



Grants Committee of the Bridge House Estates Board

Date: MONDAY, 20 JUNE 2022
Time: 11.00 am
Venue: COMMITTEE ROOMS, GUILDHALL AND MICROSOFT TEAMS

Members: Alderman & Sheriff Alison Gowman
Paul Martinelli
Judith Pleasance
Deputy Nighat Qureishi
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

Enquiries: Joseph Anstee
joseph.anstee@cityoflondon.gov.uk

Accessing the virtual public meeting

Members of the public can observe this virtual public meeting at the below link:

<https://youtu.be/UZWYtA9SnzA>

A recording of the public meeting will be available via the above link following the end of the public meeting for up to one municipal year. Please note: Online meeting recordings do not constitute the formal minutes of the meeting; minutes are written and are available on the City of London Corporation's website. Recordings may be edited, at the discretion of the proper officer, to remove any inappropriate material.

Lunch will be served in the Guildhall Club following the meeting.

**John Barradell
Town Clerk**

AGENDA

Part 1 - Public Agenda

Trigger warning: these papers include discussion of a number of sensitive topics which could cause distress. Topics may include, but are not necessarily limited to: hate crime, abuse, suicide, self-harm, coercion and neglect.

Governance and Strategy

1. APOLOGIES

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

3. TERMS OF REFERENCE

To receive the Committee's terms of reference, as agreed by the Bridge House Estates Board on 27 April 2022.

For Information
(Pages 7 - 8)

4. ELECTION OF CHAIR

To elect a Chair in accordance with Standing Order 29.

For Decision

5. ELECTION OF DEPUTY CHAIR

To elect a Deputy Chair in accordance with Standing Order 30.

For Decision

6. MINUTES*

To agree the public minutes and non-public summary of the meeting held on 9 March 2022.

For Decision
(Pages 9 - 16)

7. OUTSTANDING ACTIONS

Report of the Town Clerk

For Information
(Pages 17 - 18)

8. **BHE MANAGING DIRECTOR'S UPDATE REPORT**
Report of the Managing Director of Bridge House Estates (BHE)

For Information
(Pages 19 - 30)

9. **ANCHOR PROGRAMME**
Report of the Managing Director of BHE

For Decision
(Pages 31 - 42)

Bridging Divides - Funding Applications

10. **SUMMARY OF BRIDGING DIVIDES***
To note a summary of the Bridging Divides programme.

For Information
(Pages 43 - 44)

11. **STRATEGIC INITIATIVE - ACTION FOR RACE EQUALITY - WINDRUSH JUSTICE (REF: 19453)**
Report of the Managing Director of BHE

For Decision
(Pages 45 - 50)

12. **STRATEGIC INITIATIVE - PLACE2BE (REF: 19322)**
Report of the Managing Director of BHE

For Decision
(Pages 51 - 56)

13. **ALLIANCE PARTNERSHIPS - LONDON LEGAL SUPPORT TRUST, ADVISE SKILLS DEVELOPMENT (REF: 19437)**
Report of the Managing Director of BHE

For Decision
(Pages 57 - 70)

14. **THE CORNERSTONE FUND ROUND 2**
Report of the Managing Director of BHE

For Information
(Pages 71 - 72)

a) **London Youth (REF: 19238)**
Report of the Managing Director of BHE

For Decision
(Pages 73 - 76)

- b) **Bridge Renewal Trust (REF: 19150)**
Report of the Managing Director of BHE

For Decision
(Pages 77 - 80)

- c) **Africa Advocacy Foundation (REF: 19267)**
Report of the Managing Director of BHE

For Decision
(Pages 81 - 84)

- d) **AdviceUK (REF: 19250)**
Report of the Managing Director of BHE

For Decision
(Pages 85 - 88)

- e) **Global Black Thrive (REF: 19237)**
Report of the Managing Director of BHE

For Decision
(Pages 89 - 92)

15. **GRANT FUNDING ACTIVITY: PERIOD ENDED 6 JUNE 2022**
Report of the Managing Director of BHE

For Decision
(Pages 93 - 116)

Other

16. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE
AND ANY OTHER BUSINESS THAT THE CHAIR CONSIDERS URGENT**

17. **EXCLUSION OF THE PUBLIC**

MOTION – With the Court of Common Council for the City Corporation as Trustee of Bridge House Estates (Charity No. 1035628) having decided to treat these meetings as though Part VA and Schedule 12A of the Local Government Act 1972 applied to them, it now be moved that the public be excluded from the meeting for the following items of business on the grounds that their consideration will in each case disclose exempt information of the description in paragraph 3 of Schedule 12A, being information relating to the financial and business affairs of any person (including the City Corporation as Trustee of the charity) which it would not be in the charity's best interests to disclose.

For Decision

Part 2 - Non-Public Agenda

Governance and Strategy

18. NON-PUBLIC MINUTES

To agree the non-public minutes of the meeting held on 9 March 2022.

For Decision
(Pages 117 - 120)

19. BRIDGING DIVIDES: RESPONSIVE GRANT PROGRAMMES

Report of the Managing Director of BHE

For Decision
(Pages 121 - 142)

Bridging Divides - Funding Applications

20. PIPELINE OF STRATEGIC INITIATIVES*

Report of the Managing Director of BHE

For Information
(Pages 143 - 146)

21. REPORT OF DECISIONS TAKEN UNDER DELEGATED AUTHORITY AND URGENCY*

Report of the Town Clerk

For Information
(Pages 147 - 148)

22. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE AND ANY OTHER BUSINESS WHICH THE CHAIR CONSIDERS URGENT AND WHICH THE COMMITTEE AGREES SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED

*NB: Certain non-contentious matters for information have been marked * with recommendations anticipated to be received without discussion, unless the Committee Clerk has been informed that a Member has questions or comments prior to the start of the meeting.*

This page is intentionally left blank

GRANTS COMMITTEE OF THE BRIDGE HOUSE ESTATES BOARD 2022/23

1. Constitution

A Committee of the Bridge House Estates Board, and a sub-committee of the Court of Common Council, responsible for discharging functions of the Board in furthering the ancillary object of Bridge House Estates (charity reg. no. 1035628), consisting of:

- 4 Commoners or Aldermen appointed on an annual basis by the Bridge House Estates Board, either directly from the Bridge House Estates Board or from the wider Court of Common Council.
- 2 external co-opted members (with full voting rights, recruited by the Board in accordance with the procedure approved by the Court) to be appointed on a staggered basis of a 12-month term and an 18-month term during 2022/23.

and each is a “Member”.

2. Quorum

The quorum consists of three members, although Members of the Court (Commoners or Alderman) must form the majority of those in attendance to form a quorum.

3. Membership 2022/23

| | |
|------------------------------------|-------|
| Sheriff and Alderman Alison Gowman | 2 (2) |
| Judith Lindsay Pleasance | 2 (2) |
| Paul Martinelli | 2 (2) |
| Deputy Nighat Qureshi | 1 (1) |

together with the two external co-opted members referred to in paragraph 1 appointed by the Bridge House Estates Board, in accordance with the procedure for their appointment approved by the Court which provides that co-opted members will be selected on the basis of their skills, knowledge and experience in order to ensure that the Board and its Committees have an appropriate balance of skills, knowledge and experience necessary to administer the charity on behalf of the Court.

4. Terms of Reference

In accordance with the Charities (The Bridge House Estates) Order 1995 (as amended) for the following purposes: -

- In or towards the provision of transport and access to it for the elderly or disabled people in the Greater London area; and/or,

- For other charitable purposes for the general benefit of the inhabitants of Greater London,

to be responsible for:

- (a) Implementing the policy settled by the Trustee for the application of funds allocated to further the ancillary object of Bridge House Estates (“the policy”), including to determine the application of funds in accordance with that policy other than decisions to apply £500,001 or more for a grant, project or activity, which decisions are reserved to the Bridge House Estates Board (“the Board”) upon this Committee’s recommendation;
- (b) Determining terms, conditions and other requirements to be imposed in applying the charity’s funds in accordance with the policy; and
- (c) Reviewing and analysing the amounts, nature and spread of funding approved or refused by way of grants or otherwise applied under the policy;
- (d) Reviewing and making recommendations to the Board on the policy, and in so doing to undertake consultation with appropriate persons as required by Order of the Charity Commissioners, dated 10 July 1997;
- (e) Making recommendations on the management and the operation of administrative arrangements as they relate to furthering the ancillary object.

GRANTS COMMITTEE OF THE BRIDGE HOUSE ESTATES BOARD Wednesday, 9 March 2022

Minutes of the meeting of the Grants Committee of the Bridge House Estates Board held at Committee Rooms, West Wing, Guildhall and via Microsoft Teams on Wednesday, 9 March 2022 at 10.00 am

Present

Members:

Paul Martinelli (Chair)
Alderman & Sheriff Alison Gowman (Deputy Chair)
Judith Pleasance
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

Officers:

| | |
|------------------------|---|
| David Farnsworth | - Managing Director of Bridge House Estates |
| Amelia Ehren | - Bridge House Estates |
| Dinah Cox | - City Bridge Trust |
| Aasha Farah | - City Bridge Trust |
| Stewart Goshawk | - City Bridge Trust |
| Samantha Grimmett-Batt | - City Bridge Trust |
| Emma Horrigan | - City Bridge Trust |
| James Lee | - City Bridge Trust |
| Julia Megone | - Chamberlain's Department |
| Nathan Omane | - Chamberlain's Department |
| Anne Pietsch | - Comptroller & City Solicitor's Dept. |
| Fiona Rawes | - City Bridge Trust |
| Tim Wilson | - City Bridge Trust |
| Joseph Anstee | - Town Clerk's Department |

The Chair opened the meeting by welcoming Members and officers, as well as any members of the public or stakeholders observing the meeting via YouTube.

1. **APOLOGIES**

There were no apologies.

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

Alderman & Sheriff Alison Gowman declared an interest in Item 13 by virtue of being a Trustee of Trust for London and advised that she would not speak and abstain from voting on this item.

3. **MINUTES***

RESOLVED – That the public minutes and non-public summary of the meeting held on 6 December 2021 be agreed as a correct record.

Matters Arising

The Committee gave thanks to Dhruv Patel for his service to the Committee, and to the former City Bridge Trust Committee which he had chaired, noting that since the previous meeting he had left the Court of Common Council and therefore the Bridge House Estates (BHE) Board and the Grants Committee of the BHE Board.

The Committee also recorded its congratulations to Jenny Field, former Deputy Director of CBT, on her award of an OBE.

4. **OUTSTANDING ACTIONS**

The Committee received a list of outstanding actions and noted the updates provided in respect of the items listed.

RESOLVED – That the outstanding actions list be noted.

5. **BHE MANAGING DIRECTOR'S UPDATE REPORT**

The Committee considered a report of the Managing Director of BHE providing an update on key areas of activity and outlining upcoming activities. The Managing Director of BHE introduced the report, and the Committee discussed the updates provided.

Ukraine

The Managing Director of BHE advised that CBT was responding to the impact of the war in Ukraine, both independently and in conjunction with other funders, including through London Councils. The Committee noted CBT's longstanding commitment to supporting refugees, with several live grants in this space.

Staffing

The Committee gave thanks to long-serving CBT officers Sandra Davidson and Kate Moralee on their last meeting of the Committee for their valuable contributions to CBT and to the work of the Committee, as well as the former CBT Committee.

Bridging Divides Strategy

The Managing Director of BHE drew the Committee's attention to the recommendation to recommit to the Bridging Divides Strategy for a further five years from 2023. If agreed, the proposal would be taken forward to the BHE Board and then the Court of Common Council for formal approval.

Development Grants

The Committee noted the recommendation in respect of development grants of up to £50,000 to organisations participating in the design of the Anchor programme. The Managing Director of BHE outlined the proposal, advising that whilst this could be implemented under the existing delegated authority thresholds, it was put to the Committee for consultation.

Learning Reports

The Committee noted the learning case study on Alliance for Inclusive Education (ALLFIE) appended to the report. In response to a question from a Member, the Managing Director of BHE advised that the Impact & Learning team would commit the learning from organisations to consider CBT's ways of working and what could be offered.

RESOLVED – That the Grants Committee of the BHE Board:

- a) Note the report;
- b) Agree to take the agreed recommendation for BHE to re-commit to the overarching vision and mission of the Bridging Divides funding strategy and to extend the funding strategy for a further five years from 2023 to 2028, and to take this recommendation to the April 2022 BHE Board and (subject to approval) to Court of Common Council in May 2022 (with the Charity Commission being then formally notified, subject to agreement); and,
- c) Agree in principle that Officers award a series of development grants of up to £50k to organisations participating in the design of the Anchor programme.

6. **CITY BRIDGE TRUST (CBT) HIGH LEVEL BUSINESS PLAN 2022/23**

The Committee considered a report of the Managing Director of BHE presenting the 2022-23 CBT high-level Business Plan for approval. The Managing Director of BHE introduced the report and drew Members' attention to the key points. A Member commented that it was positive to see risk issues given appropriate weight within the Business Plan.

RESOLVED – That the Grants Committee of the BHE Board approve the CBT high-level Business Plan for 2022-23.

7. **DIVERSITY, EQUITY AND INCLUSION UPDATE REPORT**

The Committee considered a report of the Managing Director of BHE providing the Grants Committee with an update on the Diversity, Equity and Inclusion (DEI) work being undertaken by the CBT team, and an overview of the DEI grants awarded over the past 5 years, with a recent CBT workforce profile. The Managing Director of BHE introduced the report and outlined the key features and ongoing workstreams for Members.

In response to a question from the Chair regarding data collection, the Managing Director of BHE advised that the collation of data would be reviewed, given the potential issues with methods such as key word searches.

RESOLVED – That the report be received, and its contents noted.

8. **BUDGET MONITORING REPORT FOR CITY BRIDGE TRUST (CBT): PERIOD ENDED 31 JANUARY 2022**

The Committee received a report of the Managing Director of BHE providing a year to date (April 2021 to January 2022) financial position of CBT and an updated forecast for the financial year ending 31 March 2022. The Managing Director of BHE introduced the report and outlined the key features for the Committee.

In response to a question from a Member regarding the distribution of grant underspend, the Managing Director of BHE advised that the amount anticipated had been estimated during the pandemic, during which spending was more difficult to predict. The Managing Director of BHE added that the focus had been on spreading the spend as far as possible, and forecast the remaining spend across the upcoming years. Consequently this could be considered a deferred spend rather than underspend, with a view to releasing the funding into the sector in a more sustainable way.

The Deputy Chair queried whether there would be a substantive review of the CBT and wider BHE response to Covid-19, either individually or as part of a wider government review. The Managing Director of BHE advised that this had been part of CBT's group learning, some of which was informing current work such as the Collaborative Action for Recovery (CAR). Further to this, learning was being taken from responses to Covid-19 elsewhere. The Covid-19 response had also been incorporated into the Interim Review of Bridging Divides. The Deputy Chair suggested that the various strands eventually be pulled into one document for future reference.

The Committee then noted that actual spend set against the budget, as well as the assessment pipeline and forecasted grants.

RESOLVED – That the report be noted.

9. **SUMMARY OF BRIDGING DIVIDES***

The Committee noted a summary of the Bridging Divides programme.

10. **LONDON YOUTH: STRATEGIC INITIATIVE**

The Committee considered a report of the Managing Director of BHE setting out a request from London Youth for £500,000 support from City Bridge Trust given income lost due to Covid-lockdowns and the ongoing value of a strong youth sector in the capital, for recommendation to the BHE Board. The Managing Director of BHE introduced the application and drew Members' attention to the key points.

RESOLVED – That the Grants Committee of the BHE Board endorse a grant of £500,000 over five months as a one-off grant to underpin London Youth's core costs and enable its work to benefit the capital's youth organisations, for onward approval by the Bridge House Estates Board.

11. **ALLIANCE PARTNERSHIPS - JOHN LYON'S CHARITY (REF:19148)**

The Committee considered a report of the Managing Director of BHE requesting funding from CBT of £1,020,000 (representing £1m for grants expenditure and £20,000 for operational costs) towards a partnership with John Lyon's Charity, seeking to support organisations working with children and young people in west and north-west London. The Managing Director of BHE introduced the application and drew Members' attention to the key points. The Chair commented that this was an exciting proposal which demonstrated the leverage and benefit of Alliance partnerships.

In response to a question from a Member, the Managing Director of BHE advised that the amount recommended had been assessed in conjunction with the relevant organisations, with a view to providing as much funding as possible whilst still distributing the funding in a sustainable way. The Chair commented that the project could be reviewed for further funding opportunities after a year or so.

RESOLVED – That the Grants Committee of the BHE Board endorse a grant of £1,020,000, as an Alliance Partnership, for onward approval by the Bridge House Estates Board, to John Lyon's Charity, registered charity no: 237725, towards its Recovery Fund, providing grants to strengthen children & young people's organisations. £1m of the award is to supplement JLC's grant-making, with the additional £20,000 as a contribution towards its costs of administering these funds. The funding is to be restricted to support organisations benefitting Londoners.

A payment schedule will be drawn up, allowing the funds to be paid to JLC in instalments, enabling payments to be received prior to onward grants being committed/paid.

12. **ALLIANCE PARTNERSHIP - UNITED ST SAVIOUR'S CHARITY (REF:19149)**

The Committee considered a report of the Managing Director of BHE requesting funding from CBT of £500,000 towards a partnership with the United St Saviour's Charity, seeking to support organisations working with disadvantaged communities in the London Borough of Southwark, as part of the Alliance Partnerships initiative. The Managing Director of BHE introduced the application and outlined the key points for Members.

RESOLVED – That the Grants Committee of the BHE Board endorse a grant of £500,000, as an Alliance Partnership, for onward approval by the Bridge House Estates Board, to the United St Saviour's Charity (USSC), registered charity no: 1103731, towards its work supporting disadvantaged communities in London Borough of Southwark.

The funding is to be restricted to support organisations benefitting Londoners. A payment schedule will be drawn up, allowing the funds to be paid to USSC in instalments, enabling payments to be received prior to onward grants being committed/paid.

13. **ALLIANCE PARTNERSHIPS - TRUST FOR LONDON (19207, 19208)**

The Committee considered a report of the Managing Director of BHE requesting funding of £3.5m to be awarded to Trust for London (TFL) for use toward onward grants and funder plus1 support within two new funds: a Racial Justice Fund (RJF) [19207] (accounting for £2m of the award) and a Disability Justice Fund (DJF) [19208] (accounting for £1.5m of the award). The Managing Director of BHE introduced the application and drew Members' attention to the key points.

RESOLVED – That the Grants Committee of the BHE Board endorse a grant of £3.5m, as an Alliance Partnership, for onward approval by the Bridge House Estates Board, to Trust for London [charity no: 20529] for onward grantmaking as part of two funds:

- a. £2m for the Racial Justice Fund which will directly resource Black and minority-led organizations working at the intersections of racial and economic justice to address systemic policies and inequities. The funding is to be restricted to support organisations benefitting Londoners.
- b. £1.5m for the Disability Justice Fund, providing grants to strengthen the disability movement in London by supporting organisations led by Deaf and Disabled people to grow in effectiveness, power, and influence. The funding is to be restricted to support organisations benefitting Londoners.

