriers to independence, such as attitudes from non-disabled family members and practical issues such as money and housing. There is a strong sense of community and mutual support between participants in each group.

Rollettes and Young Company groups will each provide ten sessions to 15 children and young people a year, while the Ensemble intensive is a year-long programme working with 20 young adults per year. All groups benefit from Graeae's partnerships with local delivery partners working in the arts and disability. For Ensemble members this offers additional options for progression and accreditation.

### Financial Information

Graeae was hit by a 180% rent increase in 2018 but this is being offset by restricted and designated funds set aside for this purpose. Free reserves appear high at the end of 2020 but this is in preparation for the planned deficit in 2021. It is a difficult funding environment for the arts at present and GTC expects a key funding source to significantly decrease in coming years. Your officer therefore deems it appropriate for the charity to hold this level of free reserves in the short-term, while planning for the future.

Year end as at 31st March	2019	2020	2021
	Signed Accounts £	Forecast £	Budget £
<b>Income &amp; expenditure:</b>			
Income	1,284,155	1,211,281	1,307,685
- % of Income confirmed as at 7/2/2020	N/A	87%	61%
Expenditure	(1,465,600)	(1,345,789)	(1,598,700)
Total surplus/(deficit)	<b>(181,445)</b>	<b>(134,508)</b>	<b>(291,015)</b>
Split between:			
- Restricted surplus/(deficit)	(195,528)	(246,487)	(162,000)
- Unrestricted surplus/(deficit)	14,083	111,979	(129,015)
	<b>(181,445)</b>	<b>(134,508)</b>	<b>(291,015)</b>
Operating Expenditure (unrestricted)	670,260	749,443	794,400
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	536,001	647,980	518,965
No of months of operating expenditure	9.6	10.4	7.8
Reserves policy target	335,130	374,722	397,200
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	200,871	273,259	121,765

MEETING 26/03/2020

Ref: 15688

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Jewish Women's Aid****Adv: Natalie Jordan****Base: Barnet****Benefit: London-wide****Amount requested: £966,290****{Revised request: £248,791}****Amount recommended: £248,700****The Applicant**

Jewish Women's Aid (JWA) is the only specialist organisation in the UK supporting Jewish women and girls and their children who are affected by domestic and sexual violence in their intimate relationships. It emerged in the 1980s in London and Leeds, where Jewish social workers sought ways to support Jewish women affected by violence and abuse; the two merged in the 1990s. An independent charity, it is a member of and quality accredited by the national Women's Aid Network, working closely with Solace Women's Aid. It offers counselling services, a professional Domestic Abuse Service, an anonymous helpline, training and education programmes, and, most recently, the Dina Service for survivors of sexual violence.

**The Application**

JWA seeks funding for its flagship Domestic Abuse Service, available to all Jewish women, from those who self-identify as Jewish to those from Charedi (Jewish Orthodox) communities. A Domestic Abuse (DA) Worker, accredited as an Independent Domestic Violence Advocate (IDVA) with SafeLives accreditation, supports women from initial contact, ensuring the client's (and any dependents') safety. Support continues through regular risk assessments, check-ins and meetings, safeguarding referrals, and a support plan that focuses on safety, physical and emotional health, housing, employment, and benefits. The DA Worker also supports the arrangement of legal advice and facilitates support at family court from trained volunteer McKenzie friends, increasing the likelihood of obtaining civil orders that secure their home.

**The Recommendation**

JWA's original application included costs attributable to the whole Domestic Abuse Service in London. At assessment, your officer encouraged JWA to submit a revised bid that was more clearly costed and commensurate with the costs directly associated with the full-time DA Worker post: related training, supervision (including clinical), and a core contribution. It is this revised proposal that informs the below recommendation:

***£248,700 over 5 years (£47,300; £48,500; £49,700; £51,000; £52,200) for a Domestic Abuse Worker (35 hpw) and associated costs for its London service.***

**Funding History**

Meeting Date	Decision
09/09/2010	Application declined as did not meet the funding criteria.

**Background and detail of proposal**

Perpetrators of violence and abuse will often use faith and community as a tool of abuse. The provision of a culturally specific service enables Jewish women to

access support where there is an understanding of related needs and experiences that generic programmes are not always able to address. Jewish beliefs, for instance, can include an emphasis on family life and peace in the home, which can exacerbate the difficulty faced by women in leaving an abusive home life: it is estimated that it takes Jewish women two years longer (11.5 years total) on average to take the first step in leaving an abusive home.

Barnet, where the charity is headquartered, has the proportionately largest Jewish community in the country, and 250,000 Jewish people are estimated to live in London.

### Financial Information

JWA's reserves policy does not define a specific target while the charity undergoes a period of significant expansion. However, during the assessment JWA indicated that it aims to maintain reserves in excess of six months' total expenditure.

In JWA's draft accounts for 2019, free reserves held are the equivalent to 9 months' total expenditure. Due to an increase in client base (up 50% since 2015), JWA has invested in expanding services including increasing front-line staff and office space, utilising unrestricted reserves and further deficits on unrestricted turnover are expected. In order to stem deficits, JWA is increasing fundraising activities whilst prioritising applications for multi-year funding to ensure continuity for its core services, whilst continuing to apply for some smaller grants to mitigate overreliance on few larger funders. Reserves are not expected to deplete lower than the minimum six months defined. Whilst the table shows forecasts a deficit on restricted funds, this relates to specific project funding and not core services; if funding were not secured the activities and therefore expenditure would not be made.

Year end as at July 31st	2018	2019	2020
	Signed Accounts	Draft Accounts	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	705,927	1,032,482	878,042
- % of Income confirmed as at 30/11/2019	N/A	N/A	54%
Expenditure	(807,021)	(888,135)	(1,116,413)
Total surplus/(deficit)	<b>(101,094)</b>	<b>144,347</b>	<b>(238,371)</b>
Split between:			
- Restricted surplus/(deficit)	(11,610)	197,879	(137,781)
- Unrestricted surplus/(deficit)	(89,484)	(53,532)	(100,590)
	<b>(101,094)</b>	<b>144,347</b>	<b>(238,371)</b>
Total expenditure	807,021	888,135	1,116,413
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	736,227	693,902	593,312
No of months of operating expenditure	10.9	9.4	6.4
Reserves policy target	403,511	444,068	558,207
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	332,717	249,835	35,106

MEETING 26/03/2020

Ref: 15452

**ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions****Kids Can Achieve****Adv: Julia Mirkin****Base: Harrow****Amount requested: £413,209.00****Benefit: Harrow****Amount recommended: £183,600****The Applicant**

Kids Can Achieve (KCA) was established in 2002 by local parents to support disabled children and young people (CYP) and their families in Harrow. In 2016, KCA entered into a formal legal partnership in the form of a sole membership arrangement with The Westminster Society, a larger-scale London-based charity that supports people with learning disabilities and their families. KCA remains a distinct charity with its own Board but has only one member, The Westminster Society, which has the right to appoint Trustees. The Westminster Society also provides a management service to KCA, including finance, HR, marketing and property maintenance for an annual fee, which currently stands at £36,000 for 2019-20.

A range of activities are offered by KCA, including play sessions; outreach in the home or in schools; short breaks; after-school clubs; counselling and family support services. KCA supports CYP with physical disabilities; autism; learning disabilities; and communication and behavioural needs up to the age of 25. It aims to provide engaging, inclusive and innovative play and experiential activities that enable beneficiaries to develop socially and emotionally and progress towards adulthood.

**The Application**

The proposal comprises three elements: one-to-one Family Support, which supports letter writing; benefits maximisation; and mediation etc.; weekly drop-in sessions, which allow families with disabled CYP to network, share experiences and advice; and individual and group therapy, all of which is offered from KCA's base in Harrow.

The grant amount recommended is lower than the sum requested because the original request was considered to have been over costed by your officer. Furthermore, a three-year instead of a five-year grant is recommended due to the current financial fragility of KCA and this being a fairly new funding relationship.

**The Recommendation**

KCA has applied under your Positive Transitions strand of Bridging Divides, specifically your priority to fund specialist support services for Deaf and Disabled people to increase choice and control. The one-to-one and drop-in sessions, facilitated by the Family Support Workers, are a close fit to your priority to enhance choice and control for families with disabled children. The therapeutic elements of this proposal are presented as complementary to the one-to-one and drop-in sessions. As well as supporting KCA's holistic approach, the proposed therapeutic elements meet your stated outcome of enabling improved access to specialist support services for vulnerable and disadvantaged Londoners.

***£183,600 over three years (£60,000; £61,200; £62,400) towards the salary of one F/t Family Worker; individual and family therapy sessions and a contribution to building and organisational running costs.***

## Funding History

Meeting Date	Decision
09/09/2010	£43,300 toward access improvements of the new centre.

## Background and detail of proposal

The link between disability and poverty is well recognised: statistics published by Contact a Family in 2018, stated that over 33% of families with a disabled child face costs amounting to £64,800 from birth to 18 years, highlighting the need to support families to access all the financial support available to them. Learning disabled CYP are highly susceptible to isolation; anxiety; depression and offending. These challenges inevitably impact family life – as well as impacting on the CYP directly - and can lead to family breakdown, poor health and domestic violence.

During the funding period, KCA will support 80 families in Harrow to have greater choice and control about care for their disabled children; improved understanding of their disabled children and their needs and new skills to manage relationships within the family. This will be achieved through the provision of four drop-in networking and support session per week, accommodating 40 families; ten creative psychotherapy sessions per week, available to 24 families; and one-to-one family support sessions that assist with practical tasks involved in the management of care for disabled children. This could involve accessing benefits, treatment; support; or educational provision; gaining a diagnosis or referral and ensuring referral routes are accessible.

## Financial Information

Since 2016, KCA's financial management has been overseen by The Westminster Society, during which KCA's finances have stabilised. Fundraising for restricted income from Trusts and Foundations for additional activities not funded by local authority contracts is carried out by the Marketing Manager at KCA, which increasingly reflects full-cost recovery. During the assessment meeting, it was agreed that CoRF does not fully reflect fundraising expenditure. The significant increase in budgeted income in 19-20 includes £533,167 of unconfirmed multi-year restricted grants, including the £413,209 requested from CBT. KCA has confirmed income for 19-20 of £579,858 which exceeds budgeted expenditure. Free reserves are currently below target and the organisation is working towards rectifying this position.