A payment schedule will be drawn up, allowing the funds to be paid to TFL in instalments over the course of the grant commitment period and to be received prior to onward grants being committed/paid.

14. **GRANT FUNDING ACTIVITY: PERIOD ENDED 24TH FEBRUARY 2022**

The Committee considered a report of the Managing Director of BHE providing details of funds approved under delegated authority since the last meeting of the BHE Grants Committee in December 2021 through to 24 February 2022; any grant variations that have been approved under delegated authority; and seeking the Committee's approval for six grant applications above the delegated authority threshold and 10 grant application rejections. The Managing Director of BHE introduced the report and drew Members' attention to the key points, also giving further context to the Cornerstone Fund applications. In response to a question from a Member, the Managing Director of BHE confirmed that a further application from London Funders may be necessary.

RESOLVED – That the Grants Committee of the BHE Board:

- a) Receive this report and note its contents;
- b) Approve the grants as recommended in appendix 3; and,
- c) Approve the rejection of 10 grant applications listed in appendix 4.

15. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE AND ANY OTHER BUSINESS THE CHAIR CONSIDERS URGENT**

There was no other business.

16. **EXCLUSION OF THE PUBLIC**

RESOLVED – That with the Court of Common Council for the City Corporation as Trustee of Bridge House Estates (Charity No. 1035628) having decided to treat these meetings as though Part VA and Schedule 12A of the Local Government Act 1972 applied to them, the public be excluded from the meeting for the following items of business on the grounds that their consideration will in each case disclose exempt information of the description in paragraph 3 of Schedule 12A, being information relating to the financial and business affairs of any person (including the City Corporation as Trustee of the charity) which it would not be in the charity’s best interests to disclose.

17. **NON-PUBLIC MINUTES***

RESOLVED – That the non-public minutes of the meeting held on Monday 6 December 2021 be agreed as a correct record.

18. **BRIDGING DIVIDES: COMPLETION OF INTERIM REVIEW**

The Committee considered a report of the Managing Director of BHE.

19. **NON-PUBLIC APPENDICES: DIVERSITY, EQUITY AND INCLUSION UPDATE REPORT - CBT WORKFORCE DATA**

The Committee received non-public appendices in respect of Item 7.

20. **TEN-YEAR GRANTS**

The Committee received a report of the Managing Director of BHE.

21. **COLLABORATIVE ACTION FOR RECOVERY**

The Committee considered a report of the Managing Director of BHE.

22. **PIPELINE OF STRATEGIC INITIATIVES**

The Committee received a report of the Managing Director of BHE.

23. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE AND ANY OTHER BUSINESS THAT THE CHAIR CONSIDERS URGENT AND WHICH THE COMMITTEE AGREES SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

There were three items of other business.

The meeting ended at 11.25 am

Chair

Contact Officer: Joseph Anstee
joseph.anstee@cityoflondon.gov.uk

This page is intentionally left blank

The Grants Committee of the Bridge House Estates – Outstanding Actions

Status Key

Green = Complete

Amber = In progress

Red = Not yet started

| Item | Date | Action | Officer responsible | Target Completion Date | Actual Completion Date | Progress update | RAG |
|------|-----------------|---|----------------------|------------------------|------------------------|--|-------|
| 1. | 6 December 2021 | Officers to explore ways to encourage the use of electric vehicles, given the prohibitive costs of the congestion charge and ULEZ, noting that CBT funded eco-audits in respect of buildings. | CBT Funding Managers | June 2022 | June 2022 | June 2022: Vehicle usage is relatively rare in CBT grants but where it occurs FM's will take a case-by-case approach to ensuring that carbon emissions are minimised. Given how infrequently vehicle costs arise in CBT applications, officers have not included electric vehicles in the proposed update to "Making London a Greener City for All" in the non-public papers for today's meeting. CBT's Environmental Action Plan will explore whether other steps can be taken to encourage low-emission transport. | Green |
| 2. | 6 December 2021 | Review CBT Risk Register, particularly the 'Brexit' risk which | Scott Nixon | June 2022 | - | An in-depth review of all the charity's risks is taking place in June 2022 with two workshops | Amber |

| | | | | | | | |
|--|--|------------------------------|--|--|--|---|--|
| | | had previously been removed. | | | | being held on 9 June with Members and on 21 June with the Leadership Team. The Brexit risk will be considered as part of this review, with input from Members (including the Chair of the Grants Committee) and officers. | |
|--|--|------------------------------|--|--|--|---|--|

| Committee | Date |
|---|------------------------|
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: BHE Managing Director's Update Report | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support? | 1, 2, 3 |
| Which Bridging Divides Funding Strategy priority does proposal aim to support? | All |
| Does this proposal require extra revenue and/or capital spending? | No |
| Report of: David Farnsworth, Managing Director of BHE | For Information |

Summary

To support the Grants Committee in the discharge of its duties, this regular report provides an update on key areas of activity to note and agree, where necessary. Specifically, the report provides details on the following: the agreed extension of the Bridging Divides Strategy; budget monitoring information; updates on the LocalMotion collaboration, Alliance Partnerships, London's Giving, the Anchor Programme and the Bridge Programme; how CBT intends to communicate its offer with clarity; and recent impact and learning findings including details of the London Funders Festival of Learning and, finally, a learning case study on Lewisham Local.

Recommendations

The Grants Committee is recommended to:

- i) Note the contents of the report.

Main Report

Governance and Strategy

1. Extension of Bridging Divides Strategy - Following the endorsement of the Grants Committee and the BHE Board to re-commit to the overarching vision and mission of *Bridging Divides 2018 – 2023*, in May 2022 the Court of Common Council agreed to extend the funding policy for a further five years to 2028. Officers have also written to update the Charity Commission of the extension of funding policy in line with the requirements of BHE's governing documents.
2. Whilst the Grants Committee and the BHE Board agreed that the funding policy should be extended, both also agreed that the manner of delivery of the *Bridging Divides* policy should be revised to allow for more effective and impactful activities and use of funds. Specifically, it is intended to make the policy more transparent and relevant to the needs of beneficiaries by updating all current open funding programmes to include a more explicit equalities focus; collaborating with other funders to extend the reach and scale of *Bridging Divides*; supporting strategic interventions with and for communities especially hard hit by the pandemic; and investing further in the capacity and resilience of civil society organisations.
3. Responsive Funding Programmes - The Funding Team recently completed a review of all responsive funding streams, taking account of learning from the

pandemic, research literature and consultations with key partner organisations. The non-public section of today's agenda includes a report with recommendations for CBT's open funding offer. This provides an example of how the manner of delivery of the *Bridging Divides* policy is being updated following the extension approval.

4. Member Briefing - Officers delivered a presentation at a New Members' Briefing event at Guildhall on 25 May, briefing newly elected Members on charitable and philanthropic activity at the City Corporation. The in-person briefing covered the history of BHE, Tower Bridge, and the primary and ancillary objects, the Bridging Divides funding strategy, social investment activity, the Philanthropy Strategy, Central Grants Unit and Corporate Charities Review, and an outline of Trustee duties and principles of good governance. This was followed by a Q&A session. A recording of this session is available to all Members on request.

Finance – Budget Monitoring

5. CBT's budget for 2022-23 is a total net expenditure of £107.5m, made up of an allocation of £102.6m to the grants programme and £4.9m (net of income) to operational costs. Total expenditure for the first two months of the financial year was £3.2m against a budget of £6.4m. The underspend arises from Grants and Employee costs.
6. The underspend in grants is due largely to the transition funding offer which places a cap on the maximum value of any individual grant. This offer is scheduled to end in late June and the non-public papers include proposals for the full unpausing of Bridging Divides, at which point we expect to see applications for higher values. Some underspend is also attributable to recent recruitment and the time taken onboarding new Funding Managers.
7. Employee costs underspend of £134k is due to some vacant posts, notably, three Funding Managers and a Social Investment Associate. Two of the Funding Managers vacancies arose due recent retirements. The Funding Directors are reviewing overall workload and resource requirements as a part of their recruitment planning. The Social Investment Associate role will be reviewed following the anticipated approval of the Supplemental Royal Charter.

Bridging Divides Funding Updates

LocalMotion

8. LocalMotion is a collaboration between CBT and five other funders, joining forces to tackle economic, environmental, and social inequality in six places, utilising the resources of all six funders and places to have an impact which is greater than the sum of its parts.
9. A branding and communications partner, *Barley Communications*, and learning partner, *IG Advisors*, have now been appointed and a learning report covering initial phases of work has been published (available on request). A website and social media handles will be launched shortly.

10. Grants Committee co-opted member (and LocalMotion “board champion”), William Hoyle, and Funding Director, Sam Grimmatt Batt, hosted a learning session, alongside Kathleen Kelly, Director of Collaboration for LocalMotion, at the Festival of Learning (an online funder convention which takes place annually over two weeks, convened by London Funders). The session shared learnings with other funders about how the collaboration had come about, and progress so far.
11. William Hoyle and Sam Grimmatt Batt also attended a bi-annual learning summit on 6-7 June in Birmingham. The session brought together funders and places to foster collaboration and learning and to celebrate progress and success as well as to co-design a learning plan for the next two years of the partnership.

Alliance Partnerships

12. Officers co-ordinated a session at the London Funders’ Festival of Learning sharing lessons from two CBT Alliance Partnerships (Rosa £500k, and Greater London Authority £720k) which included an introduction by Aasha Farah (Funding Manager and CBT DEI Working Group Chair), presentations from Rosa and the GLA and interviews with an assessor for one of the funds, and applicant of another. The session was focused on the value of including people with lived experience of the issues being tackled in the programme design and decision-making process. It was extremely well received, being one of the most well attended sessions of the festival.

London’s Giving

13. As reported at the last meeting of the Grants Committee, the London’s Giving Strategic Development Fund was launched on 3 February 2022 with a closing date of 17 March 2022. 19 applications were received, the overwhelming majority of which were from existing or emerging Placed-Based Giving Schemes (PBGS). Assessment of these is currently underway and officers are aiming to bring these to the September Grants Committee Meeting, either for decision (those above £250,000) or for information (those of £250,000 or below, approved by Delegated Authority).
14. As trailed in this report at the last meeting, two consultants have been procured, following a competitive tendering process, to explore the feasibility of two additional ideas that could support the strategic development of PBGS in London.
15. Deborah Xavier, a freelance consultant, has been engaged to investigate the feasibility of establishing a Resource Hub for PBGS. This would build on the existing, excellent work of London’s Giving, currently hosted by London Funders. The social enterprise, the Social Innovation Partnership (TSIP) has been engaged to explore the feasibility of establishing a Challenge/Match Fund to enable local schemes to leverage funds from new donors. It is envisaged that Deborah and TSIP will work closely together on these two areas of work to ensure their recommendations are mutually complementary. The work will be overseen by the Task and Finish Group, comprising representatives from the London’s Giving Network and the CBT Team, that was established to co-curate additional support of PBGS in London.

Anchor Programme

16. As mentioned in the March 2022 MD's report, a paper is being presented to this meeting on the Anchor Programme, a new fund which aims to strengthen the sector by providing long term funding to organisations aiming to catalyse systemic change. Following a set of Design Group meetings, where civil society organisations and officers were facilitated to work together in co-designing the programme, a funding plan is being presented with the request to allocate up to £20m, in principle, subject to the usual grants assessments and delegated authority protocols.

The Bridge Programme

17. CBT's "Funder Plus" offer, *The Bridge Programme* is an approach connecting CBT grant funded organisations with a range of free, non-financial support to help address a specific issue, whilst enhancing their capacity, resilience, and longer-term stability. Areas of support include: fundraising and business planning, management systems, HR, and governance. The current pilot has been extended by six months to 30 September 2022, to allow more organisations already in the application pipeline to benefit from the programme. The evaluation of the programme along with an internal review will inform future recommendations for the programme to the September Grants Committee.

Philanthropy

18. The Joint Philanthropy Strategy includes the giving of time as well as money and assets. The City Corporation's volunteering offer to its employees, residents and community volunteers therefore falls within the ambit of the strategy. The Corporate Volunteering Manager job-share have deployed their expertise in volunteer management to recruit, train and support employee volunteers stewarding crowds in the build up to and aftermath of the Service of Celebration at St Pauls on Friday 3 June. The event ran very smoothly and has provided a rich cohort of additional volunteers to help champion and contribute to volunteering efforts across the City Corporation.

Communications and Events

19. Communicating CBT's offer with clarity - The Communications Team is nearing completion of a project to make improvements to the way CBT communicates about its funding and non-financial support offers. This collaborative piece of work has involved colleagues from across CBT and has focused on ensuring the key areas of work are fully accessible, understandable, and easily navigable to audiences. Timings have been set by the website development, but the new way of describing the existing funding programmes and wider offer will be rolled out more widely as soon as possible.

20. This project has been informed by extensive user feedback, including interviews, surveys, testing and workshops with real users, potential grantees and CBT officers. These insights highlighted a need for: clarity and consistency in how CBT communicates its funding streams both internally and externally; front-loaded key information where possible; Plain English and familiar, accessible language.

21. Based on the feedback, the following changes will be implemented:

- a. A new structural approach to communicate the different areas of work, splitting the offer by financial and non-financial support, and referring to CBT funding in 3 clear sections:
 - i. Grant funding (all available funding opportunities)
 - ii. Strengthening the sector together (strategic initiatives)
 - iii. Social impact investment (Stepping Stones Fund & CoLSIF)
 - b. Grouping grants by issue-led thematic areas, and importantly, moving away from Connecting the Capital, Positive Transitions and Advice and Support as titles, as research showed they were a barrier for organisations applying for support. This approach allows outreach to lead with key information, giving CBT target audiences the information they need upfront and concisely.
22. A detailed briefing note on the thematic areas and descriptions can be provided. This work does not involve any changes to the existing funding strategy. This work will support and complement the funding strategy by giving officers the tools to communicate with clarity and ensure the CBT offer is fully accessible to all.
23. It is expected that these changes will be rolled out on the new website in late August. Members and the CBT Team will be made aware of the changes and familiarised with the approach before the launch of the new website. An ongoing agile approach will be taken, allowing for iteration in language as areas develop.
24. Centre for London Event: What levelling up means for London – On 29 June 2022, the Centre for London are hosting an event to launch a report, on the challenges for London and Londoners in regard to the Government’s levelling up agenda. The event is part of Centre for London’s year long project to influence Government thinking on levelling up, and CBT’s Associate Director, Dinah Cox, sits on its advisory group. The project is partly funded by CBT and also supported by the City of London Corporation as a major sponsor. The event will be livestreamed on YouTube and available to watch back at your own convenience. Further details can be provided for any Members who may be interested in the event. Alternatively, Members may sign up to attend the event online [here](#).

Impact and Learning

21. Feedback from our funded organisations – Included in Item 15 of today’s paper is an appendix which highlights impact & learning from our funded organisations from February to April 2022. The feedback includes information on average application time, CBT ratings and comments from CBT grantees.
22. Learning Case Study - A CBT learning case study is provided at **Appendix 1**. The case study is about Lewisham Local, a funded organisation dedicated to generating cross-sector collaboration and the giving of time, money and skills for the benefit of the local community in Lewisham. During the pandemic, Lewisham Local coordinated Lewisham’s emergency response, managing the distribution of food and other essentials, and engaging local businesses to support as well. The learning case study demonstrates the issues faced during Covid-19 by

organisations supported by CBT and highlights ways grantees adapted their services and approaches.

23. London Funders Festival of Learning - CBT staff hosted several sessions at the London Funders Festival of Learning, an annual event which brings together a range of funders from across London to share insights and expertise on relevant topics. CBT's Impact and Learning Officer, Jen Durrant, facilitated an interactive session with two of CBT's funded organisations, Clean Break and Alliance for Inclusive Education (ALLFIE) on how funders can work in a more equitable way with communities. Clean Break and ALLFIE both outlined how they work with the people they support in an equitable way, with participatory approaches and involvement in decision making being key, before then discussing how funders could work more equitably with funded organisations. They highlighted the importance of making application processes more accessible, particularly for smaller and user-led organisations which are less likely to have a team of professional fundraisers; the need to shift metrics of success to recognise the more holistic and longer-term support they provide for people; and the importance of core and unrestricted funding to enable them to truly make a difference. The session was attended by approximately 15 representatives from different funders and their comments suggest they found it useful, insightful and thought-provoking; they also each committed to taking an action to advance equity in their organisation as a result of what they heard.

24. Learning Visits - The Impact and Learning team are in the process of trialling a new approach to learning visits, aiming to make them more useful for all involved and to reduce the power imbalance between funder and funded organisation at such meetings. Thank you to those Members of the BHE Board and Grants Committee who attended a briefing about how they may create a positive learning environment during learning visits and to Chair Paul Martinelli and Alderman Sheriff Alison Gowman for attending and feeding back on one visit each as part of this trial. The trial has been delayed due to Covid-related illness and should be completed within the next few weeks, after which the new approach to learning visits will be rolled out. The trial is part of a larger review of impact and learning processes for funded organisations, including approaches to grant reporting and communication with funded organisations about their progress.

Conclusion

25. This report provides a high-level summary of CBT activities since the Grants Committee last met in March 2022. The Grants Committee is asked to note the content of the report. Further information on any of the updates given in this report can be provided to the Grants Committee verbally in the meeting or in a written format in advance of or as a follow-up to the meeting.

Appendices

- Appendix 1 - Learning case study: Lewisham Local

David Farnsworth

Managing Director of Bridge House Estates

E: David.farnsworth@cityoflondon.gov.uk

Appendix 1 – Learning case study: Lewisham Local (formerly known as Rushey Green Timebank)

| | |
|------------------------|---|
| Organisation: | Lewisham Local (formerly known as Rushey Green Timebank) |
| Grant type: | Bridging Divides, Connecting the Capital (continuation funding) |
| Grant amount: | £323,500 over five years from March 2020 for Lewisham Local project Plus £94,000 continuation funding over two years from March 2020 for Wildcat Wilderness project Also received £15,000 small charity emergency Covid funding in April 2020, £73,352 LCRF Wave 2 funding in May 2020 and £35,464 LCRF Wave 3 funding in August 2020 |
| Grant purpose: | Development of scheme to connect assets in the community to give time, skills and resources to boost good causes and grow local pride, fairness and equality. Wildcat Wilderness (continuation): Salary and associated costs of community activities and maintenance in the community green space |
| Covid changes: | Pivoted to coordinating local emergency response, managing food distribution, volunteering and medical pickups across local services |
| Interviewee: | Philippe Granger, CEO |
| Interview date: | 19 th October 2021 |
| Website: | https://www.Lewisham Local.org.uk/ |
| Address: | PLACE/Ladywell Unit C, 261 Lewisham High St, SE13 6AY |
| BBGM ref: | 15883 |

Summary

This is a learning case study about Lewisham Local, a funded organisation dedicated to generating cross-sector collaboration and the giving of time, money and skills for the benefit of the local community in Lewisham. During the pandemic they coordinated Lewisham's emergency response, managing the distribution of food and other essentials, and engaging local businesses to support as well. Their challenge now is helping organisations transition from crisis mode to more long-term thinking given the high levels of demand and loss of volunteers as lockdown has ended.

Their experience highlights a number of key lessons for CBT, the recommendations from which are included at the end of this document.

Introduction

This is one of a series of learning case studies demonstrating the issues faced during Covid-19 by organisations CBT supports and highlighting ways they are adapting their services and approaches. The purpose of these case studies is to identify good practice that CBT, and others, can learn from during this crisis period and as the sector starts to rebuild.

This case study focuses on Lewisham Local (formerly known as Rushey Green Timebank) and draws on information provided in their Impact and Learning report and an interview with their CEO, Philippe Granger.

Note: Since this case study was carried out, Lewisham Local spoke at our Networking and Learning Day for Funded Organisations (1st April 2022) and shared their learning from the pandemic.

What made Lewisham Local unique before the crisis?

Rooted in an ethos of coproduction and cross-sector collaboration, Lewisham Local is all about facilitating connections for people to give time, skills and money for the benefit of the local community in Lewisham.

“We encourage people to come up with ideas for projects and design the future of the organisation with us ... Our vision is around helping people to do good and get involved.”

For example, they created the ‘Lewisham Local’ card, which entitles volunteers to discounts in local businesses. This served to recognise the value of volunteers, support local traders and generate conversations between the voluntary sector, businesses and the council.

“We’re a connector and incubator, we push the boundaries, and we’re very trusted locally, the council sees us as a partner and they know we have this ability to go out and do things, we get things done.”

CBT funds their Lewisham Local project, which aims to develop local giving initiatives – including time, money and skills – and build capacity and assets sharing amongst community organisations in Lewisham.

“Our CBT grant is about becoming a local generator of funds, to drive local giving from employers and businesses. We don’t have big business in Lewisham, we don’t have financially wealthy assets, so our approach is more about connections on the ground, giving support, businesses promoting and supporting local people’s issues.”

CBT has also funded their Wildcat Wilderness project, which provides volunteering activities, forest schools and creative workshops in their community green space to engage local people in nature conservation and food growing.

How did Covid-19 affect Lewisham Local and how did they adapt their provision?

As a trusted port of call for local people, Lewisham Local were faced with a huge increase in demand for support, particularly for essentials such as food, medicine and emergency money.

“We were getting calls at 11pm from people saying they’d run out of money and their electricity was going to get cut off.”

Much of their community and project work had to be put on hold as lockdown began and organisations and local people were swept into crisis mode.

Lewisham Local adapted by immediately stepping in to coordinate the local response, gathering the foodbanks together and instigating the Lewisham Covid Response Hub.

“We had a plan together within three days, by the following Monday we had a website ... We just mobilised straight away.”

They continued to coordinate the emergency response throughout, hosting daily Zoom meetings with partners, collating data on the need for and distribution of food and other essentials, and responding to local people’s immediate needs.

“There were foodbanks, there were autonomous groups giving food out, there were those officially shielding needing food, there were people not officially on the shielding list needing food, there were discussions round what goes in the food box, how much the box costs ... We were the centralised single point of access, we logged all calls for food, medication pickups, errand running, volunteering, bespoke shopping, and coordinated the partners.”

Importantly, they worked to ensure food provision was culturally appropriate; for example, when a local business owner pointed out that people from a Caribbean background were not receiving culturally appropriate food, they worked with him to generate donations from his customers and raised £250 for more appropriate food provision.

How are Lewisham Local adapting as lockdown ends?

In some ways, Covid was helpful for clarifying their mission, integrating them further into the community and breaking down barriers to partnership working.

“Covid has given us a focus and mission that is very clear, it’s about making a difference, whatever we can do in Lewisham to support the voluntary sector’s sustainability. Lots of organisations have let down their walls in the pandemic.”

Since March 2021 Lewisham Local have been returning to their pre-Covid work of connecting with local businesses, developing the voluntary sector and facilitating giving projects; however the damage done by the pandemic and rising food poverty, unemployment and energy bills mean that organisations are not able to engage in the same way.

“We want a thriving engaged voluntary sector, we’re visionaries, but some groups are just trying to make ends meet, get the work done, they haven’t got time to listen to visions. We can’t just go in and say you should do this or that.”

The loss of volunteers as people returned to work is also a challenge, given the pressure the sector is under to meet increased demand.

“During Covid people were furloughed, they were more aware of local issues, thousands got involved, but then they went back to work ... And in lockdown volunteering was very mission-based, you get food and deliver it and you feel great, but now the roles aren’t as short or fun, they require more commitment, more routine, it’s harder for people to commit. There’s been this glorification of volunteers, people think they’re on tap, but it doesn’t actually work like that. We need to lower expectations a bit, advocate for the sector.”

In addition, many of the groups that started up during lockdown are now struggling, so Lewisham Local is supporting them with governance and fundraising advice.

“During Covid lots of people thought they should start a charity, but hadn’t thought through all the systems you need, where’s the money going to come from ... Lots of people on the ground are motivated by compassion but they’re not good at management – but we are good at that so we can support and partner, we know about the finances, planning, governance, we can work together.”

Lewisham Local are also launching a Lewisham Warmer Together initiative to highlight fuel poverty and raise funds for advice services, are developing a Lewisham Community Lottery to increase giving and engagement from across the borough and are the volunteering partner for London Borough of Culture next year.

How could CBT better support Lewisham Local?

In addition to the grants making their projects possible, Lewisham Local has appreciated CBT’s support through the Bridge Programme and being kept up to date with relevant events and opportunities. They highlight, however, that CBT could do more to support new and smaller organisations, particularly around governance.

“If you want to do something really meaningful for us, host some training around governance and leadership for CEOs and Boards. We want organisations to be thinking about governance and leadership that’s more innovative and dynamic. Normal governance training is all about filing accounts, compliance, risk assessments – but we want to hear more about how you can be innovative as a Board, how to include young people or people who are inexperienced.”

In addition, Lewisham Local suggest that CBT could take a more relational approach with them and other funded organisations, having more detailed discussions with them and being open about CBT’s way of thinking.

“It would be really good for CBT to do a session on what is it like to be a funder. The voluntary sector needs to understand more about how you think, it would be great to have that exposure – not everyone has that insight, your customers need to understand how you’re thinking, how you’re approaching things.”

Lastly, Lewisham Local highlight the importance of providing sufficient funding for DEI, training and salaries in addition to project costs.

“Funders need to consider some room for training and DEI, it should be explicit in funding applications so we know you’ve got to put it in. At the moment you don’t have to so when you’re looking to cut the budget it falls off. You also need to encourage organisations to pay well and put in salary increases each year, ask them ‘are you paying pensions?’, say that ‘as a funder we recognise this is important and we’re not looking to fund the cheapest things but quality.”

What can CBT learn from Lewisham Local?

Lewisham Local shows the value of developing cross-sector collaboration and community engagement at all levels to generate funding and amplify the impact of projects; **CBT should consider funding similar cross-sectoral work elsewhere.**

Lewisham Local highlight the pressures the voluntary sector is under and the difficulties they face in thinking in a more visionary way; **CBT could explore how to support organisations to transition from crisis mode to more long-term thinking.**

Lewisham Local point out the need for training on innovative governance and explanations on how funders think; **CBT could incorporate this into its external learning programme.**

Lewisham Local highlight the importance of funding for DEI and training; **CBT could incorporate this into its grant budgets and application processes.**

Finally, Lewisham Local are keen for funders to listen to them and develop funding streams in partnership with those on the ground; **CBT could work more collaboratively with funded organisations to design programmes together.**

“We would be really happy to work with you, come and talk to us and say ‘what could we do in Lewisham, how could we partner on this?’ We have grassroots intel that you don’t have, we could test things out together.”

This page is intentionally left blank

| Committee | Date |
|---|--|
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: Anchor Programme | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> does this proposal aim to support? | 1,3 |
| Which outcomes in the <i>Bridging Divides</i> funding strategy, does this proposal aim to support? | Reducing inequalities, Every Voice Counts, Progressive, Adaptive, Collaborative, Inclusive, & Representative values. |
| Does this proposal require extra revenue and/or capital spending? | No (£20m funding allocation for Bridging Divides Designated Grant Making Fund) |
| If so, how much? | N/A |
| What is the source of Funding? | Bridging Divides Allocation 2022-23 |
| Has this Funding Source been agreed with the Chamberlain’s Department? | Yes |
| Report of: David Farnsworth, Managing Director of BHE | For Decision |
| Report Author: Dinah Cox, Khadra Aden, Clara Espinosa, Aasha Farah | |

Summary

This report requests approval to proceed with the implementation of the Anchor Programme, a proposed new funding stream which aims to grow stronger, more resilient communities for a London that serves everyone. At the heart of this programme is a commitment to achieve change for Londoners at a systemic level, by providing long term funding to civil society organisations (CSOs). In addition to providing financial sustainability, by funding organisations rather than projects over an extended period, the fund aims to achieve the following:

- a. Capacity building: improving capacity for funded CSOs to engage in positive structural change
- b. Wider knowledge sharing within civil society
- c. More equitable outcomes for London’s marginalised communities
- d. A rebalanced funder, grantee relationship with a deep focus on the funded organisations’ learning journey

A summary of the programme timeline is included at appendix 1.

Recommendation

The Grants Committee is recommended to:

- i) Allocate up to £20m, in principle, to be committed between 2022/23 and 2024/25, and subject to the usual assessment (including financial assessment) and delegated authority protocols, towards “Anchor Programme” grants which meet the proposal/guidelines set out in this report.

Main Report

Background

1. Following an update in the March Managing Director’s report, which outlined the process that would be followed to implement recommendation six of Interim Review of Bridging Divides recommendations (see 2(a) below), this report outlines the details of the programme. The update noted that a group of sector representatives (referred to later in this report as the “design group”) would be convened and resourced to advise officers in producing a co-designed funding plan for the Anchor Programme. This initial scoping work with the design group has now taken place, and the plans set out in this report reflect the co-designed principles and processes.
2. On 25 March 2021, the former City Bridge Trust (CBT) Committee agreed 11 recommendations, including recommendation six:
 - a. In principle, to long-term (up to 10 years) core fund a cohort of London’s representative anchor organisations vital to supporting the conditions for a progressive and inclusive London civil society. Also, to request officers to prepare a short-list of such organisations for consideration (CBT) would then work with them to learn how to further improve its own funding approaches, including how best to support localities in response to the ascendance of communities, rise in collaboration, increase in volunteering, role of Place Based Giving Schemes and development of Mutual Aid Groups).
3. Furthermore, on 9 March 2022, the Grants Committee received a report on ten-year grants that set out the conditions under which awarding such grants would be acceptable. This included the following statements, which have all fed into the design of the anchor programme:
 - a. Research by Social Innovation Exchange¹ builds on and supports the concept that truly long-term funding is a pre-requisite for systemic work, highlighting the following findings/recommendations:
 - i. There is a need to build capacity for systemic work beyond just projects.
 - ii. The value of this work needs to be evidenced, which means long term curation of resources and shifting away from short term outcomes.
 - iii. Funders need to connect to practitioners on the ground more authentically.
 - iv. New funding mechanisms are needed that support sustainable long-term models.

¹ [Social Innovation Exchange, 2017: Funding Systems Change: Challenges and Opportunities](#)

4. The same report set out several provisions which protect CBT against risk when awarding grants over a long-term period. To avoid duplication these are summarised in **Appendix 3**.

Anchor Programme – Background

5. The Anchor Programme aims to strengthen the sector by providing long term funding to catalyse systemic change, through a collaborative and equitable funding programme. It will contribute to an environment in which the sector can creatively problem solve without the restrictions of shorter-term funding, giving organisations the space to collaborate and take risks. Whilst CBT has recognised the importance of dealing with the effects of disadvantage for many years in its responsive grant making, it has also focused on strategic funding, believing that addressing systemic inequality is vital. The Anchor Programme will continue this tradition, creating the capacity for systemic work to take place whilst also contributing to the strengthening of London’s voluntary and community sector.
6. After initial in-house conversations with staff and Members of the BHE Board and Grants Committee, CBT hosted a facilitated roundtable session in February 2022. An external facilitator, The Social Innovation Partnership (TSIP), was utilised. TSIP helped address the power dynamic and mitigate the risk of a top-down imposed approach undermining the principles of collaboration and equity which underpin the Anchor Programme. A total of 15 voluntary and community sector, civil society organisations (CSOs) attended the initial roundtable session and shared their thoughts and initial ideas on what the Anchor Programme might aim to achieve, and how. The list of attendees, many with an equity focus, was developed via staff suggestions and discussions with other funders with expertise in specific sectors.
7. Following the initial roundtable session, five design sessions took place over the course of two months, attended by 22 CSOs. These included many of the original roundtable participants, as well as others suggested by them (to attempt to include those representing communities not originally “around the table”). The design group participated in the development of the Anchor Programme plan set out in this report and the facilitated sessions proved successful as it was clear that the organisations involved were enthusiastic about sharing their thoughts on the fund. Participants reported that they appreciated having a say in how funding should be given, what it should be used for and where it should go as well as advising on what the processes involved in applying and reporting should be.
8. Organisations such as LGBT+ Consortium, Inclusion London, and HEAR equality, with which CBT has a long history of partnership, have been key to the development of the programme. See **Appendix 2** for a list of all design group participants.
9. To embody equitable funding practice, participants were resourced to participate in the design group. A total of £74,250 was awarded to 22 organisations in developmental grants. These grants were for the organisations to use for any purpose

providing that it would benefit Londoners (i.e., it was a grant towards their core activity) rather than to directly recompense them for their time. The amount awarded varied between £3,000 to £3,750, with organisations with lower incomes receiving slightly more to acknowledge the greater relative impact of attending the sessions/providing consultation. Participants will also be resourced to participate in the future design and delivery of the fund. In the design sessions several anchor organisations voiced the opinion that funders should be providing more capacity support as a way of understanding that not all charities have the same resources and that providing monetary funding is not enough.

10. One of the reasons that this work is important is that funding over an extended period builds lasting relationships with funded organisations, allowing for the maximum potential benefit of our total assets – it takes time to develop rapport and understand where the unique assets of BHE's corporate Trustee, the City Corporation, might best be harnessed to support an organisation. Deeper relationships may provide the potential to leverage and test non-monetary support from within the City Corporation in currently under-exploited ways.

Anchor Programme - Proposal and timeline

11. The overarching principles of the Anchor Programme are to support civil society anchor organisations who have the ability and a commitment to achieve change for Londoners at both a systemic and systems-change level. Most of these will have an equity focus and work primarily with marginalised communities/communities with protected characteristics (either specific communities or working intersectionally).
12. Together with the design group, officers propose the following overarching eligibility criteria:
 - a. Organisations which are well grounded within their community and demonstrate this by reducing inequality and growing resilience.
 - b. Organisations which have activities that encompass more than only frontline service delivery; they must additionally (or solely) undertake work which connects, convenes and catalyses other organisations to benefit the community or communities they serve.
 - c. Organisations which are led by and for those they serve or have an ethos of ensuring that the voices of their communities strongly inform their activities.
13. Over the first three years of the Anchor Programme, a learning partner will be appointed to capture internal learning about CBT's own grant making practice, begin to understand the impact of the grants over time, and to support the ongoing inclusion of CSOs working in collaboration with officers. Tenders have been received and are currently being reviewed by officers.
14. An assessment process will be co-developed, by officers and the design group, enabling the prioritisation of organisations as set out in the eligibility criteria in point 12 above.

15. It is proposed that Anchor Programme grants cover 7-10 years, with larger grants being a maximum of £150,000 per year.
16. Subject to suitable assessment and other programme processes being designed and implemented in time, it is hoped that the programme will launch in September 2022. Grants will be awarded over several rounds, with the exact number of rounds depending on the number and value of grants awarded, input of the design group, and input of the learning partner.
17. A portion of the budget will be ringfenced for smaller organisations (and this will be publicised), to encourage applications from a diverse range of organisations serving marginalised communities. This element of the programme design directly reflects the input of the design group.
18. Officers will ensure that a robust assessment and monitoring protocol is undertaken which is in line with CBT's usual approach. Grants of ten-years will likely be over £500,000 and as such will be considered by the Grants Committee before recommendation to the BHE Board.
19. A grants advisory panel (or similar arrangement), made up of CSO representatives with relevant professional and lived experience (which may include the design group members) and officers, will be established to make recommendations to CBT. However, grant recommendations themselves will be written by Funding Managers (or equivalent BHE officers) and recommendations will be approved in the usual way following the established BHE protocols.

Corporate and Strategic Implications

20. Strategic implications - The BHE strategies supported by the recommendations in this report are the charity's overarching strategy, *Bridging London 2020 – 2045*, its charitable funding strategy *Bridging Divides*, its *Philanthropy Strategy* and the *Climate Action Strategy 2020-2027*.
21. Financial implications - Any proposed initiatives for the 2022/23 financial year are costed and included in the relevant approved budgets, which include funding for both grant commitments and related operational costs. Costs over further years will be included in the relevant budgets for those years. The £20m in grants will be awarded from the designated fund for grant making and the administration costs will be allocated to the operational element of the uplift funds as agreed at the time the uplift was approved.
22. Resource implications - All resourcing needs for 2022/23 are costed into the relevant budgets for 2022/23. Costs over further years will be included in the relevant budgets for those years.

23. Legal implications - This report and its recommendations should be considered based on what is solely in the best interests of the charity, BHE.
24. Risk implications - Risks and mitigations inherent in the funding process are captured in CBT's operational risk register. With specific reference to the implementation of any agreed recommendations of this review, there is a risk that if sufficient and appropriate resource is not committed to the operational budget, the deployment of additional funds and ambitions for change will be inhibited.
25. Equalities implications - The City Corporation's Public Sector Equality Duty (PSED) applies to the exercise of the City Corporation's local authority functions only. Nonetheless *Bridging Divides* has an explicit focus on reducing inequality, and many of the initiatives which are supported through the activities of CBT are also focused on this objective. The continued implementation of *Bridging Divides* is therefore expected to positively address inequality alongside the City Corporation's separate discharge of the PSED. The Anchor Programme aims to support CSOs that have an equity focus, working closely with marginalised communities to address systemic inequalities. Through this equitable funding programme, organisations will have the space to collaborate and work towards systemic change without the limitations of short-term funding.
26. Climate implications - CBT is committed in its foundational values to being 'Environmentally Responsible'. Future practice and deployment of charitable funding will be anchored in this and have the potential to make a greater positive impact on alleviating the causes/impact of the climate crisis: for example, through further development of the Greening London Programme and work through the Climate Action Strategy (see above).