Year end as at 31 March	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	634,704	1,114,693	645,660
- % of Income confirmed as at 26.02.20	N/A	52%	65%
Expenditure	(645,006)	(560,048)	(565,017)
Total surplus/(deficit)	<b>(10,302)</b>	<b>554,645</b>	<b>80,643</b>
Split between:			
- Restricted surplus/(deficit)	(7,515)	543,967	80,643
- Unrestricted surplus/(deficit)	(2,787)	10,678	0
	<b>(10,302)</b>	<b>554,645</b>	<b>80,643</b>
Operating Expenditure (unrestricted)	455,557	428,404	540,017
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	62,313	72,991	72,991
No of months of operating expenditure	<b>1.6</b>	<b>2.0</b>	<b>1.6</b>
Reserves policy target	161,252	140,013	141,254
No of months of operating expenditure	<b>4.2</b>	<b>3.9</b>	<b>3.1</b>
Free reserves over/(under) target	(98,939)	(67,022)	(68,263)

MEETING: 26/03/2020

Ref: 15164

**ASSESSMENT CATEGORY: Bridging Divides - Advice and Support****Maggie Keswick Jencks Cancer Caring Centres Trust****Adv: Gilly Green****Base: Hammersmith & Fulham****Benefit: London-wide**

**Amount requested: £515,155**  
**(Revised request: £318,325)**  
**Amount recommended: £200,000**

**The Applicant**

Maggie Keswick Jencks Cancer Caring Centres (Maggie's) provides a unique model of practical, social and emotional support tailored to meet the individual needs of people affected by cancer. Maggie's run 20 centres in England and Scotland and offers drop-in services, along with a full programme of social, psychological and emotional care. The organisation, s charity, employs around 200 staff.

**The Application**

On average people receive a cancer diagnosis in seven minutes. Fear, despair and confusion can take hold, together with emotional challenges that are difficult to face alone. Whilst medical teams focus on giving the best possible medical care, they simply do not have time to answer all the overwhelming questions which may arise when an individual receives a cancer diagnosis, including financial concerns. A recent report from Macmillan suggested that four in five people are, on average, £570 a month worse off as a result of a cancer diagnosis. The frequent reduction in income coupled with increased outgoings of travel to hospital appointments, home adaptations and spiralling bills, can add to the anxiety and lack of control experienced by people living with cancer. This application aims to address the lack of financial support by seeking five-year funding for a specialist senior welfare rights and benefits worker who will aim to maximise income for people affected by cancer and work across two centres in London.

**Recommendation**

Maggie's is a well-known cancer support charity working with high numbers of users. It can demonstrate effective outcomes in debt management and securing significant financial benefits for its users. Whilst cancer can and does affect anyone, this service works to ensure that services are open to all, including those with less resource or who face language barriers. It meets the aims of your Advice and Support programme as it will improve the economic circumstances of many people and enable more people to access debt and legal services before they hit crisis point. The original application was for over £500,000 over 5 years and included two dedicated posts. On request the organisation submitted a reduced budget for one post but the cost of the work at over £60,000 per year remains high and given the organisation's reserve position your officer recommends making a reduced contribution which would still enable all the intended targets and outcomes to be met. A grant over 5 years is recommended as follows:

***£200,000 over five years (5 x £40,000) towards the salary and on costs of a Senior Welfare Rights and Benefits Worker in London.***

**Funding History**

None

## Background and detail of proposal

The aim of this work is to increase the household income of Londoners with cancer and as appropriate, their carers and family members, to make life more manageable and reduce the stress and anxiety of the financial challenges that come with a cancer diagnosis. Maggie's does this through benefits advice, hardship grants, help with housing (eviction, homelessness), employment rights (unfair dismissal, support back to work) and immigration and legal issues. Many of the Centre's visitors live in deprived parts of London and are already battling inequalities around employment, housing, and social issues as well as language barriers, and the welfare benefits team can help address issues on their behalf before their situations worsens and they face court cases, eviction and homelessness. Services are offered in a range of languages, including four Asian languages. The centre helps people draw up realistic personal budgets, prioritise debts and set up repayment plans. Service users seeking financial advice visit the centres and so also have access to the full range of emotional, therapeutic and social support offered by Maggie's.

## Financial Information

Maggie's raises significant funds each year and does this through a diverse range of donors and income streams including charitable trusts, local community fundraising, the People's Postcode Lottery, legacies, companies and individuals. Trading activities account for approximately 15% of income. Maggie's receives very little statutory funding. The organisation has delivered annual surpluses for the last three years, but a significant proportion of these funds are held for capital builds and refurbishment. Trustees aim to hold between 3 and 6 months in free reserves. 2019 was an unexpectedly good year for fundraising producing a bigger than anticipated surplus, which in turn increased the level of free reserves. Consequently, a decision was taken to increase unrestricted expenditure for 2020, resulting in a deficit on unrestricted expenditure for the year. The deficit will be covered by free reserves. A modest surplus on unrestricted funds is anticipated for 2021.

Year end as at 31 DECEMBER	2018	2019	2020
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	22,215,000	25,094,000	25,645,000
- % of Income confirmed as at Nov 2019	N/A	82%	34%
Expenditure	(16,322,000)	(16,057,000)	(20,078,000)
Total surplus/(deficit)	<b>5,893,000</b>	<b>9,037,000</b>	<b>5,567,000</b>
Split between:			
- Restricted surplus/(deficit)	2,906,000	4,755,000	6,779,834
- Unrestricted surplus/(deficit)	2,987,000	4,282,000	(1,212,834)
	<b>5,893,000</b>	<b>9,037,000</b>	<b>5,567,000</b>
Operating Expenditure (unrestricted)	12,530,000	12,677,000	19,164,000
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	5,679,000	9,934,000	8,721,166
No of months of operating expenditure	5.4	9.4	5.5
Reserves policy target	3,132,000	3,169,250	4,791,125
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	2,547,000	6,764,750	3,930,041

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Applications Ordinarily Approved under Delegated Authority	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Decision</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report advises members of funds to be approved that would usually be approved under delegated but are presented instead to the Committee in order to be able to confirm the total grants awarded this financial year. Assessment reports for all grants recommended for approval under delegated authority within this report are provided in Annex 1. Note that these are provided in the standard delegated authority format, which is different to the usual grant assessment reports.

## Recommendation

Members are asked to:

- Approve 5 grant recommendations

## Main Report

1. This report requests approval for 5 grant recommendations which are for requests of between £50,001 - £100,000 and which would usually be approved under delegated authority. However, given the proximity to the financial year end, these have been presented for consideration today so that your decisions on all these requests can be made at the same time. This will allow CBT to draw a clear line on the total sum awarded this financial year.
2. It is also worth reminding Members that the thresholds for determining the levels of delegated authority which can be used are on the sum requested and not the sum recommended.

Scott Nixon  
Head of Director's office  
020 7332 3722, [Scott.nixon@cityoflondon.gov.uk](mailto:Scott.nixon@cityoflondon.gov.uk)

## Requests ordinarily approved under delegated authority (£100,000 or less)

Ref	Organisation	Grant Recommendation	Recommended Amount
15459 (21)	Just For Kids Law	£100,000 over three years (£45,000; £35,000; £20,000) of core support for JFKL's holistic casework in London, including rent and core expenditure.	£100,000
15699 (22)	Cripplegate Foundation	£95,000 over 2 further and final years (£40,000, £55,000) towards staffing and operational costs of the Saturday Socials older persons programme delivered through Islington Giving.	£95,000
15883 (23)	Rushey Green Timebank (RGTB)	£94,000 over 2 further and final years (£49,800, £44,200) towards the salary of a p/t (21 hpw) Co-ordinator and freelance sessional staff and associated costs of maintaining and developing the community green space.	£94,000
15722 (24)	Sound Minds	£63,000 over five years (£15,000; £14,000; £13,000; £12,000; £9,000) for core costs to underpin the successful running of the organisation through and beyond the recruitment and hand-over of a new CEO.	£63,000
15701 (25)	Wac Arts	£100,000 towards the capital costs of improved access facilities to the Old Town Hall.	£100,000
<b>Grand Totals</b>			£452,000

## **CITY BRIDGE TRUST – Delegated Authority (Requests £50k to £100k)**

### **ASSESSMENT CATEGORY: Bridging Divides - Advice and Support\Provision of advice and support**

**Just For Kids Law**

**Ref: 15459**

**Adv: Julia Mirkin**

**Amount requested: £100,000**

**Base: Islington**

**Amount recommended: £100,000**

**Benefit: London-wide**

**Purpose of grant request:** We are seeking a contribution towards the core costs of our holistic casework model, which combines legal advice and representation with direct advocacy and development opportunities.

#### **The Applicant**

Just For Kids Law (JFKL), founded in 2006, works with vulnerable children and young people in London, who have multiple and interrelated issues: 68% of JFKL's beneficiaries are from BAMER communities and 24% have a disability. JFKL's vision is for the legal rights and entitlements of all children and young people (CYP) to be respected and for the voices of CYP to be heard and valued. JFKL engages deeply with its beneficiaries, gaining their trust to ensure they are comfortable discussing challenging and personal issues. The holistic casework model, for which funding is requested, involves Youth Opportunities Workers and Youth Advocates working closely with the charity's legal team to provide a joined-up package of support and personal development opportunities in addition to legal representation. An analysis of comparable organisations nationally, carried out last year by the Boston Consulting Group, on a pro-bono basis, found the JFKL is the only organisation that combines advocacy and legal representation for CYP. JFKL has 22 full-time and 19 part-time staff; is supported by 40 volunteers and is based in Islington. It is also in receipt of funding through the Responding to the Resilience Risk initiative.

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

The 'Children and Young People's Services: Funding and Spending 2010/11 to 17/18' report, published by Action for Children, Barnardo's and the NSPCC, 700,000 children (37%) live below the poverty line. Centrepont data shows that 250,000 under 25s in London have stayed in an unsafe place with nowhere to call home. The five highest cuts to children's services nationally are in London, all of which are between 45 – 52%. 89% of the young people supported by JFKL in 2018 felt more positive about their futures afterwards. JFKL will support 950 CYP in London during the proposed 3-year funding period.

Youth Advocates work alongside young people, acting on their instruction and at their pace to design individual support packages, also informed by the legal team. JFKL's Youth Advocates encourage and support CYP to learn about their rights and entitlements and gain the confidence required to engage with authorities and the legal system. Legal representation is offered for issues involving benefits; housing; the duty of care and immigration. Youth Advocates offer CYP support with issues of school exclusion and access to medical treatment and learning support. Once stable, JFKL's Youth Opportunities Worker helps young people into employment and/or training, moving beneficiaries from surviving to coping and towards thriving. JFKL

also undertakes strategic work, involving youth-led campaigning; strategic litigation and policy influencing work, which is enriched by its direct work with beneficiaries.

### Financial Information

JFKL receives less than 10% of its turnover from statutory sources and has a diverse range of funders, including the Esmée Fairbairn Foundation; Trust for London; BBC Children in Need; Henry Smith and Lloyds Bank Foundation. A healthy surplus was achieved in 18/19. Forecasts for 2020 and 2021 have adopted a prudent and cautious approach, however, the organisation is aiming to secure unrestricted income from legal aid, training and donations, all less predictable than grant income. JFKL currently has a capacity-building grant from the Paul Hamlyn Foundation for £125K per year, which comes to an end in 20-21. JFKL's reserves are currently above their target, enabling it to cover any fluctuations in income in future years.