Conclusion

27. This report describes the details of the Anchor Programme and the process that will be followed prior to its launch, which is planned for September 2022. It requests that the Grants Committee agree to allocate £20m from the designated fund for grantmaking. It is envisioned that the money will be awarded in onward grants over the next three years. It also sets out the underlying principles and rationale for awarding a limited number of grants in specific grant programmes over such a long time, outlining the potential to catalyse systemic change and support London's voluntary and community sector for the future.
28. This proposal is in line with CBT's PACIER² values of being progressive, adaptive and collaborative. Progressive in the way the funding strand is being designed and what it aims to achieve. Adaptive in the way CBT is open to question its application and monitoring processes, allowing organisation in the design group to express the inequalities faced when it comes to applying for funding. Collaborative in the way the

² PACIER = Progressive, Adaptive, Collaborative, Environmentally Responsible, Representative.

programme will aim to share learning and create space for organisations involved (those assessing as well as receiving grants) to connect with one another and to have a voice.

Background papers

- Report to the City Bridge Trust Committee, entitled 'Interim Bridging Divides Review Recommendations', dated 25 March 2021, Item 15.
- Report to the Grants Committee of the Bridge House Estates Board, entitled 'Ten-Year Grants', dated 9 March 2022, Item 20.

Appendices

- Appendix 1 – Summary timeline
- Appendix 2 – List of design group members
- Appendix 3 – Risk Mitigation

Dinah Cox

CBT Associate Director

E: Dinah.cox@cityoflondon.gov.uk

Khadra Aden

Funding Manager

E: khadra.aden@cityoflondon.gov.uk

Clara Espinosa

Funding Manager

E: clara.espinosa@cityoflondon.gov.uk

Aasha Farah

Funding Manager

E: aasha.farah@cityoflondon.gov.uk

Appendix 1: Summary timeline



Appendix 2: List of design group members

- Age UK London
- All Ways Network
- Breaking Barriers
- Community Action for Refugees and Asylum Seekers (CARAS)
- Casalatina
- Child Poverty Action Group (CPAG)
- Council of Somali Organisations
- Do it Now Now
- End Violence Against Women Coalition (EVAW)
- Housing Associations Charitable Trust (HACT)
- HEAR Equality
- Inclusion London
- Interlink Foundation
- LGBT+ Consortium
- London Play
- London Plus (aka Greater London Volunteering)
- London Youth
- Partnership for Young London
- Sisters of Frida
- Spectra
- Voluntary Action Harrow
- Women for Refugee Women

Appendix 3: Risk Mitigation (excerpt from previous paper received by the Grants Committee on 9 March 2022).

Excerpt 1:

In the case of all grants awarded, the standard grant terms and conditions³ apply, which, amongst other terms, include the following particularly relevant provisions:

| General provisions | Monitoring and evaluation provisions |
|---|---|
| Application of additional terms and conditions if the grantholder is not complying with the grant agreement; and/or if CBT believes such conditions are necessary to ensure the project is delivered as agreed. | Review of written monitoring reports, visits (with or without notice) and comprehensive reviews of records kept by grantholders. |
| Unused funds to be returned, and grantholders to promptly notify CBT of unused funds. | Grantholders agreeing to be available for meetings with CBT, allowing full and free access to such records as necessary, as well as to employees, agents and premises for CBT to monitor the project. |
| Payment of grants in quarterly instalments | Provision of appropriate oral or written explanations where CBT requests them. |
| Payment of the grant (or any part) may be withheld if CBT believes it will not be applied to the project as agreed or if monitoring is not satisfactory. | Prompt notice of any variation to or decrease in the project outcomes; or of any financial or other difficulties which can have a material impact on effective delivery of the project or compliance with the grant agreement. |
| Withholding, suspending, or requiring repayment of a grant in a wide range of circumstances e.g. <ul style="list-style-type: none"> • grantholder uses the grant for purposes other than for the project • satisfactory progress has not been made; provision of materially misleading or inaccurate information; | <p>Completion and return of regular monitoring reports as required by CBT, using the forms and/or instructions sent by CBT and in accordance with CBT specified timescales.</p> <p>Further updates on the progress of the project on request and provision of further information and documents as required by CBT.</p> |

³To reduce the size of your papers pack a copy of the grant terms and conditions has not been appended but can be provided by email on request.

| | |
|---|--|
| <ul style="list-style-type: none"> • significant change of purpose, ownership or beneficiaries so that the grant is unlikely to fulfil the purpose for which it was awarded; • grantholder becomes ineligible to hold the funds; • duplicate funds received • fraudulent, dishonest, negligent activity | <p>Provision for CBT to impose additional monitoring requirements should it deem them necessary.</p> |
|---|--|

Excerpt 2:

If officers consider it appropriate in light of their assessment of the risks of awarding a grant, they also have discretion to include further tailored grant conditions. For example, due to the uniqueness of The Prince’s Trust grant (at the time), triennial reviews including a detailed monitoring framework tailored to CBT’s agreed specifications were included as a further condition of grant. Officers recommend, however, that these measures are used in moderation and only when absolutely necessary, as a conditional grant may not be considered a commitment in accounting terms and identifying appropriate timing of recognition has financial reporting and administrative resourcing implications.

Utilising the provisions of the grant terms and conditions and applying a flexible lens, CBT’s Funding Managers employ a case-by-case approach to grant management. Annual reporting is rigorously analysed, including reviews of financial information which Funding Managers use to determine the grantholder’s ongoing sustainability.

As with CBT’s usual in-house grants assessment process, the longer the grant duration the more robust the assessment and monitoring, and as such any grants awarded for ten-year durations will be subject to the most rigorous protocols. As noted in the companion paper these grants will be approved following the standard delegated authority procedures; grants of ten-years will likely be in the £500k+ range and as such will be considered individually by both the Grants Committee and the BHE Board. It is likely that there will be a focus within CAR on partnerships and collaborations, for the longer-term grants (including ten-year grants) further reducing the risk of an overreliance on a single funder.

For grants awarded under the Anchor Programme, if ten-year grants are approved in principle by the Grants Committee, a robust assessment will take place following CBT’s standard procedures. A bespoke monitoring framework will be devised, which will incorporate checks and balances during the grant period as well as assessment of the ongoing sustainability of the funded organisation. There is scope for example to include a more in-depth monitoring report at the half-way point (or some other point) to ensure that sufficient progress is made. A learning partner will be appointed, the remit of which will include feeding into the development of the monitoring framework as part of its overarching impact and learning remit.

In the case of both CAR and Anchor, CBT's usual grant terms and conditions will apply, as summarised above. In addition, further assessment measures will be incorporated, which apply uniquely in the case of such long-term awards. For example, the organisation's policies around key person risk, succession planning, etc.

This page is intentionally left blank

Bridging Divides Eligibility Criteria

| | |
|---|---|
| <ul style="list-style-type: none"> Registered charity Registered Community Interest Company Registered Charitable Incorporated Organisation Registered charitable industrial and provident society or charitable Bencom Charitable company Exempt or excepted charity | <ul style="list-style-type: none"> Revenue grants cannot amount to more than 50% of an organisation's turnover/income in any one year 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 Grants must benefit inhabitants of Greater London |
|---|---|

Bridging Divides Programmes

| Connecting the Capital | Positive Transitions | Advice and support |
|--|--|--|
| Under review (Transition funding applicable) | | |
| Voice and leadership | Specialist support services working with children and young people. | |
| Growing, greening and environmental projects | Specialist support services for older people. | |
| Arts, sports, health and/or well-being projects for D/deaf and disabled people | Mental health support and services for people who are experiencing or at risk of homelessness or are vulnerably housed | |
| Arts, sports, health and/or well-being projects for older people | | |
| Reviewed and un-paused | | |
| Infrastructure funding: capacity building and representation | Support for refugees, asylum seekers and migrants | Provision of advice and support to disadvantaged individuals |
| Increasing the quality and scale of giving | Support and services for deaf and disabled people | Food poverty |
| Place-based giving schemes | Tackling abuse, exploitation, and hatred | |
| Eco-audits | Criminal justice: Building settled lives for those leaving custody or serving community sentences. | |
| Access audits | | |
| Access improvements to community buildings | | |
| Pending review, but un-paused | | |
| Small grants programme | | |

This page is intentionally left blank

| Committee | Date |
|---|---|
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: Strategic Initiative - Action for Race Equality — Windrush Justice (Ref: 19453) | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support? | 1,3 |
| Which outcomes in CBT’s funding strategy, <i>Bridging Divides</i>, does this proposal aim to support? | Reducing inequalities, Progressive, Collaborative, |
| Does this proposal require extra revenue and/or capital spending? | No (£400k funding allocation from Bridging Divides designated grant making fund) |
| If so, how much? | N/A |
| What is the source of Funding? | Bridging Divides allocation 2022-23 |
| Has this Funding Source been agreed with the Chamberlain’s Department? | Yes |
| Report of: David Farnsworth, Managing Director of BHE | For Decision |
| Report Authors: Tim Wilson, Funding Director and Anneka Singh, Funding Manager. | |

Summary

This report requests funding of £400,000 over three years as a strategic initiative to Action for Race Equality for the Windrush Justice programme, a pan-funder initiative developed by the Paul Hamlyn Foundation.

City Bridge Trust (CBT) has a long-standing engagement with issues of immigration and advice. The Windrush Justice programme seeks to resource grassroots community groups via an intermediary organisation trusted by the sector. These groups will then be in a stronger position to engage with the Home Office’s Windrush Taskforce. Funding seeks to redress the very low levels of compensation awarded to victims of the Windrush Scandal to date.

Recommendation

The Grants Committee is recommended to:

- i) Approve £400,000 over three years (£160,000; £160,000; £80,000) to Action for Race Equality towards the pan-funder Windrush Justice programme. City Bridge Trust’s funding is restricted to the small grants, capacity building, and convening elements of work, with all monies restricted for the benefit of Londoners.

Main Report

Background

1. The focus of this proposed strategic initiative is work to build the capacity of smaller, Black-led community groups who are otherwise under-resourced to seek justice, compensation and policy change following the discriminatory detentions, deportations and criminalisation resulting from recent updates to immigration and asylum legislation.
2. In June 1948, the Merchant Vessel Empire Windrush docked in Tilbury, Essex, bringing 492 people from Caribbean countries to help meet the needs of the post-war UK labour market. People who arrived in the UK from Caribbean countries between 1948 and 1971 are considered to be the Windrush generation.
3. The Government's Hostile Environment Policy and changes to immigration law in 2014 and 2016 meant that long-standing UK residents previously afforded settlement under the 1971 Immigration Act (and who believed they were British citizens), were suddenly deemed to be 'overstayers' with no right to remain.
4. The Hostile Environment policy introduced a requirement which placed the onus on people to provide evidence that they resided in the UK legally, to access employment and services. Most people who arrived in the UK from Commonwealth countries prior to 1973 lacked the required documentation as they were British citizens upon arrival and did not need to apply for British citizenship. This resulted in many instances of unlawful detention deportation, loss of income, employment, and denial of healthcare and is referred to as the Windrush Scandal. In 2018 the National Audit Office found the Home Office had ignored warnings of the impending scandal and had failed to protect people's rights to live, work and access services in the UK.
5. Windrush is widely viewed as a racial injustice given that most of those affected were Black British people whose family origins were in the former UK colonies of Ghana, Nigeria, Jamaica, and Barbados. In 2020 the Equality and Human Rights Commission said that the Home Office had broken the law in failing to obey public sector equality duties by not considering how its policies affected Black members of the Windrush generation.
6. Whilst the Government's Windrush Compensation Scheme of April 2019 aims to compensate those affected, effective implementation of this scheme has been slow, with claimants receiving low value pay-outs. The application process is complex, and many potential claimants are hesitant to seek help to access compensation, in part due to a lack of trust in the Home Office, who is administering the scheme. To date, only 5% of Windrush victims are understood to have received compensation four years after the National Audit Office report.
7. Whilst the Home Office published an improvement plan in September 2020, it has yet to enact any of the recommendations from its own review of lessons learned from Windrush.
8. In 2020, and following open tender, Paul Hamlyn Foundation (a UK-based funder) commissioned research from a practicing lawyer into the gap between the ongoing

needs of Black British communities to achieve Windrush-related justice, compensation and policy change, and actual levels of service provision. PHF subsequently convened funder and grassroots Windrush group meetings to discuss possible action. The result was a proposal for a pan-funder initiative to resource advice, advocacy, community events, service delivery, research, arts, oral history, media engagement and evaluation.

9. Paul Hamlyn Foundation’s research noted the relatively high levels of poverty amongst those affected by Windrush and the low levels of trust people felt in engaging with the Home Office’s Windrush Taskforce. In this context, grassroots civil society organisations were identified as having a significant role in championing the rights of individuals affected by Windrush and ensuring the issue remains in the public domain.
10. To reach and resource grassroots groups (which large charities often struggle to do) funders will pool their grants with an intermediary. This is intended to improve equity and accessibility by minimising the need for groups to submit multiple applications to a variety of potential funders.
11. Paul Hamlyn Foundation has identified Action for Race Equality (ARE) as the appropriate lead body. By having overall management, ARE will work to:
 - a. direct funding to grassroots groups,
 - b. invest in capabilities for advice, public affairs, and organisational development,
 - c. support convening amongst Windrush grassroots groups,
 - d. maintain the focus on Windrush.
12. Work is also expected to result in active engagement with the Home Office taskforce.

Action for Race Equality – background and recent funding history

13. Action for Race Equality (ARE) is the new name for the registered charity previously known as BTEG (Black Training and Enterprise Group). The organisation was established in 1996 and works to end race inequality for Black, Asian, and mixed heritage communities. It delivers its mission through a range of programmes, educational work, training, consultancy, policy, and research. ARE seeks to address the causes and consequences of racial inequality. Well regarded by policy makers, ARE has acted in an advisory capacity to several Government Departments. The charity is closely involved with the “Moving on Up” project, which CBT and Trust for London are supporting to increase employment rates amongst young black men in London.

Funding History

| ID | Type | Meeting Date | Decision |
|-----------|---------------------------------|---------------------|---|
| 16138 | COVID19 Small Charity Emergency | 13/05/2020 | A one-off, unrestricted grant of £13,750. |

| | | | |
|-------|------------------------|------------|---|
| | Support Funding | | |
| 14540 | Investing in Londoners | 02/05/2018 | £110,000 over two years for the "BAME Connectivity Programme". |
| 12410 | Investing in Londoners | 27/11/2014 | £165,000 over three years for the "Valuing Volunteers Project. |
| 11656 | Working with Londoners | 04/09/2013 | Application withdrawn. |
| 10529 | Working with Londoners | 17/02/2011 | £110,000 over two years towards a programme of bespoke personal and organisational development for BME organisations across London. |

Background and detail of proposal

14. The work has several elements and CBT's funds are proposed for:
 - a. a rapid small grants programme,
 - b. a bespoke capacity building programme,
 - c. resource for convening and connecting.

15. The small grants programme will distribute funds quickly using a proportionate assessment and due diligence process modelled on Covid-19 emergency grant-making. Awards of £5,000 - £20,000 to around 20 organisations will contribute to existing work that is otherwise currently unfunded, resource convening between grassroots groups, and covering some paid time for organisations to engage in capacity building. In total, we assume £470,000 will be distributed via small grants.

16. The capacity building programme will focus on organisational development, fundraising, governance, media engagement, policy influencing, and work towards OISC accreditation (Office of the Immigration Services Commissioner – the body which regulates immigration advisers). An indicative budget of £280,000 is expected for this element of the work.

17. The convening programme will resource connections between Windrush grassroots groups themselves, and their connections to funders and the wider migration sector. A total budget of £100,000 is expected for this work.

18. Other elements (additional to, but beyond what CBT's proposed resourcing) cover national influence to keep Windrush visible in the public and political spheres, and policy development. The three areas recommended for CBT's focus match closest to our current funding policy, and the benefit of the pan-funder approach is how different organisations can resource different elements of an overall programme.

19. The total cost of work is expected to be £1,060,000 and to run for three years. Funding includes provision to resource ARE's delivery staff and overheads

20. Paul Hamlyn Foundation (PHF) has committed £400,000 towards the work and identified other funders who are expected to provide around a further £300,000. A contribution from CBT that matches PHF's award would resource the work in full and enable delivery of work as planned.

21. Officers have spoken to Paul Hamlyn Foundation about restricting CBT's funds to Londoners, which it believes is achievable.

Financial information

22. ARE is supported by trusts, foundations, and statutory sources. Its income increased by 88% in 2020/2021 (compared to 2019/20), due to increased success with obtaining grants. This growth is currently sustained and projected to remain so in 2022/23. It achieved a sizeable surplus in 2021, of which a proportion is designated for service development, research and transfers. Its reserves policy is to hold 'free reserves equivalent to approximately six months of charitable spending'. It currently holds free reserves equivalent to 5 months of charitable spending. Although free reserves are projected to be below target, ARE is reporting consistent surpluses and is expected to remain in a healthy financial position for the duration of the grant award.

| Year end as at 31 March | 2021 Signed Accounts £ | 2022 Forecast £ | 2023 Budget £ |
|-----------------------------------|---------------------------------|-----------------------|---------------------|
| Income & expenditure: | | | |
| Income | 807,331 | 885,022 | 913,900 |
| Expenditure | (612,925) | (810,800) | (889,000) |
| Surplus/(deficit) | 194,406 | 74,222 | 24,900 |
| Reserves: | | | |
| Total restricted | 131,451 | 96,402 | 125,402 |
| Total unrestricted | 345,410 | 454,681 | 450,581 |
| Total reserves | 476,861 | 551,083 | 575,983 |
| Of which: free unrestricted | 253,933 | 363,204 | 359,104 |
| Reserves policy target | 306,463 | 405,400 | 444,500 |
| Free reserves over/(under) target | (52,530) | (42,196) | (85,396) |

Conclusion

23. The proposed strategic initiative complements CBT's focus on service delivery via its advice and migration funding. It will build sector capacity to engage with a government taskforce that has been criticised for underperformance and increases the potential for compensation to those impacted by the Windrush Scandal.

Appendix

- Appendix 1: Strategic Initiative Filters

Tim Wilson

Funding Director & Social Investment Fund Manager

E: tim.wilson@cityoflondon.gov.uk

Appendix 1 – Strategic Initiative Filters

| | |
|--|------------|
| FILTERS | |
| <i>Will The pro-active grant:</i> | |
| Further the Trust's Vision and Mission (a fairer London & tackling disadvantage)? | Y |
| Support work within one of existing Bridging Divides programmes (BD)? | Y |
| Or, meet a clear need that has arisen since (BD) were agreed? | |
| Have the potential for impact beyond that of an individual reactive grant or number of individual grants? | Y |
| Be affordable within the agreed annual budget (from the Trust alone or in combination with other funders) and, looking forward, leave sufficient budget to meet anticipated pro-active grants for the remainder of the financial year? | Y |
| Be made to an organisation(s) that conforms to the Trust's eligibility criteria and has the capacity and expertise to deliver the work? | Y |
| PRIORITISATION GUIDANCE | |
| Evidence | |
| Is there external and/or internal research and information that supports the need for the proposed grant? | Y |
| Is there external and/or internal research and information that indicates the approach proposed in the grant will be successful? | Y |
| Is there evidence that indicates the work will be hard to fund from other sources? | Y |
| Impact | |
| Will the grant tackle a root cause(s), or positively influence policy or practice? | Y |
| Will the work/approach funded be replicable? | Y |
| Does the grant provide an opportunity to strengthen Civil Society in London? | Y |
| Is the work sustainable beyond the period of the grant? | Tbc |
| Can the impact of the work be measured through evaluation? | Y |

| Committee | Date |
|---|--|
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: Strategic Initiative – Place2Be (Ref: 19322) | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support? | 1,3 |
| Which outcomes in CBT’s funding strategy, <i>Bridging Divides</i>, does this proposal aim to support? | Reducing inequalities, Positive Transitions, |
| Does this proposal require extra revenue and/or capital spending? | No (£363,940 funding allocation from Bridging Divides designated grant making fund) |
| If so, how much? | N/A |
| What is the source of Funding? | Bridging Divides allocation 2022-23 |
| Has this Funding Source been agreed with the Chamberlain’s Department? | Yes |
| Report of: David Farnsworth, Managing Director of BHE | For Decision |
| Report Authors: Geraldine Page, Funding Director | |

Summary

This report requests funding of £363,940 to Place2Be over four years as a strategic initiative to carry out a longitudinal research study to explore the long-term impact of one-to-one school-based counselling.

This research is important for Place2Be in advancing its research strategy, but its impact has reach across London and the rest of the UK in raising awareness and improving understanding of the importance of early intervention in children and young people’s mental health.

Recommendation

The Grants Committee is recommended to:

- i) Approve funding of £363,940 to Place2Be over four years (£122,271, £95,425, £97,904, £48,340) to carry out a longitudinal research study, to explore the long-term impact of one-to-one school-based counselling, supporting the case for early intervention in mental health.

Main Report

Background

1. 1 in 6 children now have a diagnosable mental health condition, often continuing into adulthood and the situation is worsening. Up to 1.5 million children and young people across the UK will need mental health support as a direct consequence of COVID-19, 500,000 of whom had no previous mental health problems before.

2. Place2Be’s evidence shows that children and young people’s mental health consistently improves following their experience of one-to-one counselling. It knows that 72% of children and young people’s wellbeing improves according to their parents and 64% according to their teachers. In addition, the mental health of around half of those with the most severe difficulties improves sufficiently at the end of their counselling so they no longer have severe mental health difficulties.
3. However, a key gap in the evidence, is the long-term impact of one-to-one counselling with children and young people. There is also a lack of evidence more widely of the longer-term impact of intervening early. Place2Be are seeking to address this gap by enhancing its understanding of who benefits most or least from counselling over the longer-term, to develop its practice and to support the case for early intervention with funders, commissioners, and policy makers. A central pillar to Place2Be’s work is to listen to and involve the children and young people its supports.

Place2Be – background and recent funding history

4. Place2Be, a registered charity, is the UK’s leading provider of school-based children’s mental health services. Over the last 27 years, it has provided emotional and therapeutic support and expert training to improve the wellbeing of children, young people, parents, and teachers, through its ‘whole school approach’ to mental health. Place2Be’s vision is for all schools in the UK to have access to high quality, effective and evidence-based mental health support. It intervenes early to prevent life-long mental health issues developing, equipping children with the skills to cope with life’s challenges, enabling them to focus on their education and realise their potential. Services are based within each school, which allows them to become part of the school community. Place2Be currently works with 492 schools nationwide with the support of over 1000 volunteers. The charity also provides training and accredited qualifications for professionals working with children.

Funding History

| ID | Type | Meeting Date | Decision |
|-------|------------------------|--------------|--|
| 13367 | Investing in Londoners | 24/11/2016 | £159,690 over three years (£51,920; £53,220; £54,550) towards the full time salary (36 hrs/wk) of the Brent and Ealing Service Manager. |
| 9521 | Working with Londoners | 10/09/2009 | £111,000 over three years (£35,000, £37,000, £39,000) towards salary costs of a London Development Manager supporting and expanding mental health services for children in London. |

Detail of proposal

5. The longitudinal study will include children and young people aged 4-16 across Place2Be participatory schools in London. It will disseminate this research to academics, policy makers, commissioners, funders, mental health practitioners and education professionals, which will help inform mental health understanding and practice, to help ensure the most appropriate mental health support is provided to each child across London and beyond.

6. The study will focus on children and young people aged 4-16 in London to look at the effects and cost-benefits of individual counselling by Place2Be with the following objectives:
 - a. To describe the mental health and educational outcomes of children and young people who access Place2Be support in primary and secondary schools in London in comparison to similar children from existing data sets.
 - b. To explore the cost-benefits of access to individual counselling over time
 - c. To investigate whether any differences in outcomes are associated with the nature of the initial mental health difficulties and/or characteristics of the children and young people
7. All Place2Be schools across the London boroughs will be asked to participate in the research and all children referred into Place2Be from September 2022 will be invited to take part in the longitudinal study. It is currently in 158 schools in London, but in line with its expansion plans, it anticipates being in approximately 200 schools by September 2022.
8. Place2Be's research and evaluation is guided by its own Research Advisory Group (RAG), chaired by a former Director of Mental Health at Public Health England, and comprises of external experts, Place2Be Trustees, and key members of its staff teams. The learning from this longitudinal research study will be shared with a range of relevant audiences including policy makers, commissioners, funders, mental health services, mental health practitioners and education professionals including teachers and pastoral workers. Place2Be anticipate contributing the following learning points through the research study:
 - a. Evidence of the improvement in the mental health of children and young people in London after they receive counselling.
 - b. The extent to which improvement is sustained and the impact of intervening.
 - c. The factors that are associated with improvement (such as demographic characteristics and geographic location) that could contribute to better targeting of mental health services.
 - d. The cost-benefit of addressing mental health difficulties at an early stage.
9. Dissemination to reach these audiences will be through a multi-pronged approach and Place2Be will work with its networks to maximise the impact of the learnings, which includes published papers in peer-reviewed journals, articles in specialist mental health and educational journals, a round table of policy makers and commissioners, a pan-London online dissemination event for practitioners, press releases and through Place2Be's website, networks and social media channels. If a sufficiently large sample of children and young people remain engaged with the research throughout, Place2Be aims to continue to follow up with these children and young people to explore their mental health into their early adult life, and to measure whether improvement is further sustained.

Financial information

10. Place2Be's financial model is based on a mix of income streams – schools, commissioners, and voluntary income. In addition, it continually reviews and refines its fundraising portfolio, which has become even more critical as a result of Covid-19. It has adapted its income generating strategies, accordingly, placing less

emphasis on events. At 31st March 2021 the charity's unrestricted free reserves were slightly below target of 3 months' worth of total expenditure. Unrestricted designated reserves include the Development and Strategic Priorities Fund of £4.5m. The purpose of this fund is to assist growth of the organisation's future capability. The organisation plans to use this fund over a 3 year period to improve its future capability which explains the planned deficits in 2021/22 and 2022/23. Income in 2022/23 is expected to increase in line with Place2Be's plans to expand to more schools across the country. Match funding of £45,000 is secure.

| Year end as at March | 2021 | 2022 | 2023 |
|-----------------------------------|-------------------|--------------------|--------------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 19,305,000 | 18,541,000 | 24,661,255 |
| Expenditure | (18,965,000) | (19,907,000) | (26,496,838) |
| Gains/(losses) | 110,000 | 0 | 0 |
| Surplus/(deficit) | 450,000 | (1,366,000) | (1,835,583) |
| Reserves: | | | |
| Total endowed | 0 | 0 | 0 |
| Total restricted | 947,000 | 646,999 | 346,899 |
| Total unrestricted | 14,806,000 | 13,740,001 | 12,204,517 |
| Total reserves | 15,753,000 | 14,387,000 | 12,551,416 |
| Of which: free unrestricted | 3,789,000 | 4,267,000 | 4,801,000 |
| Reserves policy target | 4,741,250 | 4,976,750 | 6,624,210 |
| Free reserves over/(under) target | (952,250) | (709,750) | (1,823,210) |

Conclusion

11. Place2Be is well-respected organisation in child and adolescent mental health and the UK's leading provider of school based mental health services. Its work is grounded in evidence to enhance the wellbeing and prospects of children and their families by providing access to therapeutic and emotional support in schools and shows impressive results. Following support, 79% of children show improved wellbeing, 68% are less of a burden on their teacher, 65% found their difficulties had less impact on their learning and 73% show an improvement in friendships. The Grants Committee's support will ensure Place2Be are able to conduct this important longitudinal research study and share the learnings in the wider mental health space across London and beyond.

Appendix

- Appendix 1: Strategic Initiative Filters

Geraldine Page

Funding Director

E: geraldine.page@cityoflondon.gov.uk

Appendix 1 – Strategic Initiative Filters

| | |
|--|------------|
| FILTERS | |
| <i>Will The pro-active grant:</i> | |
| Further the Trust's Vision and Mission (a fairer London & tackling disadvantage)? | Y |
| Support work within one of existing Bridging Divides programmes (BD)? | Y |
| Or, meet a clear need that has arisen since (BD) were agreed? | |
| Have the potential for impact beyond that of an individual reactive grant or number of individual grants? | Y |
| Be affordable within the agreed annual budget (from the Trust alone or in combination with other funders) and, looking forward, leave sufficient budget to meet anticipated pro-active grants for the remainder of the financial year? | Y |
| Be made to an organisation(s) that conforms to the Trust's eligibility criteria and has the capacity and expertise to deliver the work? | Y |
| PRIORITISATION GUIDANCE | |
| Evidence | |
| Is there external and/or internal research and information that supports the need for the proposed grant? | Y |
| Is there external and/or internal research and information that indicates the approach proposed in the grant will be successful? | Y |
| Is there evidence that indicates the work will be hard to fund from other sources? | Y |
| Impact | |
| Will the grant tackle a root cause(s), or positively influence policy or practice? | Y |
| Will the work/approach funded be replicable? | N/A |
| Does the grant provide an opportunity to strengthen Civil Society in London? | Y |
| Is the work sustainable beyond the period of the grant? | Y |
| Can the impact of the work be measured through evaluation? | Y |

This page is intentionally left blank

| Committee | Date |
|---|---|
| Grants Committee of the Bridge House Estates Board Bridge House Estates Board | 20 June 2022 6 July 2022 |
| Subject: Alliance Partnerships – London Legal Support Trust (LLST), Advice Skills Development Fund (ASDF) Ref: 19437 | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support? | 1,3 |
| Which outcomes in CBT’s funding strategy, <i>Bridging Divides</i>, does this proposal aim to support? | Reducing inequalities, Progressive, Collaborative, |
| Does this proposal require extra revenue and/or capital spending? | No (£5m funding allocation from Bridging Divides designated grant making fund) |
| If so, how much? | N/A |
| What is the source of Funding? | Bridging Divides allocation 2022-23 |
| Has this Funding Source been agreed with the Chamberlain’s Department? | Yes |
| Report of: David Farnsworth, Managing Director of BHE | For Decision |
| Report Authors: Sam Grimmett Batt, Funding Director, Lydia Parr, Head of CAR, Sandra Jones, Funding Manager. | |

Summary

This report requests funding of £5m to be awarded to London Legal Support Trust (LLST) [charity no: 1101906] over five years towards onward grant making under the Advice Skills Development Fund (ASDF) (approximately £4.2m of the £5m), and towards the process of co-designing a funding programme, including overall administration costs of both activities (co-design and onward grant making) (approximately £800k of the £5m).

Following a period of significant under-investment in the advice sector, exacerbated by the Covid-19 pandemic and now cost-of-living crisis, the time has never been better to make a substantial contribution to not just the services which underpin the sector, but its underlying infrastructure too. This funding will increase access (and improve the quality of existing access) to advice services for Londoners seeking support for their housing, welfare benefits, employment, debt, family law and immigration needs. This will be achieved through work to both develop and improve recruitment, retention, training and qualifications, and leadership functions, and to develop new services which open up access to communities which previously faced barriers to access. Furthermore, this funding will complement other work that CBT is funding (in collaboration with others) to address related issues (e.g: legal aid invoicing) and to bridge the gap in investment and provision across smaller and larger services.

Approval of this funding also provides an opportunity to maximise leveraging potential, and support LLST to raise additional funds from other supporters. A payment schedule will be drawn up, allowing the funds to be paid to LLST in instalments and to be received prior to onward grants being committed/paid.

City Bridge Trust (CBT) has funded advice work for much of its history, with specific funding strands/priorities devoted to it during the current (Bridging Divides) and previous (Investing in Londoners) funding strategies. The development of the ASDF is timely, as it will shore up the sector at a time when demand is likely to skyrocket, due to the cost-of-living crisis. It will also continue to build CBT's legacy as a collaborative funder, both within this fund itself and by providing medium-long term support which is complementary to other major funding designed to address the cost-of-living crisis in the more immediate term.

This recommendation is the largest Alliance Partnership recommendation to date, primarily due to the work taking place over a longer period than previously funded Alliance Partnerships (five years). The "per annum" allocation is not dissimilar to previous awards.

Recommendations

The Grants Committee is recommended to:

- i) Endorse to the BHE Board a grant of £5m over five years, as an Alliance Partnership, to London Legal Support Trust [charity no: 1101906] for running costs and onward grant making as part of the Advice Skills Development Fund.

The BHE Board is recommended to:

- ii) Agree the grant of £5m over five years to London Legal Support Trust as per the terms recommended by the Grants Committee.

Main Report

Background

1. This report seeks support for a recommendation to partner again with an existing long term funder ally, LLST, as an Alliance Partnership.
2. CBT has engaged in collaborative funding practices for much of its 27-year history – particularly, but not limited to, its support of London's voluntary and community sector infrastructure. It has widely been agreed across the sector that collaborative funding approaches are required for a thriving civil society and should form a healthy part of the overall funding ecosystem.
3. At the Grants Committee meeting on 6th December 2021, the Committee agreed to earmark up to £15m toward a series of 'Alliance Partnerships' which would advance the mission and vision of the Bridging Divides Strategy (see appendix 2 for a summary of Alliance Partnerships awarded so far). It was agreed that Alliance Partnerships would be awarded to:

- a. Established funders, with a track record of delivering grant funding programmes, where the organisation's primary aim (or primary aim within civil society) is funding.
 - b. For grant programmes which are in development, or recently begun, and which have a finite end point; and for,
 - c. Initiatives which have involved significant scoping/evidence review work, where the funder has specialist knowledge of the funding theme/priority that is additional to CBT's own reach.
4. The proposal in this report meets the above criteria and, if approved, would see CBT strengthen its commitment to supporting Londoners most impacted by inequality and injustice through a partnership that will multiply the impact of the funding we have available.

London's advice sector

5. Advice in this context refers to legal advice given in the areas of law sometimes referred to as 'social welfare law'. This includes the law in relation to housing, welfare benefits, employment, debt, family law and immigration. Most advice service users would not necessarily identify their issue as having a legal component, and most people approach advice services with a particular problem which often covers several areas of social welfare law, e.g., someone presenting with a debt problem could lead to rent arrears and might also have an employment issue/ problem with Universal Credit.
6. Given that people experiencing problems in social welfare law are likely to have very low incomes and that there is very limited access to legal aid in all but a few areas (eviction for example), most of the advice in these areas is delivered by voluntary, third sector organisations or by civic services (such as Local Authority welfare rights advisers, although these are few and far between in London). Collectively, these organisations have been known as the 'advice sector'.
7. More recently the term 'access to justice sector' has been used to encompass voluntary advice services, legal pro bono services, and student law clinics. It is important that those seeking advice can access independent advice as many of the cases taken are critical of statutory services such as local authorities, immigration services, Department for Work and Pensions, health sector, and seek to overturn their decisions – difficult if the advice service is within the organisation where the decision is being challenged.
8. There is a range of agencies offering social welfare advice that make up the advice sector. There are some, such as law centres who employ lawyers, but most advice services are delivered by people who are not qualified lawyers, and as such fall outside of regulation. The exceptions to this are those employing lawyers working in a legal capacity, those giving immigration and asylum advice, which must register with the Office of the Immigration Services Commissioner (OISC) and those giving money advice or financial advice in relation to managing debts, which must be registered with the Financial Conduct Authority (FCA).

9. Three levels of advice are offered: information, generalist (with or without casework) and specialist. Information advice provides information only, such as leaflets or signposting. In broad terms, generalist advice services can identify legal issues and give clients the knowledge and guidance to resolve these and may take responsibility for moving the issue forward (case work); specialist advice organisations can undertake ongoing case work, as well as advocacy and representation. Specialist advice services may also indicate services delivering advice to a specified client group with a particular combination and/or complexity of legal needs (for example, women, disabled people, students, migrant communities etc).
10. There is no statutory basis for the provision of local advice centres apart from through the Care Act 2014 and Homeless Reduction Act 2017 where local authorities do have to provide access to advice for their local populations. These duties are discharged in different ways, although in London many local authorities choose to fund local advice providers to help meet these requirements. Some advice agencies who provide advice at Specialist Level are also in receipt of Legal Aid funding through the Legal Aid Agency for those areas of law that qualify.
11. The sector also distinguishes between services which are part of the 'formal' advice sector and those which fall outside this and are 'informal'. The distinction for the formal sector is those organisations who identify as providing an advice service, who seek and receive funding to provide this service, and who carry indemnity insurance as protection for clients against wrong advice. Many of these services will hold membership of one of the advice networks (Law Centres Network, Citizens Advice, AdviceUK etc) and may also hold recognised quality assurance standards (Lexcel, Specialist Quality Mark or Advice Quality Standard (AQS)). To be funded under CBT's Advice theme, organisations are expected to have a quality mark, usually AQS; we offer to fund organisations to get accreditation if we identify that their service meets our priorities but is lacking the qualification.
12. Those within the 'informal sector' will be providing advice as a small part of other services so therefore may not identify as an advice service. They may not seek or receive funding for this service or simply may be unaware of the activity falling within the definition of advice. They are less likely to hold a quality mark and may not hold indemnity insurance. Such services are frequently small, and community based. Many people delivering advice within both the formal and informal sectors are unpaid volunteers. Whilst there are many paid posts, the sector could not deliver the volume of advice without the support of the volunteers.
13. CBT has a long history of funding the advice sector to address inequalities in London by enabling more Londoners to access debt and legal advice services for support before they hit crisis point. Funding advice work complements most of CBT's other funding streams such as those addressing homelessness or working with disabled people, migrants, refugees, and asylum seekers. This funding covers both generalist and specialist advice levels, and CBT is one of the few funders in London that include generalist level advice.