Year end as at 31 May	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	1,895,092	1,941,019	1,769,819
- % of Income confirmed as at	N/A	90%	60%
Expenditure	(1,718,919)	(1,838,778)	(1,761,200)
Total surplus/(deficit)	<b>176,173</b>	<b>102,241</b>	<b>8,619</b>
Split between:			
- Restricted surplus/(deficit)	91,925	46,227	17,406
- Unrestricted surplus/(deficit)	84,248	56,014	(8,787)
	<b>176,173</b>	<b>102,241</b>	<b>8,619</b>
Operating Expenditure (unrestricted)	710,040	871,620	743,787
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	402,716	458,730	449,943
No of months of operating expenditure	6.8	6.3	7.3
Reserves policy target	300,000	300,000	300,000
No of months of operating expenditure	5.1	4.1	4.8
Free reserves over/(under) target	102,716	158,730	149,943

### Recommendation

JFKL holds the Halsbury Legal Award for Law in the Community; it is a London Legal Support Trust Centre of Excellence and is Organisation of the Year for the Howard League for Penal Reform's Community Awards. A reference has been taken from the Paul Hamlyn Foundation, which awarded JFKL five years of funding. The holistic approach at the heart of JFKL's ethos renders elements of its support beyond your specifically stated funding priorities; however, it is precisely this breadth and flexibility, in your officer's opinion, that makes JFKL effective in supporting vulnerable young people, meeting your stated aim of 'address[ing] inequalities by funding good quality advice and support'.

***£100,000 over three years (£45,000; £35,000; £20,000) of core support for JFKL's holistic casework in London, including rent and core expenditure.***

Approved.....  
Chief Grants Officer

Approved.....  
Chair

Approved.....  
Deputy Chair

Date.....

Date.....

Date.....

## **CITY BRIDGE TRUST – Delegated Authority (Requests £50k to £100k)**

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital\Arts, sports, health and/or well-being projects for older people**

**Cripplegate Foundation**

**Ref: 15699**

**Adv: Kate Moralee**

**Amount requested: £94,960**

**Base: Islington**

**Benefit: Islington**

**Amount recommended: £95,000**

**Purpose of grant request:** Continuation funding for Islington Giving's successful Saturday Socials programme, offering opportunities for older people to participate in purposeful activities at times and in places they would otherwise struggle to access.

### **The Applicant**

Cripplegate Foundation aims to achieve change transforming the lives of the most disadvantaged residents of the borough using all its financial resources, people and networks. Islington Giving (IG) is a local giving scheme, sitting within Cripplegate Foundation, which has raised £6,426,363 and supported 73 groups since 2010.

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

In 2016 you awarded Cripplegate Foundation £141,000 over three years towards the delivery of IG's Saturday Socials programme of accessible weekend activities to help older people combat isolation, improve wellbeing and feel better connected. The services have been delivered by three separate organisations, each with a unique model and approach. This proposal builds on progress and evolution of the Saturday Social programme, which has now become a recognisable and regular programme that older residents are familiar with.

Responding to feedback from participants and a review of the programme, recommendations have informed development. The programme will now have a stronger focus on co-production and deeper engagement, which has grown out of the trust which has been built over the last 3-5 years. A mix of Saturday and weekday activities will be offered across a diverse range of venues and locations providing opportunities for older people to socialise at a time when they feel most isolated. It is ambitious in its desire to extend reach, both of participants and partners, with current partners including Emirates, Sadler's Wells, Central St Martins, local theatres, pubs and community centres.

One of the delivery partners is to take on a more formal convening role within the project, ensuring better coordination and collation of reporting on the impact of all three partners. All three partners aim to identify match funding to complement and grow what is currently being offered, which contributes towards future sustainability.

### **Financial Information**

Cripplegate Foundation has a permanent endowment of approximately £40m. The gains/losses (due to fluctuations in stock value) from this endowment have no impact on operational budget. Any endowment investment gains/losses and management fees impacts the capital endowment value only.

CF accumulates any unrestricted surplus (interest generated from endowment less/greater than expenditure) year on year and designates this to programme development. It then invests this in identified programmes when appropriate.

Year end as at 31st December	2018	2019	2020
	Signed Accounts	Draft Accounts	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	2,381,680	2,342,090	2,412,500
- % of Income confirmed as at 28/01/2020	N/A	N/A	81%
Expenditure	(2,222,700)	(2,244,322)	(2,507,000)
Permanent Endowment (capital) gains/losses	(1,428,501)	5,257,449	n/a
net gains/losses on investments	(75,184)	n/a	n/a
Total surplus/(deficit)	<b>(1,344,705)</b>	<b>5,355,217</b>	<b>(94,500)</b>
Split between:			
- Restricted surplus/(deficit)	(1,351,196)	5,075,457	(94,500)
- Unrestricted surplus/(deficit)	6,491	279,761	0
	<b>(1,344,705)</b>	<b>5,355,218</b>	<b>(94,500)</b>
Operating expenditure (unrestricted funds)	1,078,870	1,222,214	1,225,000
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	526,176	805,937	805,937
No of months of operating expenditure	5.9	7.9	7.9
Reserves policy target	500,000	611,107	612,500
No of months of operating expenditure	5.6	6.0	6.0
Free reserves over/(under) target	26,176	194,830	193,437

### Recommendation

This programme has delivered effectively over the past three years, creating meaningful opportunities for older people to build and deepen connections. The three delivery organisations have responded to feedback from and involvement by participants to further shape the delivery. This proposal meets the criteria of your Connecting the Capital programme and is recommended.

***£95,000 over 2 further and final years (£40,000, £55,000) towards staffing and operational costs of the Saturday Socials older persons programme delivered through Islington Giving.***

Approved.....  
Chief Grants Officer

Approved.....  
Chair

Approved.....  
Deputy Chair

Date.....

Date.....

Date.....

## **CITY BRIDGE TRUST – Delegated Authority (Requests £50k to £100k)**

### **ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital\Growing, greening and environmental projects**

**Rushey Green Timebank (RGTB)**

**Ref: 15883**

**Amount requested: £94,049**

**Adv: Kate Moralee**

**Base: Lewisham**

**Benefit: Lewisham**

**Amount recommended: £94,000**

**Purpose of grant request:** Continuation funding for developing and maintaining its community green space - The Wild Cat Wilderness

#### **The Applicant**

The Rushey Green Time Bank charity improves the wellbeing of individuals by enabling the local community to provide care and services for each other through a variety of activities that involve using people's skills and talents. As people start to help and get to know their neighbours, they rebuild a sense of trust and community belonging. It adopts an asset-based approach to involving people in volunteering to connect and create community cohesion. RGTB is well networked across the borough, has an excellent relationship with the Local Authority and attends a variety of forums, Boards and Consortium.

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

In 2017 you awarded RGTB £113,000 over three years towards the development of the Wild Cat Wilderness community green space in Catford, expanding both the size of, and range of local community members using, the site. RGTB has provided excellent and timely monitoring reports, been proactive in communication with your officer and responded effectively to changes during the last two years.

RGTB has strengthened its links with other local charities and groups and will be developing these further over the next two years. It has worked with Sydenham Garden to develop a pathway for people recovering from mental ill health transitioning from therapeutic session to community volunteering. It is currently developing relationships with Roar Pursuits CIC to provide opportunities for care leavers to be engaged with the project.

The budget is slightly higher than previously as RGTB have adopted a slightly different delivery model of Co-ordinator plus freelance sessional workers, to provide greater flexibility and ability to meet the increased demand for use of the site.

This project fully embraces City Bridge Trust's environmentally responsible value promoting environmental excellence through all of its activities – recycling, avoiding plastic, using natural light, reducing food waste, greening and growing redundant land and harvesting water.

Many of the activities delivered over the last three years have been driven by volunteers eg, a dye garden and the marketing of the chilli festival. The project has

adopted an Appreciative Enquiry model as part of the evaluation, this has provided real insight for planning. Feedback from users of the project includes:

“A year on now volunteering here, I am pleased that I was introduced to this place as an add-on from Sydenham Gardens”;

“I have enjoyed the social aspect and made friends. It has given me something to do reducing social isolation”;

### Financial Information

The charity is experiencing considerable growth and continues to diversify its portfolio of projects tailored to the needs and aspirations of the community. It is also adopting its new role of Voluntary Sector Infrastructure support in Lewisham. A three-year contract with the Local Authority awarded in 2019. The organisation is well managed and in a good financial position. Free reserves are slightly below the trustee's policy of 3-6 months of expenditure, however 75% of projected income for 2021 is already secured and RGTB will endeavour to increase unrestricted surplus.

Year end as at 31 March	2019 Examined Accounts £	2020 Forecast £	2021 Budget £
<b>Income &amp; expenditure:</b>			
Income	265,360	350,507	449,677
- % of Income confirmed as at 20/2/20	N/A	100%	75%
Expenditure	(279,577)	(320,909)	(436,789)
Total surplus/(deficit)	<b>(14,217)</b>	<b>29,598</b>	<b>12,888</b>
Split between:			
- Restricted surplus/(deficit)	(21,428)	27,758	0
- Unrestricted surplus/(deficit)	7,211	1,840	12,888
	<b>(14,217)</b>	<b>29,598</b>	<b>12,888</b>
Total Expenditure	279,577	320,909	436,789
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	84,639	86,479	99,367
No of months of expenditure	3.6	3.2	2.7
Reserves policy target	69,894	80,227	109,197
No of months of expenditure	3.0	3.0	3.0
Free reserves over/(under) target	14,745	6,252	(9,830)

### Recommendation

This programme has delivered effectively over the last three years, creating meaningful opportunities for people to deepen community connections. Whilst your policy is usually to award one grant to each organisation this application provides an exception as RGTB is the most appropriate agency to host Lewisham Local Giving, whilst also delivering its own projects.

***£94,000 over 2 further and final years (£49,800, £44,200) towards the salary of a p/t (21 hpw) Co-ordinator and freelance sessional staff and associated costs of maintaining and developing the community green space.***

Approved.....  
Chief Grants Officer

Date.....

Approved.....  
Chair

Date.....

Approved.....  
Deputy Chair

Date.....

## **CITY BRIDGE TRUST – Delegated Authority (Requests £50k to £100k)**

**ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital\Arts, sports, health and/or well-being projects for disabled people**

**Sound Minds**

**Ref: 15722**

**Amount requested: £63,000**

**Adv: Ciaran Rafferty**

**Base: Wandsworth**

**Benefit: Wandsworth**

**Amount recommended: £63,000**

**Purpose of grant request:** Sound Minds requires 5 year core funding to expand our arts and music services and facilitate a handover to a new Chief Executive.