14. Throughout the Investing in Londoners and Bridging Divides funding strategies, CBT has funded 141 advice organisations (some more than once), totalling some £22,000,000, predominantly covering various front-line services.
15. There have also been strategic grants such as projects partnering with the Legal Education Foundation (LEF) e.g., £500,000 towards an Immigration Advice grants programme (also supported by the Greater London Authority (GLA) and Trust for London) and, since 2016, supporting the provision of Justice First Fellowships (also supported by Esmee Fairbairn Foundation and Unbound Philanthropy) which encourages and enables newly qualified lawyers to practice in the social justice arena. CBT has also partnered with LLST by jointly funding its Centres of Excellence project (since 2014) working with smaller organisations to capacity build their specialist advice. CBT also funds a London-wide advice sector forum and a billing co-ordinator (a joint project with the LEF and LLST) to support agencies who get legal aid to bill the Legal Aid Agency properly and so make them more sustainable.
16. CBT has been a major player in the funding and development of the advice sector, identifying how best to support the sector, and partnering with other main advice funders such as LEF, LLST, GLA, Trust for London, National Lottery Community Foundation (NLCF), Paul Hamlyn Foundation, Henry Smith, and Justice Collaborations, to recognise issues and gaps within the sector, exploring how best to support and build its capacity and sustainability.
17. This collaborative working has strengthened over recent years, with our engagement in many of the advice networks and main agencies in London. These networks include the London Advice Alliance (recently facilitated by London Funders) and the Employment Legal Advice Network (a London hub for employment advisors run by Trust for London, Migrants Exchange and Justice Together (a national funders collaborative)). This work is facilitated by some of the main umbrella organisations working with the advice sector such as AdviceUK, Advice Services Alliance, Toynbee Hall, Rightsnet¹ and Law Centres Network.

LLST – background and recent funding history

18. LLST is a registered charity [charity no: 1101906] and independent funder that raises funds to distribute to and otherwise support free legal advice services in London and the South East. It uses this funding to support free legal advice centres across London and the South East, through the provision of grant funding, supporting infrastructure of the sector, and helping agencies reduce costs and save money via pro bono or discounted schemes.
19. It is part of a network of seven Legal Support Trusts across England and in Wales working with the Access to Justice Foundation to support pro bono and advice agencies, ensuring funds can be distributed where needed most throughout England and Wales.

¹ Formerly the London Advice Services Alliance (LASA).

20. In addition to fundraising and grant-giving, LLST is committed to supporting legal advice centres in being cost-efficient and sustainable. It offers Grants Plus support through money-saving schemes and running or funding places on training courses depending on agencies' needs, and offers advice, support, and guidance where possible.

21. LLST convenes the London Specialist Advice Forum (part funded by CBT) for its Centres of Excellence and other legal advice agencies in order to improve knowledge sharing in the sector, as well as providing peer support.

Current applications and previous Funding History

| Status | Grant information | Type |
|---------------------|--|-----------------------|
| Under assessment | Continuation of the "Centres of Excellence" programme at £362,363 for two further and final years (see 2019 grant below which is about to end). | Project |
| Active (2022) | £50,000 for the year towards the costs of a FTE Billing Co-ordinator and associated running costs as a partnership with LLST and LEF to build the capacity of legal organisations to bill the Legal Aid Agency correctly and become more sustainable | Strategic Initiatives |
| Active (2019 start) | £345,000 over five years to cover the cost of a f/t Development Officer plus senior officer support from the CEO and Head of Funding and associated project costs of establishing, developing and maintaining the London Specialist Advice Forum. | Project |
| Active (2019 start) | £464,000 over three years towards core salary and other costs to support the provision of Centres of Excellence in Greater London | Bridging Divides |
| Archived (2017) | £300,000 over two years towards core salary and other costs to support the provision of Centres of Excellence in Greater London. | Project |
| Archived (2014) | £450,000 over three years towards core salary and other costs to support the provision of Centres of Excellence in Greater London. | Strategic Initiatives |

The skills gap – background

22. In July 2020, the Advice Services Alliance (ASA) published findings² that indicated that even before the Covid-19 pandemic hit increasing numbers of people in London were seeking advice for welfare benefits, debt, immigration, and employment issues. Services were struggling to meet the demand. Drivers of increased demand include changes to disability benefits, the roll out of Universal Credit, the no recourse to public funds immigration policy, a shift to online processes for claiming benefits and Brexit. The situation has worsened due to the impact of Covid-19.

² [2020, Advice Services Alliance: Advising Londoners, an evaluation of the provision of social welfare advice across London.](#)

23. The provision of advice in London was found to fall short of the high level of demand with 75% of survey respondents informing of gaps or shortages in social welfare advice in their area. Young people and ethnic minority communities are least likely to easily access advice services although they are more likely to need them. People living in deprived areas of outer London boroughs were found to have greater need for advice yet less accessible services than those in inner London.
24. This has been largely because of the impact of the Legal Aid, Sentencing and Punishment of Offenders Act 2012 (LASPO)³ which has significantly affected the ability of advice organisations to be able to train staff and to retain and replace experienced practitioners.
25. The government did conduct a post-implementation review of LASPO, publishing its conclusions in 2019. The review acknowledged the principle that people should be able to access the justice system but concluded that due to the economic climate it would not be possible to reinstate any significant areas of previously funded legal aid. A small amount of funding was made available via a subsequent action plan for work which prevents people from requiring legal services in the first place, but this was extremely limited. LLST is not aware of any other central government plans or interventions currently to address the issues identified in the skills gap research.
26. Other drivers of the skills gap include:
- a. A lack of distinct qualifications for much advice work.
 - b. A need for clear, recognised, and accredited pathways for skills and career development.
 - c. A lack of consistency and structure in the training available.
 - d. Recruitment, retention, and leadership pipeline issues.
27. Specifically, there is a question of whether current training offers are meeting the inclusion and relevance needs of the diverse workforce that targeted and community-led organisations (such as BAME and disability focused organisations and groups) represent.
28. Whilst facing a backlog of clients, advice organisations were dealing with depleted funding and resources as well as switching services to remote delivery in response to Covid-19. One in seven advice services reported being told to expect future funding cuts from local authorities and 50% said they did not know what the future held.
29. Despite the many challenges, the advice sector continued to find innovative ways to deliver advice to those who needed it most, such as providing services in health settings, training community ‘intermediaries’ who encounter people with social welfare issues and harnessing pro bono legal support. However, this is not enough to plug the gaps left by funding cuts.

³ In April 2013, the Legal Aid, Sentencing and Punishment of Offenders Act 2012 (LASPO) came into effect and introduced funding cuts to legal aid, meaning fewer people can access legal advice. Despite a government review of the impact of LASPO in 2017, the Law Society concluded that it is having/has had the following enduring effects:

- o legal aid is no longer available for many who need it and those eligible for legal aid find it hard to access.
- o wide gaps in provision are not being addressed and LASPO has had a negative impact on the state and society.

30. Following publication of the ASA research, the London Funders Advice Network (which is convened by the Association of Charitable Foundations), a group of London's primary advice funders, including Trust for London, CBT, NLCF, LLST and the GLA), set up a task-and-finish group to discuss the workforce crisis in the advice sector in London. The task group was joined by Law Centres Network, AdviceUK, ASA, Refugee Action, some service delivery organisations like Toynbee Hall and University House Legal Advice, and more funders, including Legal Education Foundation and Paul Hamlyn Foundation.
31. This led to a piece of research being commissioned in September 2021 by the group, funded by Trust for London and Paul Hamlyn Foundation. The research was undertaken by academics Dr Anne Rathbone (Centre of Resilience for Social Justice, University of Brighton), Mark Foster (former advice worker, and former Director of Advice, Wellbeing and Assessment at the Cardinal Hume Centre⁴) and Patrick Nyikavaranda (PhD student Brighton and Sussex Medical School).
32. The final report (see appendix 1) for this research was launched on 25th May 2022, but this proposal has been developed following the earlier release of an interim report to the commissioning group. The report (referred to henceforth in this report as "the Skills Gap research") consolidates the Advising Londoners research findings and makes recommendations for funders to collaborate with the sector to find co-produced solutions to respond to the current skills gaps crisis.
33. This proposal seeks approval to fund LLST, the primary/expert funder in the legal advice field, to take this partnership work to the next level, where co-produced solutions are developed, funded, and implemented based on the Skills Gaps research findings.

The Advice Skills Development Fund (ASDF)

34. As a response to the skills gap research, LLST has developed an action plan. Utilising the original task and finish group as a steering group, the research recommendations will be reviewed; co-producing potential solutions based on case studies identified in the research (see appendix 3) and designing a funding programme which can be used to award grants for work to advance those solutions. The funding programme is provisionally known as the Advice Skills Development Fund. LLST hopes to distribute the onward grants through the collaborative funder initiative Collaborative Action for Recovery⁵ (CAR), convened by London Funders. However, should the CAR not prove suitable, LLST would deliver the programme as a stand-alone or hybrid initiative.
35. The group will design a commissioning process for the funding; assess and make recommendations on the funding applications, and oversee the delivery, monitoring, and evaluation of the funded programmes (including commissioning a monitoring and evaluation partner). A wide range of stakeholders will be engaged in the programme design (in addition to the steering group) including small community-based and specialist organisations.

⁴ The Cardinal Hume Centre [Charity Commission Registration no: 1090836] is a leading London civil society community anchor organisation, supporting families and young people facing poverty and homelessness by helping them to thrive.

⁵ [2021.11 - Collaborative Action for Recovery proposal 0.pdf \(londonfunders.org.uk\)](#)

36. Currently the timeline (other than that the work will take place over five years), number and length of grants is unknown, as this will all depend on the work of the steering group to co-design the process and the total amount of funds that are raised. Officers will work with LLST to ensure that a robust plan is in place, including sitting on the steering group. The Grants Committee and BHE Board support at this early stage is requested to maximise leveraging potential with other funders, and to allow LLST to be able to formulate plan as and when the CAR collaboration develops.

ASDF - budget and fundraising

37. LLST has provided an indicative budget, broken down over five years, based on funds raised to date. This includes costs that would be incurred to deliver £5.2m of onward grants (see table below), plus a substantial increase in onward grants too, beyond the £5.2m planned for currently, should further funds for onward granting be raised (providing the same systems and processes are used to deliver all of the funding). Based on current ongoing discussions with other funders, it is likely that significant further funds will be raised towards the running costs and should this be the case LLST will vire any unspent running costs funds from the proposed grant to onward grant making. The table below shows total expected running costs (which include all developmental costs, and learning/evaluation costs) (including those that will be covered by other funders). Some of these costs are fixed costs such that the overall percentage of running costs is likely to reduce if other funders come on board.

| Total running costs over five years | |
|--|-------------------|
| Salaries - Senior Development Manager FT, CEO 2 dpw, Comms & Marketing Manager 1 dpw (inc. on-costs, increase, pension etc). | £535,649 |
| Project costs - commissioning expert advice, commissioning research, evaluation, events, contribution to core costs (rent, utilities etc). | £816,965 |
| Total running costs | £1,352,614 |

38. Should this proposal be agreed, officers will liaise with LLST once the programme specifics are more certain, (particularly the timeline for awarding onward grants) and a payment schedule will be drawn up accordingly. Payments will be made by CBT to align with planned expenditure (both administration/running costs and payment of onward grants).

39. It is CBT's standard practice to take a flexible approach and to amend payment schedules in line with programmatic expenditure as and when developments occur, however every effort will be made to establish an indicative annual breakdown as quickly as possible to inform cash-flow and investment drawdowns.

40. The running costs reflect expenditure of a nature that CBT regularly supports in its usual project work (predominantly salaries of relevant staff and costs of co-designing the funding framework). It is likely that the award of this grant will trigger further commitments from other funders so the full allocation towards running costs

may not be utilised (in which case any remaining funds will be used for onward grant making).

41. The Grants Committee are asked to consider an award which is significantly higher than the other funds currently awarded/under consideration for this work. This moment in time, as the country and the capital enter an unprecedented cost-of-living crisis, represents a key opportunity to create impact and demonstrate leadership within a sector which is critical to the futures of London's communities most impacted by injustice and inequality. Over the last 25 years, CBT has played a crucial role in the advice sector, as one of its most significant contributors, champions, and supporters. This award, as a percentage of the overall £15m allocated to Alliance Partnership expenditure, and as a percentage of the wider uplift in expenditure, is commensurate with our commitment to the sector to date, and with our ambitions to be a funder which catalyses change and improvement at a significant level. For Alliance Partnerships it has been our practice thus far to contribute the largest sum in each collaboration (in most cases by a considerable margin) due to the aims of the programme to utilise uplift funds in a way which maximises impact. However, the table below should also be viewed in the context that this award will be one of the earliest made and that the final breakdown will likely result in a smaller percentage being ultimately contributed by CBT.

| Budget and fundraising over five years | | | | |
|---|----------------------|---------------------------|-------------------|--|
| | Running costs | Onward Grantmaking | Total | Notes |
| CBT | £812,117 | £4,187,883 | £5,000,000 | Unconfirmed. |
| National Lottery | £540,497 | £0 | £540,497 | Unconfirmed. Amount indicative, may increase. |
| Trust for London | £0 | £500,000 | £500,000 | Confirmed. |
| Greater London Authority | £0 | £80,000 | £80,000 | Confirmed. |
| Paul Hamlyn Foundation | £0 | £0 | £0 | Unconfirmed, amounts for running costs vs onward grantmaking tbc. |
| Private law firms | £0 | £500,000 | £500,000 | Confirmed, but amount indicative (depends on apprenticeship placements). |
| AB Charitable Trust | £0 | £0 | £0 | Unconfirmed, discussions underway. |
| Total (to date) | £1,352,614 | £5,267,883 | £6,620,497 | |

Financial information

42. Note the table below does not include the receipt of the funding proposed in this paper. Reserves were held above target level in 2020 and 2021. Income and expenditure trends are largely stable, however there is a significant increase in income in 2022 primarily due to a new grant towards funding responses directly related to the cost-of-living crisis from a major funding partner. Although this represents a sharp increase in income, most of the increase will be distributed as onward grants. Based on the 2022 budget and LLST's predictions for future income, the total proposed Alliance Partnership award, per annum, is unlikely to amount to more than 50% of LLST's income in any of the years of the award. The

running costs/administration element of the award alone will not exceed 50% of income in any of the years of the award. If the total amount were to exceed 50% of annual funding, officers are satisfied that the importance of this strategic funding to London's advice sector (and its one-off nature) warrants an exception to the policy. An increase in staffing has been factored into the administration budget to allow LLST to expand to accommodate the additional activity this grant will enable.

| Year end as at 31 December | 2020 | 2021 | 2022 |
|-----------------------------------|-----------------|----------------|----------------|
| | Signed Accounts | Draft Accounts | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 1,341,310 | 1,270,071 | 2,300,934 |
| Expenditure | (1,287,562) | (1,207,993) | (2,300,200) |
| Surplus/(deficit) | 53,748 | 62,078 | 734 |
| Reserves: | | | |
| Total restricted | 79,877 | 79,877 | 167,302 |
| Total unrestricted | 288,257 | 350,335 | 263,644 |
| Total reserves | 368,134 | 430,212 | 430,946 |
| Of which: free unrestricted | 288,257 | 350,335 | 263,644 |
| Reserves policy target | 172,954 | 172,954 | 172,954 |
| Free reserves over/(under) target | 115,303 | 177,381 | 90,690 |

Conclusion

43. CBT's collaborations and Alliance Partnerships achieve more than the sum of their parts (or aim to) as, amongst other things, they provide opportunities for greater expertise to be harnessed and for learning to be shared. CBT is known as a funder which builds relationships with advice organisations and accommodates a focus on life change for clients (e.g. meaningful outcomes for individuals), rather than solely outputs (e.g. number of people seen, regardless of whether they saw any meaningful action/change as a result), and it was noted in the report that many of those interviewed regarded CBT and Trust for London as leading funders in the field for this reason.
44. Supporting this proposal with a grant to LLST of £5m will not only provide leveraging potential but will cement CBT's reputation as a driver of and for improvement in the sector. In the Skills Gap research, several consultees highlighted the need for funding of more strategic work that could address development needs *across the whole sector* (rather than in silo) and to improve the sector's ability to lobby for its aims – this initiative kick starts that process.
45. The funds will enable an increase in volunteering, apprenticeships, and work experience (especially paid opportunities, which were noted in the Skills Gap report as being required to promote equity of access). This will grow recruitment, alongside an increase in entry solutions. The ASDF will enable a bridge between smaller and larger advice agencies. It will mobilise the existing skilled workforce to benefit from grassroots community recruitment, without establishing a system that simply relies on communities as feeders but then drains smaller organisations of their staff once upskilled by them.
46. This funding will create provision for focused initiatives that bring together legal practitioners and those providing advice who do not have legal qualifications to generate solutions together based on mutual respect and links. It will support the

testing of new training and accreditation pathways, contributing to the sector in a way which complements CBT's historical and current support of London's legal advice system, including work to address issues with invoicing for legal aid, and work to continue the Centres of Excellence and Justice First Fellowships.

Appendices

- Appendix 1: "Mind the Gap" research
- Appendix 2: Summary of Alliance Partnerships awarded to date
- Appendix 3: examples of case study recommendations
- Full proposal available on request.

Sam Grimmitt Batt

Funding Director

E: sam.grimmitt-batt@cityoflondon.gov.uk

Appendix 1 – “Mind the Gap” research (the Skills Gap research).

[Addressing the Skills Gap within Advice Services, Rathbone, Foster & Nyikavaranda, 2022](#)

Appendix 2: Summary of Alliance Partnerships awarded to date

| Name of recipient | Programme | Amount |
|---|--|-------------------|
| Rosa [charity no: 1124856] | Rise Programme focused on womens' organisations led by Black and minoritised ethnicity people. | £499,999 |
| Greater London Authority | Civil Society Roots 3, focused on equity organisations in specific boroughs with low prevalence of such organisations. | £720,000 |
| John Lyons Charity [charity no: 237725] | To strengthen young people's organisations. | £1,020,000 |
| United Saint Saviours [charity no: 1103731] | To strengthen voluntary organisations in Southwark. | £500,000 |
| Trust for London [charity no: 205629] | Racial Justice Fund (specifically focused on economic equity) (£2,000,000) Disability Justice Fund (focused on capacity building for disabled people's organisations) (£1,500,000). | £3,500,000 |
| Total | | £6,239,999 |

Appendix 3: examples of case study recommendations

| |
|---|
| For recruitment and entry |
| “Grow your own advice staff” but at the community level rather than the big organisation level. |
| Addressing barriers to moving beyond entry level. |
| Aligning motivations for getting into the sector with better skills and opportunities to develop skills. |
| Investment in structured pathways in the areas of advice work that are currently lacking this. |
| For retention |
| Improving/standardising salaries, and other employment terms and conditions. |
| Introduction of CPD and NVQ pathways. Strategic improvement in supervision that takes place across the sector. |
| Development of an apprenticeship scheme (potentially hosted by Law Centres) including AdviceUK, legal advice providers and the ASA. |
| Develop provision in DDPOs and support for them to become AQS qualified if relevant, maximising the contribution of DDPOs in meeting client need. |
| An initiative to develop skills pathways in housing, welfare rights and employment advice. |
| For leadership |
| Projects which bring together legal practitioners and community based or more generalist advice practitioners to co-produce solutions to leadership challenges. |
| Training for management committee and board members on the importance of developing staff to become future leaders. |
| Contracts and grant assessment to include requiring orgs to show how they are promoting good leadership in their work. |

This page is intentionally left blank

| | |
|---|--|
| Committee | Date |
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: Cornerstone Fund Round 2 | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support? | 1 & 3 |
| Which Bridging Divides Funding Strategy priority does proposal aim to support? | 1, 2 & 5 |
| Does this proposal require extra revenue and/or capital spending? | No (funding allocated from BD designated grant fund) |
| Report of: David Farnsworth, Managing Director of BHE | For Information |

Summary

The Cornerstone Fund was originally approved in October 2016 with an additional allocation of £3million to assist in the strategic development of infrastructure support for London’s civil society. Round 1 of this Fund was launched in April 2018, as part of the overall Bridging Divides funding strategy, with Round 2 being launched in April 2021. The Cornerstone Fund is a collaborative initiative, bringing together funders and civil society support organisations and their partners, with the aim of enabling the systemic change needed for a thriving civil society, with a focus on tackling structural inequalities. The purpose of this report is to introduce the five applications presented for decision today.

Recommendations

The Grants Committee is recommended to:

- i) Receive this report and note its contents.

Main Report

Background to Cornerstone Fund

1. The criteria of the Cornerstone Fund were co-designed by a cross-sectoral group working in partnership with City Bridge Trust (CBT) which became the funder collaboration comprising Trust for London, the National Lottery Community Fund, the GLA, John Lyons Charity and London Funders. A total of 10 partnerships were supported during the first Round. Collaborate CIC was appointed as Learning Partner to work alongside CBT and a summary of their end of Year 2 report can be found [here](#).

Cornerstone Fund Round 2

2. The second Round was launched in April 2021. Trust for London has awarded CBT a grant of £500,000 over 3 years towards this. As with Round 1, there was a two-stage application process, with the successful Stage 1 applicants being awarded a development grant of up to £25,000 in order to work up their Stage 2 proposals. Originally, 13 partnerships submitted successful Stage 1 bids although one of these

has since had to withdraw from the programme due to unforeseen circumstances. Of the remaining 12, four Stage 2 bids were approved at the Grants Committee March 2022 meeting, five are included in today's papers, one is for decision by Delegated Authority and two are under consideration for funding directly from the National Lottery Community Fund (also due for decision this month).

3. Collaborate CIC successfully tendered to deliver the learning brief for this second Round and two learning workshops have already taken place with the lead partner organisations, funders and other in-kind contributors to the Cornerstone Fund such as London Funders and London Plus. It is testimony to the success of the Cornerstone Fund that lead partners have been willing to fully participate in the workshops before the outcome of their second stage application is known.

Conclusion

4. At the time of its launch in 2018, the Cornerstone Fund was breaking new ground in approaches to collaborative ways of working and the relationship between funders and grantees. Learning from Round 1 helped influence the approach of the London Community Response to the Covid pandemic, although the response was on a much larger scale, of course.

David Farnsworth

Managing Director of Bridge House Estates

E: David.farnsworth@cityoflondon.gov.uk

Jenny Field

Consultant

jenny.field@cityoflondon.gov.uk

MEETING 20/06/2022

Ref: 19238

ASSESSMENT CATEGORY: Bridging Divides – Cornerstone Fund

London Youth

Adv: Caspar Cech-Lucas

Amount requested: £300,000

Base: Hackney

Benefit: Croydon

Amount recommended: £300,000

The Lead Organisation

London Youth (also known as The Federation of London Youth Clubs / LY) is a registered charity and leads the largest, longest-running youth sector network in the capital. Across its network of 637 youth organisations, 5,724 youth workers support 87,646 young people every week. London Youth is committed to strengthening London's youth organisations through strategic leadership, personalised support, training, delivering a quality mark scheme for youth work, and securing grants and programme funding for members.

The Partnership

The Partnership involves three core organisations: London Youth, Power the Fight, and the Brandon Centre, all of whom bring complementary skills, insight and experience on youth work, mental health, cultural sensitivity, and therapeutic interventions. London Youth and Power the Fight have worked together for around 18 months on a project funded by the Violence Reduction Unit. Power the Fight supported London Youth to scrutinise and build its cultural competencies. The Brandon Centre brings therapeutic expertise along with a willingness and appetite to address systemic racism within the mental health sector. If successful in securing a grant the aim is to engage at least 8 Croydon based youth organisations, three of whom have already been involved in the development stage (PlayPlace, Legacy Youth Zone, Gloves not Gunz). Croydon Council is keen to contribute and has offered in kind support with training and mapping of existing services. Alongside this, a range of therapeutic/mental health focused organisations and individual professionals will be drawn in to develop the model and deliver training. London Youth has experience in convening and facilitating projects of this size and scope. The partnership is mindful of the need to strike a balance between driving delivery and allowing for flexibility and meeting the needs of the youth sector and youth workers.

The Proposal

This is a coherent and well thought through proposal to develop a place-based model to build the capacity of the youth sector to support the mental health needs of young people in Croydon. This pilot scheme will create cross sector partnerships and build a community of practice to upskill youth workers on mental health support

through training and clinical supervision. Alongside this, therapeutic professionals will also receive training and support to build cultural competency to improve their own practice and work towards breaking down structural discrimination within the sector. London Youth has worked closely with Power the Fight in the development phase to identify key partners, run consultations with youth workers, training providers, NHS representatives, young people, and black led community groups.

The partnership has been careful to identify local needs, secure local support and to ensure the project is complementary to other work already underway. Many youth workers are having to triage and help young people navigate mental health challenges. There is widespread acknowledgement that community based mental health interventions and preventative work is crucial. Rather than turning youth workers and grassroots organisations into mental health practitioners, this is about equipping staff with the necessary skills and clinical support. Careful consideration has been given to safeguarding. With the systemic issues around lack of access and diversity within the mental health sector, youth workers are in prime position to be part of the solution, especially for young people of colour, given the demographics of London. At the end of the two years, it is hoped that the project will have piloted a model to:

- Enable youth workers to support young people with their mental health
- Establish local collaboration between the youth and therapeutic sectors
- Identify ways to ensure counselling and clinical mental health support can be more accessible for marginalised and minoritized communities.

Cornerstone Fund Outcomes

This proposal addresses 3 of the main Cornerstone Fund outcomes, under the headings of 'capacity and capability' (through ensuring youth workers, the youth sector and therapeutic professionals are better placed to support young people and make appropriate referrals); 'co-production' (by working with young people, youth workers and therapeutic professionals to design and deliver solutions); and 'collaboration' (by ensuring better working relationships and respect between the youth and therapeutic sectors).

Equity Considerations

The project was developed with the voices of the communities it is hoping to impact at its core, including young people with lived experience of mental health challenges, black youth sector CEOs with lived experience, and youth workers who live in and represent excluded and discriminated communities. Equity considerations are essential for the systems change that this partnership is hoping to enact.

Financial Information

LY's 2021 accounts show a deficit, with the forecast for the two years following expected to show further deficits. The 2021 deficit is against restricted funds, but deficits are expected against both restricted and unrestricted lines in 2022 and 2023

(with 2023 showing a reduced overall deficit). LY's Free unrestricted reserves stood at £3.3m in 2021, which is above the organisation's reserves target of 3-6 months of total expenditure, although the organisation aims to hold 6 months by 2025 (estimated to be £4m). This 6-month reserves target is ambitious, and although the organisation's reserves are declining within the table below, they remain above 3 months of expenditure (3.9 months in 2023). This steady decline of free reserves is discussed in the organisation's 2021 accounts, but as noted the reserves remain above target levels. In addition, of total designated funds of just over £11m, £4.3m is designated towards a 'development fund' which is being held for the long term in investments. These funds are designated for the longer-term sustainability of the charity, giving assurances that the organisation has a longer-term financial strategy in place. There has been investment in fundraising, specifically corporate and high net worth individual, to further diversify income streams to complement LY's strong trust and foundations track record, all of which will support the organisation in its longer-term financial sustainability and mitigate the identified decline in free reserves. The organisation is confident it can remain a going concern.

| Year end as at 31st August | 2021 | 2022 | 2023 |
|-----------------------------------|-------------------|-------------------|-------------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 5,341,742 | 6,448,387 | 7,268,837 |
| Expenditure | (6,625,326) | (7,403,453) | (7,719,787) |
| Gains/(losses) | 1,053,573 | 0 | 0 |
| Surplus/(deficit) | (230,011) | (955,066) | (450,950) |
| Reserves: | | | |
| Total endowed | 1,634,806 | 1,634,806 | 1,634,806 |
| Total restricted | 652,741 | 227,035 | 15,417 |
| Total unrestricted | 14,545,442 | 14,016,082 | 13,776,750 |
| Total reserves | 16,832,989 | 15,877,923 | 15,426,973 |
| Of which: free unrestricted | 3,300,787 | 2,771,427 | 2,532,095 |
| Reserves policy target | 1,656,332 | 1,850,863 | 1,929,947 |
| Free reserves over/(under) target | 1,644,456 | 920,564 | 602,148 |

Recommendation

This is a strong and well-developed partnership to pilot a potentially game-changing place-based model to build the capacity of the youth sector and therapeutic professionals to support young people's mental health needs in Croydon. Funding at the level requested is recommended:

£300,000 over two years (£138,000; £162,000) to pilot a place-based model to build the capacity of the youth sector to support young people's mental health needs in Croydon.

This page is intentionally left blank

MEETING 20/06/2022

Ref: 19150

ASSESSMENT CATEGORY: Bridging Divides – Cornerstone Fund

The Bridge Renewal Trust

Adv: Caspar Cech-Lucas

Amount requested: £300,000

Base: Haringey

Amount recommended: £300,000

**Benefit: Haringey, Harrow,
Kensington and Chelsea, Merton**

The Lead Organisation

The Bridge Renewal Trust (TBRT) is a registered charity established in 2009. It has over a decade of experience of providing a range of vital front-line support and specialist support and services aimed at improving health and wellbeing, supporting education and employment, relieving, and preventing poverty, and improving the life-chances and quality of life of local residents. TBRT is the Strategic Partner for Haringey Council and provides a range of support for the community, voluntary and social enterprise sector. It delivers this work through building capacity, developing the sector, enabling the local groups to access funding individually and through collaboration and consortia. TBRT is also host to Haringey Giving, established in 2019 as an independent, resident led partnership and local Place Based Giving Scheme.

The Partnership

The core partners of the Givings Together collaboration at Stage 1 included six Place Based Giving Schemes (PBGS) comprising a mix of well-established and smaller and emerging PBGS in Barking & Dagenham, Camden, Haringey, Harrow, Kensington & Chelsea, and Merton. In the six-month development phase this new partnership has built trust amongst the partners, developed relationships, and agreed a set of principles and objectives to guide future work. The partnership involves community partners to ensure representation from communities (within each borough) which experience structural discrimination in accessing funding. These new partners will join the Givings Together partnership to develop representation in their governance and decision making. These new partners include Naz & Matt Foundation, Sister System, Youth Action Alliance, Merton Centre for Independent Living, Harrow Association of Somali, Voluntary Organisations Ltd and Make Your Mark B&D. Both Camden and Barking and Dagenham have decided to step back from the partnership ahead of the second stage. CBT's officer assessment is that the remaining partners are strong enough to take the project forward and share an appetite for a test and learn approach as they are at similar stages of the participatory grant making journey.

The Proposal

The focus of this collaboration is to build the capacity of Place Based Giving Schemes to develop and apply Participatory Grant Making (PGM) models in a local context. The partnership commissioned a research report mapping PGM approaches, focusing on London but also drawing in examples from other areas. The report, due to be published later in the year, highlights the need for capacity building and infrastructure development, creating spaces for formal and informal peer learning, and ensuring diversity is considered an asset in PGM. The findings have helped to inform the Stage 2 application. With many funders curious, yet cautious about participatory models, the Givings Together partners hope to strengthen their community of practice. They will generate evidence and resources to build knowledge and tools that can be applied and adapted by those wanting to develop their own PGM models within PBGS. The community of practice and work to date has already triggered interest and discussions about PGM models within the London Givings Network. The ambition is that the partnership will help to generate a transformative shift in practice and power so that structural discrimination in grant making is addressed through communities having a greater role in how funding decisions are made, and money is spent.

Givings Together is mindful of the fact that a 'one size fits all' approach to PGM will not work for every community or PBGS. It is committed to flexibility, a test and learn approach and piloting PGM approaches co-created with community groups. From this it will collate learning and insight and develop a hub of good practice to build on what currently exists and share insights from Givings Together and other sources. The application outlines a clear set of objectives. The Risk Register submitted with the application outlines plans to create a detailed delivery plan within the first three months of a grant. The partnership will recruit a Coordinator and appoint an independent evaluator.

Cornerstone Fund Outcomes

This proposal addresses the five main Cornerstone Fund outcomes under the headings of 'Capacity and Capability' (by developing capacity within PBGS to deliver a range of PGM models); 'Co-production' (through the involvement of communities impacted by structural discrimination in the partnership and community of practice to lead the programme); 'Data and intelligence' (through harnessing knowledge and experience of communities on the effectiveness and impact of PGM; and to continue to gather learning and data about PGM within PGBS; and sharing this online through the resource hub); 'Voice and influence' (through partnership and leadership from representatives from specialist community organisations); 'Collaboration' (by networking within and across sectors and building a community of practice amongst London PBGS).

Equity Considerations

By including the voices of community partners who have experienced discrimination in the pursuit of funding within the design of the programme, Givings Together has

considered equity in all decisions made in relation to the partnership. At Stage 1, 50% of the Project Board were community leaders who have experienced structural discrimination, and the goal will be for this to be a minimum of 75% during Stage 2.

Financial Information

TBRT is located within a community centre which contains the Laurels Healthy Living Centre which generates rental income. Other funding sources include earned income from sales, service contracts from commissioners, and grants from charitable funders and the Local Authority, representing diverse income streams. £3.4m was held in unrestricted funds at the end of 2021, but just over £3.0m of this was designated against the net book value of fixed assets and programme relates investments. The applicant's reserves target is to hold 6 months of unrestricted expenditure in free unrestricted reserves. In the organisation's 2021 accounts £320k of free unrestricted reserves were held, representing 2.9 months of unrestricted expenditure. There is a strategy in place to build reserves, which includes planned discussions to negotiate a lower energy supplier bill considering the cost-of-living crisis. Although the reserves target is not met in the table below, the charity seems stable due to reserves building year on year, consistent surpluses, and a high percentage of confirmed income each year (with 92% of income confirmed in 2023), communicating confidence in financial management.

| Year end as at | 2021 | 2022 | 2023 |
|-----------------------------------|------------------|------------------|------------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 2,244,212 | 2,854,731 | 2,644,996 |
| Expenditure | (2,106,114) | (2,454,846) | (2,600,147) |
| Gains/(losses) | 9,549 | 0 | 0 |
| Surplus/(deficit) | 147,647 | 399,885 | 44,849 |
| Reserves: | | | |
| Total restricted | 120,681 | 215,038 | 226,088 |
| Total unrestricted | 3,375,306 | 3,680,834 | 3,714,633 |
| Total reserves | 3,495,987 | 3,895,872 | 3,940,721 |
| Of which: free unrestricted | 320,348 | 625,876 | 659,675 |
| Reserves policy target | 656,449 | 1,107,381 | 1,024,494 |
| Free reserves over/(under) target | (336,101) | (481,505) | (364,819) |

Recommendation

This is a strong proposal to build the capacity of Place Based Giving Schemes to develop and apply Participatory Grant Making models in a local context and to address structural discrimination in grant giving through shifting power in decision making. Funding at the level requested is recommended:

£300,000 over three years (£100,000 x 3) towards a project to build the capacity of Place Based Giving Schemes in London to develop and apply Participatory Grant Making models in a local context.

This page is intentionally left blank

MEETING 20/06/22

Ref: 19267

ASSESSMENT CATEGORY: Cornerstone Fund Round 2

Africa Advocacy Foundation

Adv: Julia Mirkin/Jenny Field

Amount requested: £246,242

Base: Lewisham

{Revised request: {£275,000}}

Benefit: London-wide

Amount recommended: £275,000

The Lead Organisation

Africa Advocacy Foundation (AAF) is a community-led organisation that was registered as a charity in 1996. It supports and empowers migrant communities experiencing disadvantage through a range of targeted programmes addressing issues such as: violence against women and girls; support for people with HIV; awareness raising of HIV prevention; development and roll-out of digital health support packages; young people's programmes and the development of co-produced HIV care with Black African patients. AAF has a track record of successful partnership working, seen recently in its role as Comic Relief's intermediary grant distributor, supporting grant-making through the Global Majority Fund.

AAF is a member of The One Voice Network (OVN), an independent collective of 10 Black-led community organisations that work together to improve the health of Black people living with HIV in the UK. This application has been submitted by AAF on behalf of the OVN to support the Unheard Voices initiative, that will be delivered in collaboration with the National AIDS Trust (NAT). Although AAF will be legally responsible for any funding awarded, leadership of Unheard Voices will be steered by a Community Advisory Board. AAF recognises its role in enabling this community-led delivery model and ensuring Unheard Voices builds capacity in OVN members.

The Partnership

The OVN brings lived experience of inequality in healthcare to this partnership, which is experienced by those OVN represents - through stigma within primary care settings, exclusion from research, and limited access to information and treatments.

The National Aids Trust (NAT) describes itself as the UK's HIV rights charity. It aims to stop HIV being a barrier to health, dignity, and equality. It also aims to stop HIV transmission by increasing public awareness about prevention, and by promoting testing and early diagnosis.

NAT is recognised for its achievements in challenging the criminalisation of HIV. For example, its work helped stop the prejudicial use of HIV status data in immigration tracing. This led to HIV services being free, regardless of immigration status and HIV guidance is now available in immigration removal centres because of NAT's campaigning. NAT has had a strong influence on HIV policy, expertise that strongly supports the Unheard Voices partnership, for example, it was a lead partner of the HIV Commission, convened to end new cases of HIV in England by 2030. Through this partnership with OVN, NAT hopes to extend the reach of its community engagement, ensuring its policy work is informed by a diversity of voices.

The Proposal

Unheard Voices will tackle three systemic issues affecting engagement with HIV services by Black people. The first issue is unequal representation of Black people

and their experiences in the planning and delivery of HIV services. To address this, Unheard Voices will recruit and train a panel of six community members from its networks and support them to engage meaningfully with the co-production of HIV programmes, alongside research institutions and other relevant stakeholders. It is hoped that this will generate more representative research, evidence of need and experiential insights, all of which can improve the experiences and increase engagement of black people with HIV services and treatment.