### **The Applicant**

Sound Minds, based in Battersea, is a registered charity and a social enterprise which uses the arts (particularly music) to engage and improve the lives of people who have long term mental ill health. It has a long and strong track record for training, employing and building the confidence of people referred. The majority of staff originally accessed the organisation to receive the services they now help deliver, whilst the management committee/Board comprise many people who have been, or are, service users. The studios accommodate music rehearsal, recording and film-making facilities, a visual art facility and a theatre group. One aspect of their work and which you have funded previously – Canerows Peer Support – works with people in hospital prior to their discharge so they can better access the Studio provision when they are back in the community. The main focus of Sound Minds work for more than two decades is people with enduring mental health problems, such as schizophrenic illnesses and bipolar disorder.

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

This request, for core costs, is to enable the organisation to succession plan. The current CEO has been in post for many years (since soon after the organisation was established) and plans to retire in two years' time though after a period of gradually reducing his working hours. Trust funding, should you agree it, would enable the charity to recruit a new CEO sooner rather than later so that both the new and the outgoing postholders could have a significant handover period and enable the organisation to maximise accrued knowledge and expertise. Under the charity's business plan the current CEO would be retained in a part-time role to assist the new CEO and add some managerial capacity during the transition. The current manager also plays a significant role in project delivery and the idea is to use some of the funding to enable other staff to do this so that more time can be spent on developmental work (eg volunteer development).

### **Funding History**

In November 2014 you awarded a grant of £72,000 over three years for a p/t Project Worker and related costs of the Canerows project. This grant was successfully monitored.

## Financial Information

Ongoing funding from the local authority for 2020/21 had not been confirmed at the time of application but has been subsequently. Whilst reserves held currently are above the policy level the organisation will have some one-off capital costs to meet on the refurbishment of their premises in the year ahead. They also intend to use some of the reserves to develop a potential social enterprise activity as part of their plans to become less reliant on local authority funding.

Year end as at 31 March	2019	2020	2021
	Signed Accounts	Forecast	Budget
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	156,994	143,655	151,637
- % of Income confirmed as at 24/01/20	N/A	98%	47%
Expenditure	(159,616)	(146,846)	(153,242)
Total surplus/(deficit)	<b>(2,622)</b>	<b>(3,191)</b>	<b>(1,605)</b>
Split between:			
- Restricted surplus/(deficit)	0	(2,400)	(4,992)
- Unrestricted surplus/(deficit)	(2,622)	(791)	3,387
	<b>(2,622)</b>	<b>(3,191)</b>	<b>(1,605)</b>
Operating Expenditure	159,616	146,846	153,242
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	140,742	139,951	138,346
No of months of operating expenditure	10.6	11.4	10.8
Reserves policy target	79,808	73,423	76,621
No of months of operating expenditure	6.0	6.0	6.0
Free reserves over/(under) target	60,934	66,528	61,725

## Recommendation

This is a stable and well-managed organisation working consistently well with a significant cohort of disadvantaged people. It is true to say that it is managed by people with lived experience and has significant impact as a result. The proposal is evidence of their desire to ensure that the organisation can be sustainable and their approach to forward-planning is commendable. A grant is advised:

***£63,000 over five years (£15,000; £14,000; £13,000; £12,000; £9,000) for core costs to underpin the successful running of the organisation through and beyond the recruitment and hand-over of a new CEO.***

Approved.....  
Chief Grants Officer

Approved.....  
Chair

Approved.....  
Deputy Chair

Date.....

Date.....

Date.....

## **CITY BRIDGE TRUST – Delegated Authority (Requests £50k to £100k)**

### **ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital\Access improvements to community buildings\Capital works**

**Wac Arts**

**Ref: 15701**

**Amount requested: £100,000**

**Adv: Ciaran Rafferty**

**Base: Camden**

**Amount recommended: £100,000**

**Benefit: Several London boroughs**

**Purpose of grant request:** Wac Arts will improve accessibility for our intergenerational and disabled community, creating new spaces for creative and social connectivity while opening our building with additional lifts and step free entrances.

#### **The Applicant**

Wac Arts, a charity, was established in 1974 to provide a range of activities and programmes for the local community not least disabled young people. Based in the old Town Hall building on Haverstock Hill it offers fully inclusive arts-based programmes that celebrate diversity and inclusion. Its provision and support for older people is also significant and includes the largest university of the Third Age. The premises are used 7 days per week, all year round and form a very important community hub in an area which may appear to be well-heeled but which has many social housing estates and pockets of significant disadvantage.

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

The application is for capital costs towards making the 140 year-old, grade II listed, building more accessible (Wac Arts has an 80 year lease). The access works have been informed by a comprehensive independent access audit and your officer visited the premises and was taken through the proposed works step by step. Whilst a lot of the building complex is accessible there is clearly room for improvement and for refashioning some of the interior layout to make it easier to navigate and to enable more interaction between the different groups who use the facilities. The access works form part of a bigger renovation and improvement project, which in total would cost c.£3.2m. Of this £3m is currently being considered by other funders, including the GLA (£1.5m) and the Heritage Lottery. Their support is likely and should be confirmed by April 2020. Your funding, should you agree it, will help in this regard.

#### **Financial Information**

The organisation has a history of overspending over recent years which has depleted its free reserves. Some of this has been as a result of a Diploma programme which the charity ran and which was a regular loss-maker. This has now been stopped and replaced with a new course which generates a surplus. The Board also appointed a new Chief Executive in mid 2019 who has considerable commercial expertise and is in the process of working with the Board on a realistic and sustainable business plan to increase free reserves and to reverse the overspending trend. The CEO has also reduced staffing costs, implemented a new staffing structure and appointed an experienced Strategic Financial Advisor. The organisation's balance sheet is positive, largely through its significant fixed asset

holding, and although there is scope to borrow against the assets the charity has been cautious to date and has worked closely with Triodos and the Co-operative Bank, both of which are supportive of the direction in which the charity is now moving. The aim is for the charity to break even on its unrestricted reserves by the end of the 20/21 financial year. Given that this is a proposal for capital works and your funding is released retrospectively and on receipt of invoices or equivalent when the work is done, a grant would not be unduly risky.

Year end as at 30 September	2018	2019	2020
	Signed Accounts	Draft	Forecast
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	2,025,225	2,054,683	2,712,667
- % of Income confirmed as at 21/1/20	N/A	100%	65%
Expenditure	(2,123,543)	(2,222,592)	(2,259,370)
Total surplus/(deficit)	<b>(98,318)</b>	<b>(167,909)</b>	<b>453,297</b>
Split between:			
- Restricted surplus/(deficit)	(175,658)	0	603,177
- Unrestricted surplus/(deficit)	77,340	(167,909)	(149,880)
	<b>(98,318)</b>	<b>(167,909)</b>	<b>453,297</b>
Operating Expenditure	2,123,543	2,222,592	2,259,370
<b>Free unrestricted reserves:</b>			
Free unrestricted reserves held at year end	(5,220)	(173,129)	(323,009)
No of months of operating expenditure	0.0	-0.9	-1.7
Reserves policy target	530,886	555,648	564,843
No of months of operating expenditure	3.0	3.0	3.0
Free reserves over/(under) target	(536,106)	(728,777)	(887,852)

### Recommendation

**£100,000 towards the capital costs of improved access facilities to the Old Town Hall.**

Approved.....  
Chief Grants Officer

Approved.....  
Chair

Approved.....  
Deputy Chair

Date.....

Date.....

Date.....

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Applications Recommended for Rejection	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Decision</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report and the accompanying schedule outline a total of **16** grant applications that, for the reasons identified, are recommended for rejection. All of these applications were under Bridging Divides criteria.

## Recommendation

Members are asked to:

- Reject the grant applications detailed in the accompanying schedule

## Main Report

1. There are 16 applications recommended for rejection at this meeting. They are listed within categories in the accompanying schedule. In each case the “purpose” that is used to describe the application is that provided by the applicant organisation. All the recommendations are based on criteria set out in your Policy Guidance.
2. Copies of these application forms are available electronically. If any Committee Member wishes to query any of the recommendations, this can either be done at the meeting, in which case the decision may be deferred while full details are provided to the Member concerned, or by contacting the Trust office in advance of the meeting so that an explanation can be provided prior to or at the meeting.

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## Grants Recommended for Rejection

Request Date	Ref	Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Funding Manager	Area
<b><u>Bridging Divides</u></b>							
<b><u>Advice and Support</u></b>							
December 2019	15902	Free The Forgotten Org	The organisation tackles social problems faced by vulnerable social groups. Free The Forgotten is a non-profit registered organisation and provides help to those isolated and those who are in need.	Organisation is a company but is not registered with the Charity Commission (which you require) and was also unable to provide 1 year's accounts at the time of application.	£15,000	Matthew Robinson	Brent
October 2019	15723	Haringey Somali Community and Cultural Association	To offer a free debt and financial advice to prevent service users' debt problems spiral into unmanageable debt.	Although this request for a specialist Debt Advisor seems to be logical, the request is over the City Bridge Trust's threshold for funding (at more than 50% of the organisations income). In addition, the organisation may wish to consider improving its financial controls and procedures, reviewing its safeguarding processes and gathering evidence of demand for the project, and outcomes from its work, to strengthen a smaller future application.	£201,674	Rachel Billett	Haringey
September 2019	15683	St Cuthbert's Centre	We require core-funding to continue building an inclusive community with our high-quality lunch service which channels the power of donated food, otherwise destined for the landfill, to feed vulnerable people.	The outcomes presented in the application relate to social isolation and employment rather than Food Poverty for people who are vulnerable and experiencing homelessness. This application does not specifically provide services for people experiencing homelessness and mental health issues adopting a trauma informed approach, thus not meeting your Homelessness Priority area under Positive Transitions.	£120,000	Kate Moralee	Kensington & Chelsea

Request Date	Ref	Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Funding Manager	Area
<i>Total Advice and Support (3 items)</i>					£336,674		
<b>Connecting the Capital</b>							
October 2019	15757	Holy Mission Guru Nanak	Improve the impact of our weekly luncheon club, creating a Senior Support Hub to improve emotional, physical and social wellbeing for older people otherwise isolated by cultural and languages barriers.	The organisation holds almost 3 years' worth of expenditure in free reserves and could therefore manage to fund this proposal from its own funds.	£110,889	Jenny Field	Barnet
December 2019	15903	Mouth That Roars	An inclusive media arts outreach & employment support programme for young people on the autistic spectrum and with learning differences - increasing active participation, independence, and reducing social isolation.	Whilst the applicant is a private limited company with social goals, it is not a registered charity despite a turnover greater than £5,000. As such the Trust does not regard the applicant as a charitable company and it is ineligible for funding.	£185,328	Tim Wilson	Hackney
October 2019	15861	St George the Martyr, Holborn	The church is planning a significant restoration and we want to ensure we are DDA compliant and fully accessible to all visitors in the future.	There is an insufficient level of community use of the premises, and the church could use its own reserves to fund an access audit.	£1,594	Sandra Davidson	Camden
November 2019	15887	Wimbledon Foodbank	To address the 40% increase in demand for food by implementing more than food projects and appointing a full time Project Manager to oversee and develop these new projects.	The application and supporting documentation fall short of the good practice standards that the Trust would expect for a proposal of this nature. The applicant organisation is not a legally constituted body.	£255,000	Kate Moralee	Merton
<i>Total Connecting the Capital (4 items)</i>					£552,811		

Request Date	Ref	Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Funding Manager	Area
<b>Positive Transitions</b>							
October 2019	15770	Carers Lewisham	To offer practical supports, signposting, and respite for carers 5-25.	An extremely poor application where several elements of the financial information required are incomplete or illogical. The charity has a history of later returns to the Charity Commission.	£180,600	Ciaran Rafferty	Lewisham
November 2019	15897	Communities Welfare Network	We are seeking funding to improve the English skills of newly arrived Migrants and Refugees to facilitate their integration	The application contains conflicting information on key issues which has made it difficult to undertake a valid assessment.	£21,449	Sandra Davidson	Lambeth
October 2019	15752	Faith Regen Foundation	To support 210 women (in 3 years) who are exiting domestic abuse (DA) relationships through advice, support groups, workshops, progression to, become empowered, independent and have danger-free futures.	The applicant does not demonstrate sufficient specialist expertise in this area of work, which you require.	£149,916	Kate Moralee	Tower Hamlets
October 2019	15764	Minds Ahead	To bring about and then support the roll out of a new mental health programme for colleagues working in schools: the school mental health specialist PGDIP.	The organisation has little or no unrestricted reserves and the proposal does not strongly support your programme: Specialist support services working with children and young people. Funding cannot be recommended.	£41,350	Geraldine Page	Lewisham
December 2019	15871	Purley Bury Tennis Club Charity number 1176144	I am requesting funding to provide and continue LTA qualified coaches to deliver tennis coaching sessions free to disabled people of all ages, regardless of their ability.	The organisation has sufficient reserves to fund this project having reviewed the financial information available.	£15,700	Sandra Davidson	Croydon

Request Date	Ref	Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Funding Manager	Area
January 2020	15941	The Reasons Why Foundation	Over 4 years 490 ex-offenders will receive at least 12 months specialist intervention, helping them overcome disadvantage, become more independent and increasing their resilience and ability to make positive choices.	The application was deemed high risk due to a low level of reserves. It was also noted that from the information provided by the applicant, the CEO's salary appears high in relation to the organisation's turnover, with a £1,090 salary increase budgeted for each year of funding.	£49,000	Sandra Davidson	Lambeth
May 2019	15500	Somali Advice & Development Centre	To divert Somali young people aged 11-21 years old away from knife crime, gang culture, youth violence, sexual exploitation and radicalisation	Your Officer is not convinced the organisation has the relevant skills and experience to deliver this type of specialist project.	£227,550	Shegufta Slawther	Ealing
November 2019	15890	Track Academy	Skillbuilders supports young people develop 10 core transferable lifeskills through a youth engagement project using athletics and multisport activities as its medium.	The organisation has little or no reserves and this proposal does not meet your priorities as it is for young people in general, rather than targeted at your priority groups.	£151,500	Ciaran Rafferty	Brent
July 2019	15575	Women's Resource Centre	Continuation funding towards the sustainability of the London VAWG Consortium, the largest pan-London coalition of specialist VAWG providers.	Monitoring of the most recent grant has flagged a number of issues, not least of which was the demonstration of the capability of the organisation to manage the grant to a satisfactory standard.	£149,710	Kate Moralee	Islington
<i>Total Positive Transitions (9 items)</i>					£986,775		
<b>Grand Totals</b>					£1,876,260		

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Funds approved or declined under delegated authority	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report advises members of funds approved under delegated authority since your last meeting.

## Recommendation

Members are asked to:

- Receive this report and note its contents

## Main Report

Following the approval of the Court of Common Council on 12th September 2019, the CGO may make decisions on applications up to £50,000.

Decisions on applications of between £50,001 and £100,000 may be made by the CGO in consultation with the Chair and Deputy Chair, with reference to the Chamberlain.

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

Applications considered comprise Investing in Londoners, Bridging Divides, Small Grants and Stepping Stones programmes.

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## Requests approved under delegated authority (£100,000 or less)

Ref	Organisation	Disposition Date	Grant Recommendation	Recommended Amount
15366	Big Red Bus Club Charlton	20/01/2020	£29,500 over three years (£10,200; £9,600; £9,700) towards the staffing and related running costs of pre-entry level group ESOL stay and play sessions for parents of under-fives.	£29,500
15758	BritSom	26/03/2020	£44,000 over 2 further and final years (£22,000 x2) for the salary of the part-time Women's Support Worker (15hpw) and for the costs of delivering ESOL Classes to Entry-level and level 1 standard.	£44,000
15771	Chaos Theory	10/03/2020	£89,900 over two further and final years (£44,300; £45,600) for a full time Senior Violence Interrupter and associated running costs.	£89,900
15411	Disability Law Service	20/01/2020	£100,000 over five years (£30,000; £25,000; £20,000; £15,000; £10,000) towards core costs. This funding is for a maximum of one third of the organisation's unfunded core costs, reflecting the proportion of its beneficiaries that are Londoners, which is c.30%.	£100,000
15884	Docklands Sailing Centre Trust	26/02/2020	£2,520 to meet the costs of an access audit along with the provision of 1-day disability equality and awareness training for staff.	£2,520
15866	ETNA Community Centre	05/03/2020	£5,000 for an access audit.	£5,000
15283	Free2B Alliance CiC	20/01/2020	£93,760 over 5 years (£12,880; £13,000; £22,390; £22,600; £22,890) for the salary, travel, management and clinical supervision costs for the Free2Talk service for young Londoners.	£93,760
15382	Havering Theatre Trust Limited	10/03/2020	£100,000 towards capital access improvements to the public foyer, entrance, auditorium, backstage, and learning and participation areas.	£100,000

<b>Ref</b>	<b>Organisation</b>	<b>Disposition Date</b>	<b>Grant Recommendation</b>	<b>Recommended Amount</b>
15609	Kentish Town Community Centre	03/03/2020	£31,000 over two years (£15,500 x 2) towards the costs of a Support Worker, Project Manager and related resources for Kentish Town Community Centre's weekly classes for older people.	£31,000
15219	Leaders in Community (LiC)	05/03/2020	£2,000 (5 days) to provide an eco-audit from 3 Acorns	£2,000
15566	Macular Disease Society	20/01/2020	£85,000 over three years (£45,000; £25,000; £15,000) towards the salary and on-costs of a London Regional Manager (37.5hpw), volunteer costs, direct management and related running costs.	£85,000
15705	The Parochial Church Council of the ecclesiastical parish of St James and St John with St Peter, Clerkenwell	21/01/2020	£4,500 to commission Access=Design for an independent access audit and design appraisal. The grant must be paid to an account with a minimum of two signatories.	£4,500
15721	Pleasance Theatres Trust Ltd	21/01/2020	£2,500 towards the costs of an access audit and equalities training for Pleasance Theatres Trust's Islington site.	£2,500
15620	Sported Foundation	10/03/2020	£275,000 over three years (£94,000, £85,000, £96,000) toward the salaries of the Project Manager, Regional Manager, and Member Engagement Manager (with no more than 50% of the annual grant going on salaries), plus evaluation and other running costs to launch the Connected Communities London model.	£275,000
15703	Talitha Arts	26/03/2020	£6,700 for the part-time salary of an Artistic Director to deliver therapeutic arts sessions to aid the recovery process for traumatised women.	£6,700
15645	Upswing Aerial Limited	11/02/2020	£96,000 over three years (£30,500; £38,000; £27,500) for Homemade Circus workshops in residential care homes and to update an associated Toolkit.	£96,000
<b>Grand Totals</b>				<b>£967,380</b>

## Requests rejected under delegated authority

Ref	Organisation	Date Declined	Grant Recommendation	Requested Amount
15914	Artsadmin	31/01/2020	Organisation has already received an eco-audit from the Trust in 2016.	£0
15970	Bromley Baptist Church	06/02/2020	The organisation's free reserves are well in excess of the Trustees' policy - they should fund themselves.	£0
15546	The Chartwell Cancer Trust	14/02/2020	This proposal is recommended for rejection as there were issues around the governance of the organisation (a charity) and its payment authorisation systems. One of the paid employees is also a trustee, which appears to conflict with the governing document; and payments are authorised by a single employee with no system in place for additional scrutiny or approval by trustees.	£29,500
15918	Equalities Work	26/03/2020	Grant request for £30k for one year is more than 50% of the organisation's annual turnover.	£30,000
15915	EXPRESS TUITION LTD	26/03/2020	This application does not meet the priorities of your Small Grants programme. Request to meet costs of delivering ESOL classes. The organisation is not a registered charity.	£9,962
15973	Sir Walter St John's Educational Charity	06/02/2020	Organisation has short lease and is hosted by a school, which will limit the scope of the eco-audit.	£0
15935	Tropical Health and Education Trust (THET)	06/02/2020	Ineligible as the organisation's work does not benefit the inhabitants of Greater London.	£0
<b>Grand Totals</b>				<b>£69,462</b>

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Withdrawn & Lapsed Applications	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

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

## Recommendation

Members are asked to:

- Receive this report and note its contents

Scott Nixon  
Head of Director's office  
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## Withdrawn or Lapsed Applications

ID	Organisation	Purpose of Request	Withdrawn / Lapsed Reason
			<u>Withdrawn</u>
15329	Harrow Mencap Group	Engaging 100 marginalised disabled people (per year) with consistent sports and social activities, life skills development and sustainable peer support, improving health, wellbeing and independence.	Lapsed request. Despite repeated requests the applicant has not provided information to progress the application.
15637	The International Centre for Integration and Cohesion (ICIC)	Providing capacity-building training to community leaders to improve cohesion, communication and leadership skills and crystallise these individuals within the London Leaders? Strength and Resilience Network	Following discussion with your Officer, the applicant has decided to withdraw. A revised proposal is anticipated.
15365	The Log Cabin Charity	To provide counselling, thereby improving mental health, for young people aged 14 -25 who have disabilities or additional needs or who are in need	The organisation has not provided your Officer the requested information within a reasonable timeframe.
15237	Midaye Somali Development Network	Midaye Women's Well-being Club will provide a safe space for BME migrant women to discuss problems and support each other, learning about mainstream services and how to access them.	The organisation has not been able to provide the information requested by your Officer within a reasonable timeframe.
15603	Shared Assets	To enable London based food growing projects and individuals to participate in, and benefit from, an international research project into peri urban farming.	A July application for work delivered at a conference two months later. It was not possible to complete the final assessment within this short timeframe, so the applicant had decided to withdraw its application.
15692	Translating & Interpreting Service (TIS)	To ensure people from migrant & refugee communities excluded from mainstream ESOL classes will learn English, access community services, integrate socially and progress along personal development pathways.	Application cannot be considered until Nov 2020. Outcomes closely aligned to recent grant and therefore cannot be considered due to two year rule.

<b>ID</b>	<b>Organisation</b>	<b>Purpose of Request</b>	<b>Withdrawn / Lapsed Reason</b>
15390	Urban Growth Learning Gardens	To continue improving a therapeutic, educational community garden, where trainees & volunteers learn about the natural world, themselves & each other, as they grow food & flowers to distribute locally.	Applicant has decided not to proceed with project.
15335	Voluntary Action Islington Limited	To help local organisations become more sustainable and better prepared for partnership working, through the provision of training, consultancy and resources to senior managers and staff.	The organisation has not provided the information requested by your Officer within a reasonable timeframe.
15971	Nafsiyat Intercultural Therapy Centre		Withdrawn - the lease is only 18 months.
15932	Community Energy London	Supporting more Londoners to set up their own community energy projects across the city.	Application withdrawn following advice from your Officer.
15896	The Curiosity Project CIC	To tackle food poverty and build community resilience in South Norwood	Application does not meet priorities of your Advice & Support funding priority. Applicant has withdrawn application and is considering applying for funds on Small Grants programme.
15704	The Gate Theatre Company Ltd	Funding to support an area search and feasibility study that will enable the Gate to identify new premises from which to deliver stronger outcomes for our local community.	Following advice from your officer, the organisation has withdrawn its application and is expected to re-submit once it has done further work on its building plans.

*Total Withdrawn (12 items)*

**Grand Totals (12 items)**

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Variations to Grants/Funds Awarded	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Scott Nixon, Head of Director's Office	

## Summary

This report informs Members of grants where variations have been agreed by the CGO since your last meeting.

## Recommendation

Members are asked to:

- Receive this report and note its contents

## Main Report

Since your last meeting, variation to the grants outlined below have been agreed by the CGO, in line with the revised delegated procedure for the amendment of grants as previously agreed by your Committee.

### **London School of Mosaic**

This organisation received £5,000 for an access audit in September 2019. Not all of these funds were required so a sum of £2,597 has been revoked.

### **198 Contemporary Arts & Learning**

£3,660 was awarded for an access audit in September 2019 though the eventual invoice was for £3,159. The balance of £501 has been revoked.

### **Voluntary Action Lewisham**

In January 2019 you agreed £100,000 over two years to continue VAL's work supporting small BME organisations in the borough. Later that year the organisation was informed that its major funding from the local authority would not be renewed. As a result the charity has decided to merge with another charity, based in Greenwich, from 1<sup>st</sup> April 2020. As the local authority has funded another organisation in Lewisham to deliver support services in the borough it would not be appropriate for your funding to continue to VAL for a similar role, hence the final year's grant of £50,000 has been revoked. The organisation has been kept fully informed of this approach throughout.

**Several Organisations – The Roundhouse Trust; Chicken Shed Theatre Trust; Age UK Kensington & Chelsea; Orchestras for All; National Portrait Gallery; Museum of London**

On various dates between November 2014 and March 2016 you awarded each of the above a grant of £2,000 (£4,000 in the case of the national Portrait Gallery) as part of your programme to support paid apprenticeships in the arts (in conjunction with Arts Council England). The above organisations have never drawn down their funding and, given the time that has elapsed since then, these funds – totalling £14,000 - have now been revoked.

**Almeida Theatre Company Ltd**

A grant of £4,079 was awarded in September 2019 for an access audit of which £3,000 was the sum actually needed therefore the balance of £1,079 has been revoked.

Total sum revoked: £68,177

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<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Strategic Initiative Progress Report – GLA/Young Londoner’s Fund	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report authors:</b> Ciaran Rafferty, Funding Director	

## Summary

This report provides a progress update on the Young Londoners Fund strategic initiative delivered in partnership with the Greater London Authority. The report covers your funding to the GLA to assist with their delivery of network support to YLF grantees. Elsewhere in your papers is a separate report of the YLF in its totality over year 1 of its operation.

## Recommendation

Members are asked to:

- Receive this progress report and note its contents.

Ciaran Rafferty  
Funding Director  
[Ciaran.Rafferty@cityoflondon.gov.uk](mailto:Ciaran.Rafferty@cityoflondon.gov.uk)

## **CITY BRIDGE TRUST – Strategic Initiative progress report**

**Greater London Authority - Young Londoners Fund      Ref: 15197**

**Grant Amount: £300,000**

**Purpose of grant:**

£300,000 towards the costs of commissioning charitable organisations to provide sub-regional networking and multi-agency co-ordination of Young Londoners Fund projects.

**Project Start Date:** February 2019

**Projected End Date:** February 2022

**Please summarise your progress to date, specifically focusing on the key outcomes and impact of the project:**

We have established YLF Local Networks covering every London borough, to support over 200 Young Londoners Fund (YLF) grantees and the wider youth sector. We have built on existing VCS and youth networks to provide YLF fund-holders and organisations planning to apply to the YLF with access to advice and support on how to achieve their objectives and outcomes. YLF Local Networks are funded for three years from January 2019 with City Bridge Trust contributing £300,000 and the GLA £830,000. [www.london.gov.uk/ylf-networks](http://www.london.gov.uk/ylf-networks)

We have:

1. Grant funded 11 YLF Local Networks and 8 Young People's Foundations (through John Lyons Trust) to build networks with community organisations working with young people in London. Aims are to:

- help generate proposals for round 2 of the fund and support potential bidders;
- ensure that young people are effectively and appropriately engaged in developing proposals and delivering activities;
- promote YLF activities to young people in their locality;
- share best practice between Young Londoners fund-holders to develop sustainability; and
- provide a network for organisations supporting young people to work collaboratively.

2. Their key priority in this year was to support YLF round 2 commissioning which invested £15 million in positive activities for young people. 35 Information Sessions were held across London compared to six sessions prior to YLF round 1. Sessions were hosted and led by the YLF Local Networks to support organisations to understand the fund requirements and application process. This was underpinned by one to one support provided to community groups. Over 500 applications were made. Those organisations that decided the Fund was not appropriate for them were given support to identify alternative funding.

3. YLF Local Networks also established local meetings, some focused on YLF grantees in their area, others that brought together YLF and non-YLF grantees who

support young people. Sessions provided opportunities to identify and provide training to youth organisations, shared knowledge and learning, and facilitated collaboration. Partnership development, including building links with statutory agencies and referrals is also prioritised. Youth organisations have access to free training through the YLF Local Networks core offer.

4. YLF Local Networks provided a bespoke offer to help ensure their successful project delivery. Training needs were assessed and used to inform discussions with London Youth and the Centre for Youth Impact, who also support YLF grantees. All of the YLF Local Networks fed back training needs to the Partnership for Young London (PfYL) to inform their YLF training programme (which is also funded by City Bridge Trust). Several networks have worked with PfYL, London Youth and Centre for Youth Impact to deliver local training and support sessions.

5. A GLA led Local Networks Forum has been established to share learning. across the Local Networks. London Youth, Centre for Youth Impact and Partnership for Young London also participate, which has enabled us to align and coordinate the offer to YLF grantees and the wider youth sector in London.

**Thinking about the past year of your grant - please describe the differences or outcomes the work you have delivered has achieved.**

The core offer provided by each YLF Local Network is tailored to each locality, reflecting differences in the youth sector infrastructure, relationships between the community and voluntary sector and statutory agencies, and levels of youth violence, deprivation and wider socio-economic issues. Analysis of the round 1 YLF investment in different parts of the capital informed the round 2 commissioning strategy and the work of the YLF Local Networks. Where investment was low, compared to youth violence and other indicators of need, we highlighted this with YLF Local Networks who stepped up their dissemination and support in those localities.

In addition, YLF Local Networks attended borough visits with GLA staff and borough community safety and youth leads to ensure Round 2 of the YLF was informed by local priorities and needs and boroughs could refer local youth organisations to the YLF Local Networks for support.

Local YLF Network teams have also worked to improve links between community and voluntary organisations and key agencies through joint training and networking sessions, and representation at strategic meetings.

Feedback from YLF grantees show they particularly value the YLF Local Networks offer to get to know other youth organisations delivering in their area and opportunities for joint working or cross referrals.

CASE STUDY: Hounslow and Hillingdon Local Network have sought to build relationships with community organisations supporting young people and their families. For example, H4All, Hillingdon Youth Council and Hillingdon Adult Learning Centre who run local Community Partnership Board meetings have been working

with their YLF Local Network to promote the YLF work and activities. Hounslow and Hillingdon YLF Local Network will provide joint safeguarding training with H4All to community organisations and will also support them with capacity building and funding.

**CASE STUDY:** The HEY YLF Local Network covering Haringey and Enfield delivered a County Lines training session for professionals in Haringey and Enfield. The session included attendance from two officers from Homes for Haringey (Haringey's Council Housing team) and the police. The police subsequently funded additional training sessions in Haringey and Enfield for parents and carers, and Homes for Haringey commissioned the trainer to train their staff teams on estates in the borough.

**Did you face any challenges with your CBT funded project and if so, what action have you taken?**

1. The YLF Local Networks were established after the first YLF grants had been awarded and engagement with the Networks is not mandatory. Due to limited capacity in some community organisations this has resulted in slow take up of their offer in some London boroughs. This is specifically the case with Pan-London projects which span across YLF Local Networks. YLF Local Networks have also reported varying engagement with London boroughs.

In November 2019, the GLA hosted a 'Meet Your Local Networks' event at City Hall for round 1 and 2 grantees, which provided an opportunity to find out more about the offer and connect with other YLF grantees. This event was attended by more than 150 organisations.

We have included a question in the YLF grantee quarterly and annual monitoring claims asking about the support that the project has had from their local network. Analysis of their feedback has informed wider communications to YLF grantees and to the YLF Local Network leads. YLF contract managers also refer YLF grantees who need further support to their YLF Local Network.

2. The YLF Local Network offer is open to all youth sector organisations. However, Project Oracle evaluation support, London Youth Quality Mark and PfYL Training Offer is restricted to YLF grantees (and those that applied to YLF). This has presented a challenge for groups that are not funded under YLF and Networks with fewer YLF grantees. We have worked with London Youth, PfYL and the Centre for Youth Impact to coordinate the wider offer.

Additionally, the GLA has provided a small amount of funding (£25k) through the Mayor's Office for Policing and Crime, to provide additional capacity building support. This funding will extend the offer to groups not funded by YLF.

3. There have been some staffing/governance changes within two of the YLF Local Networks. We have worked with them to understand the issues and determine the forward strategy to reduce the impact on the service offer to youth organisations.

**What are your plans for Years 2 and 3:**

Years two and three will focus on impact and sustainability of YLF funded activity and support for the wider sector:

1. We will continue to share learning across YLF Local Networks through the quarterly Local Networks Meetings. Relationships have been developed between local networks leading to resources and learning being shared across and between Local Network areas. The GLA has established a YLF Advisory Group to support the strategic direction of the programme and any future investment in young people's activities in London. The Local Networks will be represented at the Advisory Group.
2. Support YLF grantees to meet their outcomes and targets, including achievement of the London Youth Quality Mark and Project Oracle evaluation standard 1. To work with projects to help them overcome any local delivery challenges they face and to further shape and promote the PfyL training offer.
3. Explore and build on local methods for evaluating impact, including appointing a programme level evaluator. This includes supporting the YLF Local Networks to assist youth organisations to sustain their services beyond the funding and to further support those not funded by YLF.

**Who benefited from your City Bridge Trust funded project or activities?**

How many organisations benefited directly from your City Bridge Trust grant this year?

869

In which Greater London borough(s) did your beneficiaries live? Please include the relevant percentages, ensuring that the total is exactly 100%.

869 = total youth org supported (including those attending YLF R2 Network Info Sessions)

Barking & Dagenham/Havering: 7%

Bexley/Bromley: 7%

Croydon/Sutton: 7%

Enfield/Haringey: 14%

Greenwich/Lewisham: 6%

Hackney/Islington: 4%

Hounslow/Hillingdon: 7%

Lambeth/Southwark: 7%

Merton, Wandsworth, Kingston & Richmond: 7%

Newham/Tower Hamlets: 5%

Redbridge/Waltham Forest: 14%

West London Young People's Foundations: 15%



<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	26 <sup>th</sup> March 2020
<b>Subject:</b> Report on Learning visits	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Jemma Grieve Combes (Head of Impact and Learning)	

## Summary

This report introduces learning visit reports for PACE and Small Charities Coalition.

## Recommendation

Members are asked to:

- Receive this report and note its contents.

## Main Report

1. You receive learning visit reports at each of your meetings. The reports to this Committee are from visits to:

### PACE

**Programme Area & Outcomes:** Making London More Inclusive

- a) Disabled people actively taking part in the arts or sport
- b) Disabled people reporting increased well-being as a result of taking part in the arts or sport

### Small Charities Coalition

**Programme Area & Outcomes:** Strengthening London's Voluntary Sector

- a) More organisations with improved capabilities in monitoring, evaluation and impact reporting
- b) More organisations with improved skills in financial management

Ruth Feder / Jemma Grieve Combes  
Heads of Impact and Learning

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**Learning visit report**  
**Small Charities Coalition 14143**

<b>1.1 Date of visit:</b> 05/02/20	<b>1.2 CBT representatives:</b> Jemma Grieve Combes William Hoyle	<b>1.3 People met with:</b> RC
<b>1.4 Programme Area &amp; Outcomes:</b> Strengthening London's Voluntary Sector <ul style="list-style-type: none"> <li>• More organisations with improved capabilities in monitoring, evaluation and impact reporting</li> <li>• More organisations with improved skills in financial management</li> </ul>		
<b>1.5 Purpose of the award:</b> £100,000 over 2 years for the delivery of the Building Resilience programme in London.		
<b>Grant start date:</b> 01/10/2017		<b>Grant end date:</b> 01/10/2019
<b>Project progress and difference made</b>		
<p><b>2.1 Project Outcome 1:</b> Charities in London will have increased skills, knowledge and confidence in different areas and will be more confident to apply their learning.</p> <p><b>2.2 Project Outcome 2:</b> Charities in London will be better equipped, more informed and have gained more connections to support their charity.</p> <p><b>2.3 Project Outcome 3:</b> Charities in London will be stronger, more resilient, have increased sustainability and be better governed.</p> <p><b>Progress made:</b> Over the last 2 years SCC has:</p> <ul style="list-style-type: none"> <li>• Run 88 training sessions on a range of topics including fundraising, marketing and comms, GDPR and HR.</li> <li>• Made 95 mentoring matches, the most common requests for support were for fundraising, strategy and planning and bid writing skills.</li> <li>• Responded to 1144 email and telephone enquiries, the most common queries regarded setting up and registering a new charity, governance and finance.</li> </ul> <p>The charity has a range of feedback mechanisms in place to understand the difference it makes. For example, in year 1 80% of charities said they improved their understanding of the subject in a training session and 79% of charities reported enhanced skills and knowledge in the subject area following mentoring. It regularly surveys its members through longer surveys and vox pops to ensure it is meeting needs.</p>		
<b>Impact and learning: CBT comments</b>		
<p>We met with the CEO at the organisation's offices in Lambeth at the end of its 2-year grant.</p> <p><b>1. Impact:</b> The Small Charities Coalition is a small organisation with a big reach. The work funded by CBT has been important in providing bespoke support and advice to small and emerging charities which may not have their needs met by more generic services.</p> <p>The organisation has seen a period of change during the duration of the grant</p>		

with a change in CEO and staffing. At times this led to periods of slight under-delivery against original targets, but the organisation has been able to compensate for this, over-delivering at other points and reaching higher numbers through individual events.

The current CEO started in summer 2019 and has been leading the development of a new organisational strategy to be in place by April 2020. This includes redefining SCC's role to focus on very small charities with incomes up to £350k (currently it focuses on those up to £1m); expanding its reach outside of London; and increasing its voice for small charities.

One of the strengths of SCC has been in forging partnerships across sectors. For example, they worked with the NCC to run a cyber security session and made 553 referrals to other support providers through their helpdesk. The new strategy aims to further strengthen links with other providers, making it clear that SCS will provide foundation and basic support and signpost to providers like NCVO and FSI as charities grow.

2. **Learning:** At the meeting we reflected on how to measure whether training has made a difference in the longer term. SCS is trialling a postcard method where trainees write what they will change on a postcard and 6 months later SCS calls to check whether they have achieved it. They are also looking at improved feedback systems to capture demographic analytics and explore the possibility of sharing call line data with other bodies.

The organisations has made a number of adjustments during the grant in response to learning. It had originally intended to redevelop its website as a community portal but there were difficulties with the development and on reflection it was felt to be too complex for member's needs. Instead staff are holding more regional face-to-face meetings and have improved the effectiveness of their helpline service by putting in better boundaries with designated opening times and expanding the service to 6 days a week, recognising that many small charities are volunteer-led in people's spare time.

3. **Knowledge:** new trends in local giving and placemaking are not always understood by small local organisations and there is a risk they are left behind or encouraged towards new methods that may not be (example of Crowdfunding given). There is a need to better communicate this and SCS is thinking about how to do this.
4. **Total assets:** SCS and the organisations they support would value use of free premises and asked whether there are any guides to free spaces in London. They also suggested a scheme to support bulk buying and recycling.

**Learning visit report**  
**Play, Adventure and Community Enrichment (PACE) 13343**

<b>1.1 Date of visit:</b> 29/01/2020	<b>1.2 Name of visiting staff:</b> Jemma Grieve Combes	<b>1.3 People met with:</b> SK (Senior Centre Manager); former and current project coordinator
<b>1.4 Programme Area &amp; Outcomes:</b> Making London More Inclusive <ul style="list-style-type: none"> <li>Disabled people actively taking part in the arts or sport</li> <li>Disabled people reporting increased well-being as a result of taking part in the arts or sport</li> </ul>		
<b>1.5 Purpose of the award:</b> £96,500 (£31,400; £31,500; £33,600) towards the Artist in Training programme costs for session salaries and running costs specifically to benefit disabled children.		
<b>Grant start date: 24/06/2017</b>		<b>Grant end date: 24/06/2020</b>
<b>Project progress and difference made</b>		
<p><b>2.1 Project Outcome 1:</b> Disabled children will experience a range of new arts activities, including arts which stimulate the senses which have added therapeutic benefits. Therapeutic benefits include meeting sensory needs facilitating relaxation and reducing stress, helping self-expression.</p> <p><b>2.2 Project Outcome 2:</b> Disabled children will participate in a range of artistic mediums. Some activities will improve fine motor skills, others will improve gross motor skills, increase activity rates and boost physical health.</p> <p><b>Progress made:</b> In year 2 the organisation successfully delivered 50 after school sessions and 10 Saturday sessions to 115 children. Projects included relevant topics such as the environment and (using recycled materials); exploring other cultures (Aboriginal artwork) as well of explorations of artists such as Picasso and Cezanne. A diversity of art forms are used drawing on different senses and experiences e.g. 2D and 3D; modelling with magnets; outdoor paint balloons; and still life drawing with relaxing background music.</p>		
<p><b>2.3 Project Outcome 3:</b> Disabled children will improve communication and social skills with completed artwork and increased interaction.</p> <p><b>2.4 Project Outcome 4:</b> Disabled children will have improved emotional health though reduced isolation and making new friends.</p> <p><b>Progress made:</b> Staff have observed developments in communication and improved emotional health in children attending the sessions. For example, 1 child was referred by the school due to behavioural difficulties but concentrated fully during the project sessions; 1 girl commented with surprise 'I didn't know art could be so relaxing'; new friendships have been formed; and some children with speech delay grew in confidence to use verbal and non-verbal communication methods.</p>		
<p><b>2.5 Project Outcome 5:</b> Disabled children will have increased experience of decision making</p> <p><b>Progress made:</b> Children feedback after every project and are supported through regular meetings to chose what activities they would like to do.</p>		

### Impact and learning: Funding Manager comments

PACE is a small charity in Camden offering play and childcare services for 2-18 year olds. The organisation is in the final year of a 3-year CBT grant for 'Artist in training': a programme of art activities ran in an integrative way but aiming to predominantly reach children with a range of disabilities. I visited on a weekday when a lively pre-school session was underway. I met with the former and current project manager and deputy centre manager in a room full of children's artwork.

- 1. Impact:** I was impressed with the quality and diversity of the artwork that the children had produced. The former project manager is an artist and it was clear that he had brought both his passion and knowledge of art to the children. The project puts an emphasis on completion so the children get an opportunity to finish and take pride in a piece of work. They showcase their work in an annual exhibition which also helps to promote the project in the local area. The organisation has good feedback processes in place with initial assessments of each child, surveys after every project and regular informal feedback from parents. The staff all know the children well and staff reflections are important. I do feel that the organisation could better communicate the overall impact of the project more strongly, for example, exploring ways to map each child's journey or adopting proportionate measures for some of the outcomes they want to achieve (e.g. around communication, emotional health etc).
- 2. Learning:** This was a new project for the organisation, and it has learnt along the way the best delivery approach. At first children were not getting a satisfactory level of artwork completion so the organisation changed its ratios now often working 1:1 or 1:2. This has been more effective giving children the right level of support and focus. They had planned to have a formal 'creative mentor' aspect to the project where former participants return as mentors. However, they have found the children prefer to come back as participants, though more informally some of the more confident children have begun to support others.

The organisation takes an integrative approach which allows it to include siblings, children on care plans and children with other needs as well as those with disabilities. However, in year 2, the proportion of disabled children was much lower than expected. This has changed as the project has developed. The organisation has found that referral pathways have become stronger, especially with school partners.

- 3. Knowledge:** the organisation reports the local area has a good range of provision for children in the week – particularly after school clubs – but there is a gap at the weekends.
- 4. Total assets:** nothing identified by the organisation but communicating our support offer would be helpful.

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust Committee	26 <sup>th</sup> March 2020
<b>Subject:</b> City Bridge Trust Communications & Events Attended	<b>Public</b>
<b>Report of:</b> The Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Information</b>
<b>Report author:</b> Catherine Mahoney - Communications Manager, Charity and Philanthropy	

## Summary

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

## Recommendation

Members are asked to:

- Receive the report and note its contents.

## Main Report

### Key Audience Group Reporting

1. Appendix 1 reports communications activity between 11/01/20 and 10/03/20 against some of the audiences identified in the Communications vision. This shows continued levels of engagement against our audiences.
2. With regards to the Regulators & Politicians audience, your Members and Officers attended events involving this audience, including the Beacons Collective and London Funders. David Farnsworth attended a round table discussion with new Westminster MP Nickie Aitken, about the CoLC / CBT scope and offer, and she consequently cited CBT's mission and work in her maiden speech.
3. Appendix 2 provides a detailed breakdown of the media activity supporting delivery of your Communications Strategy during this period, led by Kristina Drake, City of London Media Officer.
4. A number of recent grants awarded by the Trust were the subject of media coverage. These included coverage in the Disability Horizon Magazine, a lot of coverage, (including the Evening Standard) of The Children's Society grant. An

op-ed by Dhruv Patel was published in Fundraising magazine about the Small Grants Programme.

### **External Events Register**

5. Officers and Members attended a range of internal and external meetings during the period in question, the Princes Trust HQ, a seminar on health and happiness and the Big Network day with London Funders, and some successful networking dinners, including the CBT annual dinner, and the Mansion House Bishops Dinner.
6. A full list of external events attended by officers and Members on behalf of the Trust can be found at Appendix 3.

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## Appendix 1: Key Audience Groups

Audience	Face to face	Online and Printed Media channels	Online content
Londoners	All recent events were attended by Londoners. A full list can be found in the External Events table report (Appendix 3).	<a href="#">Newham Recorder</a> <a href="#">Camden News</a> <a href="#">Evening Standard</a> <a href="#">City Matters</a>	CBT Twitter: <ul style="list-style-type: none"> <li>• 7765 followers</li> <li>• 41.3K impressions*</li> </ul> CBT Website: <ul style="list-style-type: none"> <li>• 8,808k users - an increase</li> <li>• 13k sessions</li> <li>• 2 mins and 52 s average time spent, mainly on the 'What We Fund' page</li> </ul>
Regulators & politicians	<ul style="list-style-type: none"> <li>• NCVO</li> </ul>	<a href="#">Fundraising</a> <a href="#">BBC Parliament</a>	n/a

Audience	Face to face	Online and Printed Media channels	Online content
Immediate stakeholders**	<ul style="list-style-type: none"> <li>• London Funders</li> <li>• Toynbee Hall</li> <li>• Deptford Reach</li> <li>• Princes Trust</li> <li>• Clothworkers Association</li> </ul>	<a href="#"><i>Civil Society</i></a> <a href="#"><i>Daily Asian Age</i></a> <a href="#"><i>Children and Young People Now</i></a> <a href="#"><i>Charity Today</i></a>	<ul style="list-style-type: none"> <li>• News items on the CoL intranet and e-bulletin.</li> <li>• Regular updates in the Members' Briefing.</li> </ul>
Other funders, policy makers & key commentators	<p>Meetings &amp; events with various funders including:</p> <p>Other events including:</p> <ul style="list-style-type: none"> <li>• Beacon Collective</li> <li>• London Funders</li> <li>• Paul Hamlyn</li> <li>• Clore Foundation</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	n/a

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

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

### Media Coverage 14 January –10 March 2020

Organisation	Publication	# of readers	Overview	Coverage	Date	Web link
The Children's Society	Newham Recorder	9360	Newham Recorder reports that City Bridge Trust has awarded a £120,000 grant to The Children's Society, to support young victims of trafficking. It comes after The Children's Society warned that rising numbers of children are being trafficked from London and other cities and forced to distribute drugs by "county lines" gangs. Dhruv Patel, Chairman of the City Bridge Trust Committee, is quoted.	Local	14/01	<a href="#">Newham Recorder</a>

The Children's Society	City Matters	20,000	Additional coverage of £120,000 grant to The Children's Society			<a href="#">City Matters</a>
Stepping Stones	Civil Society		<a href="#">Civil Society</a> runs an OpEd from Dhruv Patel, Chairman of the City Bridge Trust Committee, on social investment. [£]	Trade	16/01	<a href="#">Civil Society</a>
The Bike Project	City Matters	20,000	<a href="#">City Matters</a> covers a grant given by the City Bridge Trust, to a Southwark charity giving free bicycles to London's refugees and asylum seekers. The £106,000 grant received will be used to help them integrate and improve access to key services. Dhruv Patel, Chairman of the City of London Corporation's City Bridge Trust Committee, is quoted.	London	16/01	<a href="#">City Matters</a>
CARIS Haringey	Charity Today		<a href="#">Charity Today</a> covers the grant awarded by City Bridge Trust, the charitable arm of the City Corporation, to homeless charity CARIS Haringey. Funds will be used to pay for the charity's food parcel project and will also cover an advice service helping people at risk of	Online	20/01	<a href="#">Charity Today</a> .

			homelessness.			
CARIS Haringey	City Matters	20,000	Additional coverage of grant to CARIS Haringey	London	21/01	<a href="#">City Matters</a>
N/A	Fundraising		Dhruv Patel, Chairman of the City of London Corporation's City Bridge Trust Committee, writes an oped in <a href="#">Fundraising</a> magazine on the charity-funder's new Small Grants programme.	Trade	21/01	<a href="#">Fundraising</a>
Mitcham VR Festival	At the Theatre		<a href="#">At The Theatre</a> references City Bridge Trust in a piece about Mitcham VR Festival - a project Showcasing the latest immersive technologies as part of London Borough of Culture.	Trade	06/02	<a href="#">At The Theatre</a>
Charity Matters Report	City Matters	20,000	<a href="#">City Matters</a> reports on a special London edition of the Charity Matters Report , funded by City Bridge Trust, which is due to be published later this year.	London	11/02	<a href="#">City Matters</a>
Blue Sky Actors	Live Review		The City Bridge Trust is referenced in <a href="#">Live Review</a> in an article after new patrons of Blue Sky Actors – an organisation funded by the Trust – were announced.	Online	20/02	<a href="#">Live Review</a>

Grants to 23 London charities	Charity Today		<a href="#">Charity Today</a> carries an article mentioning the City Bridge Trust, after 23 London charities have been granted a share of a multi-million pound investment pot. Dhruv Patel, Chairman of the City Bridge Trust Committee, is quoted		19/02	<a href="#">Charity Today</a>
Grants to 23 London charities	City Matters	20,000	As above		19/02	<a href="#">City Matters</a>
Grants to 23 London charities	SE16		As above		19/02	<a href="#">SE16</a>
Blue Sky Actors	Disability Horizons Matters		Further coverage of City Bridge Trust's grant to theatre charity Blue Sky Actors	London	21/02	<a href="#">Disability Horizons Magazine</a>
N/A	BBC Parliament	Circa 2 million	City Bridge Trust is mentioned on <a href="#">BBC Parliament</a> during a live broadcast from the House of Commons as Nickie Aicken, MP for the Cities of London and Westminster, mentioned the Trust's work across London tackling rough sleeping.	National	24/02	<a href="#">BBC Parliament</a> (viewable internally only)

## CITY BRIDGE TRUST

**External Events Register**  
**Attended 10<sup>th</sup> January – 10<sup>th</sup> March 2020**

<b>Date</b>	<b>Host Organisation</b>	<b>Type of Event</b>	<b>City of London's Representative</b>	<b>Location/Borough</b>	<b>Summary</b>
09/01/2020	NCVO	LocalMotion	David Farnsworth, Jenny Field	National Council for Voluntary Organisations Society	CEO's and DDG Meeting
15/01/2020	LLST/London Funders	London Advice Funders Network	Sandra Jones	Conway Hall, WC1	Forum for funders who support advice
16/01/2020		London Government Dinner 2020	David Farnsworth	Mansion House	Annual Dinner for London Councils

20/01/20	Deptford Reach	Learning Visit	Julia Mirkin (only)	Lewisham	CBT Learning visit
21/01/20 20	Saxton Bampfylde	Talking Leadership' at Dinner	David Farnsworth, Fiona Rawes	Saxton Bampfylde, 9 Savoy Street	Clore Foundation Leadership discussion
22/01/20 20	Charity Finance Group	Members meeting	Karen Atkinson	City of London	Charity sector technical update
05/02/20 20	Beacon Organisation's Council	Meeting	Fiona Rawes	10 St Bride St, London	
13/02/20 20	LM's dinner	Dinner to the Archbishops and Bishops	David Farnsworth	Mansion House	Annual Dinner for London's Bishops
13/02/20	South West London Law Centre	Anniversary Event	Shegufta Slawther, Funding Manager	Battersea Arts Centre, Wandsworth	45th anniversary celebration with film screening

13/2/20	Business Healthy / ELBA / Heart of the City	Masterclass - presentation & networking event	Alice Hall	City of London	Doing Good, Feeling Good - Business Healthy event giving insight into the benefits of organisations engaging in volunteering and CSR opportunities
20/02/20	Toynbee Hall;	Learning Visit	Ruth Feder; Giles Shilson	Toynbee Hall;	Very productive Learning Visit
24/02/20 20	London Funders	London Funders Big Network Day	David Farnsworth	City Hall	Chance to network with other funders.
26/02/20	Paul Hamlyn Foundation	Seminar	Julia Mirkin (only)	PHF Offices	Evaluation findings presentation by Renaisi on PHF's Youth Fund

28/02/20	The Prince's Trust	Panel Discussion	Alderman Alison Gowman, Ciaran Rafferty Funding Director, Shegufta Slawther, Funding Manager	The House of Lords	Tackling Youth Violence
03/03/20	CoL	London Funders round table event	Julia Mirkin	CoL	Round table event about Resilience.
03/03/20 20		Action Learning Lunch	David Farnsworth	The Sky Room, The Story Garden	Action learning with other CEOs
03/03/20 20	The Clothworkers Company	Dinner for Masters and Clerks Dinner	David Farnsworth	Clothworkers Hall	

04/03/20	CBT	Committee Dinner	CBT Committee, staff and partners	Barbican	Annual Dinner
05/03/20	Beat	Seminar	Geraldine Page	All London	Eating Disorders Panel Discussion -Treatment Models that Empower Families
10.03.20	Prince's Trust	Dinner	Dhruv Patel and Alison Gowman	Buckingham Palace	A thank you from PT for our support

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