The second systemic issue is how HIV services are commissioned by Local Authority Public Health Commissioners. Unheard Voices will work to make commissioning practices more inclusive, evidence-based, and equitable by submitting Freedom of Information requests to access information about commissioning practices. OVN and NAT will collaborate to recommend how commissioning practices could adapt to meet local needs more effectively by drawing on local HIV data. Recommendations will be shared with Commissioners in each borough along with a request to meet in person. Unheard Voices hopes to open new lines of communication with Directors of Public Health through this workstream.

The third systemic issue addressed by Unheard Voices is the accessibility and value of primary care for Black people seeking HIV treatment and support. Unheard Voices will survey OVN community members about their experiences engaging with primary care providers. Focus groups for specific segments of OVN's community, such as LGBT, youth, older people, and women, will draw out further evidence to share with Primary Care Networks and the Royal College of GPs about the needs of Black communities. The data collected will also be disseminated at meetings and conferences to advocate for greater patient and community engagement and increased HIV knowledge within primary care providers.

To achieve the above, a programme of training will be delivered to ensure that community organisations and individual advocates have the capacity to engage with the three workstreams. The training will involve providing information and statistics to equip advocates to make the case for change. It will include an introduction to the professional culture of the NHS, and it will offer advanced communication and facilitation skills training.

Following discussion at the assessment meeting, the project team was invited to review the evaluation plans presented for Unheard Voices. It was the view of CBT officers that the legacy of Unheard Voices could be enhanced by investing more in the project's evaluation to support greater understanding of what aspects of the project's design are most effective. A revised project budget was submitted, including modest budget increases for research, learning and communications activities. The most significant change, however, is in the budget line for evaluation, which has increased from £4.4K to £15K. To support the management of this expanded evaluation proposal, AAF has also increased its management and admin costs by just under £15K. The total request has increased by £28,758.

Cornerstone Fund Outcomes

This proposal meets all the long-term outcomes outlined in the Cornerstone Outcomes framework, namely, building capacity and capability; drawing on co-production; improved gathering and use of data and intelligence; enabling voice and influence and involving partners in collaborative working practices.

Equity Considerations

All 15 of the organisations in the One Voice Network are Black led, and member organisations have lived experience of HIV at governance and staff level. The One Voice Network organisations are firmly rooted in their communities and have extensive knowledge of the issues and needs of different segments of the Black community, who are living with, or at risk of, HIV.

Drawing on the reach of OVN's network, Unheard Voices will engage people from Black communities in the review of existing healthcare, commissioning, and primary care practices, bringing policy and practice closer to people directly effected by their design and delivery. This aspect of Unheard Voices directly addresses the well-documented health inequalities experienced by racialised communities with HIV.

By building individual capacity-building into the project's design, Unheard Voices is adopting an equitable and enabling approach, ensuring that the voices of historically disadvantaged groups can be heard and can actively shape service redesign.

Unheard Voices will be overseen by a Community Advisory Board, ensuring that underrepresented and disadvantaged people who are most affected by inequality in healthcare are steering the development of this project and ensuring it continues to meet their needs.

Financial Information

AAF's increasing turnover is attributed to a growth in the demand for its services, caused by the impact of the Pandemic. AAF has successfully fundraised, allowing it to meet this demand. Income during 21-22 also includes £288,000 that AAF distributed on behalf of Comic Relief as part of the Global Majority Fund.

AAF's unrestricted free reserves are above its reserves policy target. Trustees are considering increasing the reserves policy target to between four and six months of expenditure to provide a larger financial cushion as the organisation's turnover increases.

| Year end as at 31 March | 2021 | 2022 | 2023 |
|-----------------------------------|-----------------|---------------------|------------------|
| | Signed Accounts | Management Accounts | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 1,020,155 | 1,207,230 | 1,477,127 |
| Expenditure | (778,636) | (1,117,447) | (1,386,950) |
| Surplus/(deficit) | 241,519 | 89,783 | 90,177 |
| Reserves: | | | |
| Total restricted | 312,017 | 324,986 | 355,374 |
| Total unrestricted | 609,987 | 686,801 | 746,590 |
| Total reserves | 922,004 | 1,011,787 | 1,101,964 |
| Of which: free unrestricted | 273,263 | 350,077 | 409,866 |
| Reserves policy target | 194,659 | 279,362 | 346,738 |
| Free reserves over/(under) target | 78,604 | 70,715 | 63,129 |

The Recommendation

£275,000 over two years (£130,733; £144,267) towards the salary costs of staff within the One Voice Network and National Aids Trust involved in delivering the Unheard Voices project; funding also covers project costs; evaluation and project support costs.

This page is intentionally left blank

MEETING: 20th June 2022

Ref: 19250

ASSESSMENT CATEGORY: Bridging Divides – Cornerstone Fund

AdviceUK

Adv: Sandra Jones

Base: Tower Hamlets

Benefit: London

Amount requested: £300,000.00

{Revised request : £342,380}

Amount recommended: £342,500

The Lead Organisation

Formed in 1979 under the name Federation of Independent Advice Centres, the organisation revised its articles and changed its name to AdviceUK in 2004 becoming the key co-ordinating body for independent advice providers in the UK with a membership of over 1,000 organisations, some 300 of which are based in Greater London. A registered charity, AdviceUK provides support to members and non-members in the areas of design and delivery of advice services, fundraising, workforce development, quality assurance and regulation, and products to support advice provision. It also seeks to influence stakeholders to create an environment that supports the provision of diverse, high quality advice services to a wide range of communities with a view to encouraging advice and support that makes a long-term difference to improving people's lives.

The Partnership

The partnership brought together by AdviceUK comprises eleven advice-giving organisations that serve marginalised and minority ethnic communities in London. The majority do not solely provide social welfare advice and support; all offer safe and trusted spaces in which people are supported to navigate a range of issues affecting their lives. Each organisation has participated in test-and-learn activities during the delivery stage and contributed towards the development of the Stage 2 application.

The eleven partners are: Account3; Age UK Lewisham and Southwark; Arachne Greek Cypriot Women's Group; IKWRO (Iranian and Kurdish Women's Rights); IMECE Women's Centre; Latin American House; London Chinese Community Centre; Merton Centre for Independent Living; Notre Dame Refugee Centre; Refugee Women's Association; Youth Legal; and AdviceUK, which will be leading on project management for the partnership.

The Proposal

Londoners in marginalised communities face multiple barriers in accessing social welfare advice to deal with the problems that they face. AdviceUK has been trialling the 'Whole Person, Whole community Approach' in Bristol and used the learning gathered there to begin developing communities of practice centred around marginalised communities in London and civil society organisations supporting them. The focus is on placing people with lived experience at the centre of the processes to re-design advice services.

Using the Whole Person, Whole Community Approach, during stage 1 of Cornerstone, AdviceUK identified that funder requirements make it more difficult for Londoners to get social welfare advice that can improve their lives. The current approach to measuring, monitoring, and evaluating social welfare advice services is limiting organisations' effectiveness. Stage 2 will therefore focus on monitoring and evaluating services. By using this approach, the collaboration will bring together Londoners from marginalised and BAME communities, advice givers, funders, and infrastructure organisations in order to ascertain what is happening currently and gain a shared view about whether current approaches to monitoring and evaluating advice services match the collective desire to improve the lives of Londoners. It will also enable key players in the system to challenge their assumptions about how performance should be measured and remove practices that get in the way of doing the right thing for those who are seeking advice. This should lead to creating new ways of supporting the advice sector and the communities they serve, making visible the value of an approach to social welfare advice that is not 'one size fits all'.

Following discussion at the assessment meeting, a revised budget has been submitted as there have been dramatic increases and forecasts for the rate of inflation and talking to partners it was felt that the impact of inflation had been underestimated. Some additional costs have also been identified through assessment.

Cornerstone Fund Outcomes

This proposal meets all the long-term outcomes outlined in the Cornerstone Outcomes framework, namely, building capacity and capability; drawing on co-production; improved gathering and use of data and intelligence; enabling voice and influence and involving partners in collaborative working practices.

Equality Considerations

The partners involved in the proposal support marginalised communities and are predominantly user led, with the proposal focused on involving and consulting advice service users. AdviceUK has 230 members in London, of which over 60 are focused on supporting minority ethnic communities and 30 are focused on supporting other communities of interest such as Deaf and disabled people's organisations. The aim of the proposal is to challenge systemic discrimination faced by marginalised communities.

Financial Information

AdviceUK 2020/21 accounts reflect the strong financial position of the organisation which is due to its highly diversified income across twenty income streams including members, other advice agencies, grants, donors and contractual customers with the majority of income coming from unrestricted sources. The organisation has managed to remain buoyant despite the pandemic.

| Year end as at | 2021 | 2022 | 2023 |
|-----------------------------------|------------------|------------------|------------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 3,593,588 | 2,681,436 | 2,611,356 |
| Expenditure | (3,224,418) | (2,607,097) | (2,591,712) |
| Gains/(losses) | 35,796 | 0 | 0 |
| Surplus/(deficit) | 404,966 | 74,339 | 19,644 |
| Reserves: | | | |
| Total endowed | 0 | 0 | 0 |
| Total restricted | 101,517 | 101,517 | 101,517 |
| Total unrestricted | 2,062,570 | 2,136,909 | 2,156,553 |
| Total reserves | 2,164,087 | 2,238,426 | 2,258,070 |
| Of which: free unrestricted | 1,318,631 | 1,392,970 | 1,412,614 |
| Reserves policy target | 400,000 | 400,000 | 400,000 |
| Free reserves over/(under) target | 918,631 | 992,970 | 1,012,614 |

The Recommendation

AdviceUK, one of the major advice sector infrastructure organisations in the UK, has established a strong partnership of small organisations serving marginalised communities. The partnership have developed a proposal that will challenge funders around how they monitor and evaluate advice services, which will lead to systemic change that could change systems wider than just for the advice sector. A revised budget has been submitted which is realistic and is supported.

£342,500 over three years (£106,200; £117,400; £118,900) towards a project whereby AdviceUK and 11 organisations will use a Whole Person, Whole Community approach will co-produce a challenge to funders on the way current monitoring and evaluation of advice services are limiting their effectiveness.

This page is intentionally left blank

MEETING: 20th June 2022

Ref: 19237

ASSESSMENT CATEGORY: Bridging Divides - Cornerstone Fund

Global Black Thrive CIC

Adv: Sandra Jones

Base: Lambeth

Amount requested: £298,130

Benefit: Lambeth

Amount recommended: £298,200

The Lead Organisation

Black Thrive Lambeth (BTL) is a partnership of communities and services focused on the borough and working to address the inequalities and structural barriers that impact on the mental health and wellbeing of Black people in Lambeth. BTL delivers this work by engaging with Black people, seeking to improve outcomes in statutory and voluntary organisations provision, identifying priorities for joint community and cross-sector action to address inequalities, and advocating for change in the conditions that hold Black mental health inequality in place. BTL was part of Healthwatch Lambeth from 2016 and transferred to Black Thrive Global (a registered Community Interest Company) on 1 April 2021.

The Partnership

No Wrong Door (NWD) is a partnership of six organisations and four individuals with lived experience who have come together to develop new approaches and ways of working with Black Disabled people around employment in Lambeth. The partners have changed slightly for Stage 2 and are Disability Advice Service Lambeth (DASL), First Steps Trust, High Trees Community Development Trust, Renaisi, Vocation Matters, Black Thrive Lambeth and 4 people with lived experience. Other organisations that will work closely with the partnership include Mosaic Clubhouse, Status Employment, and Lambeth Living Well Network Alliance.

The Proposal

Black people disproportionately have more serious mental illness and other long-term health conditions and are more likely to be unemployed or in low paid insecure work. The situation has been exacerbated by the Covid-19. When trying to find work, research and resident feedback show that the Department for Work and Pensions system is not effective at supporting disabled people into employment. There are over 130 organisations providing employment support in Lambeth, but the support is not coherent making it difficult for Disabled Black people to find the right support.

This was brought into focus at the assessment meeting by one of the people with lived experience, a carer. When asked what success might look like, this individual stated that Black Disabled people should be treated with empathy and compassion, with organisations that work with them treating them with humanity and that they should not have to repeat their situation every time that they meet different agencies, building up positive relationships.

Over the next three years, NWD will work towards creating a human-centred system in which a referral for any employment support provider in Lambeth would lead the individual to a service which meets their needs, so there will be no 'wrong door' for any Black and/or Disabled individual seeking help. This proposal will test a mini-

system of community-based providers to pilot new ways of working that specifically address the needs of Black Disabled people. the overall aims are to improve residents' experience of accessing employment support, improve the coordination and quality of employment support providers for Black Disabled residents, promote the partnership's learning, and influence statutory employment services and commissioners.

Building on existing knowledge of the employment support landscape in Lambeth, BTL will co-produce a strategic approach, widening the collaborative structure over the life of the project. This will include developing and testing practical tools for partnership working, coordinating services, and improving quality standards and competencies of partner organisations and wider service providers. A Charter will be co-designed for each partner to create a set of shared values, expectations, and accountabilities, reduce competition, and improve referral pathways between employment services.

One of the partners, High Trees Community Development Trust is the lead organisation of a separate Cornerstone application which was considered and agreed at the March 2022 Grants Committee meeting. That proposal was a partnership bid on 'Building Young Brixton' and Global Black Thrive is one of the partners.

The partnership had encountered some problems during the development stage, which culminated in Black Thrive being the employer for the role that will include recruiting the people with lived experience rather than DASL, but there will be a dotted line to DASL. Apart from that, the partnership has been developing well over the last year which included changing some of the partners, and it has a strong foundation ready for the next phase.

Cornerstone Fund Outcomes

This proposal meets all the long-term outcomes outlined in the Cornerstone Outcomes framework, namely, building capacity and capability; drawing on co-production; improved gathering and use of data and intelligence; enabling voice and influence and involving partners in collaborative working practices. The ambition is to widen participation of employment service providers by the end of the three years.

Equity Considerations

The partnership is challenging the systemic discrimination, exclusion and marginalisation faced by Black Disabled people in accessing employment services. The members of the partnership range from user led projects within public sector organisations, community groups and the lead organisation is a black-led organisation, with DASL being a Deaf and Disabled People's Organisation (DDPO). Key to the project is that the work will be co-produced and co-designed with people with lived experience, ensuring that intersectional experiences are at the fore.

Financial Information

Until April 2021 Black Thrive was part of Healthwatch Lambeth, when it became part of Global Black Thrive CIC (registered on 2 June 2020). Global Black Thrive accounts include financial activity for Black Thrive Lambeth from 2 June 2020 to 30 June 2021, with the full income and expenditure of the independent organisation only showing in these accounts from 1 April 2021 to 30 June 2021, once the relationship with Healthwatch Lambeth had ended. The income increase in 2022 and 2023

accounts is because it now has a full year of activity as an independent organisation compared to the three months in the 2021 accounts, and includes the income from Black Thrive Lambeth. The table below shows that it has a reasonable level of reserves from FYE 2022.

| Year End 30 June | 2021 | 2022 | 2023 |
|---|-----------------|-------------------------------------|----------------|
| | Signed accounts | Forecast/ Management accounts | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 210,759 | 1,676,322 | 1,652,725 |
| - % of Income confirmed as at | 100% | 100% | 75% |
| Expenditure | (203,882) | (1,102,668) | (1,648,796) |
| Total profit/(loss) | 6,877 | 573,654 | 3,929 |
| Operating expenditure | 203,882 | 1,102,668 | 1,648,796 |
| Balance sheet: | | | |
| Net assets/(liabilities) | 6,877 | 580,531 | 584,460 |
| <i>Of which:</i> | | | |
| Profit & loss reserves | 6,877 | 580,531 | 584,460 |
| | 6,877 | 580,531 | 584,460 |
| Months' expenditure covered by reserves | 0.40 | 6.32 | 4.25 |

The Recommendation

This proposal aims to challenge the way Black Disabled people are treated when using employment services. The expectation is that lessons from this work and toolkits established could be used more widely. Black Thrive Lambeth has been operating for several years under the umbrella of Healthwatch Lambeth and during this time has become an important organisation in the field of mental health services, with the CEO being on Lambeth Together, the overarching strategic partnership around health and social care in Lambeth, taking on an influencing role. The proposal is well thought through and costed and supported at the full amount.

£298,200 over three years (£111,400; £93,400; £93,400) towards a project to build No Wrong Door, a partnership to create a human-centred system in which a referral for any employment support provider in Lambeth would lead the individual to a service which meets their needs, so there will be no 'wrong door' for any Black and/or Disabled individual seeking help.

This page is intentionally left blank

| Committee | Date |
|---|---------------------|
| Grants Committee of the Bridge House Estates Board | 20 June 2022 |
| Subject: Grant Funding Activity: period ended 6 June 2022 | Public |
| Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> does this proposal aim to support? | 1, 2 and 3 |
| Which Bridging Divides Funding Strategy priority does proposal aim to support? | All |
| Does this proposal require extra revenue and/or capital spending? | No |
| Report of: David Farnsworth, Managing Director of BHE | For Decision |
| Report author: Scott Nixon, Head of Managing Director's Office | |

Summary

This report provides details of: funds approved and rejected under delegated authority since the last meeting of the Grants Committee in March 2022 through to 6th June 2022; any grant variations that have been approved under delegated authority; and seeks the Committee's approval for 1 grant rejection.

Recommendations

The Grants Committee is recommended to:

- i) Receive this report and note its contents;
- ii) Approve the rejection of 1 grant application listed in appendix 3

Main Report

Budget and Applications update

1. There have been 57 grants awarded from the main grant's programme, with the spend to date £2.625m. This leaves the remaining budget for 2022/23 at £97.383m.
2. In addition to the grants listed in **Appendix 1**, 12 applications were withdrawn and 4 lapsed since the last meeting to 6 June 2022.
3. A full budget can be seen in **Appendix 1**. Heat maps of spending are shown in **Appendix 2**.

Grant Rejections

4. The one application above the level delegated to officers recommended for rejection at this meeting is listed within **Appendix 3**. In each case the "purpose" of the application is that provided by the applicant organisation. The reasons are specified following assessment against the Bridging Divides funding strategy criteria and related Policy Guidance.

5. 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 CBT office in advance of the meeting so that an explanation can be provided prior to or at the meeting.
6. A list of all rejections approved in line with the current delegated authority procedure are provided within **Appendix 3a**.

Grant Variations

7. Variations to the grants outlined have been agreed by the Managing Director of BHE or the CBT Associate Director, in line with the delegated procedure for the amendment of grants. Details of all variations are provided at **Appendix 4**.

Funds approved or declined under delegated authority

8. The details provided at **Appendix 5** advises the Grants Committee of funds approved under delegated authority and urgency procedures from February 2022 to 6th June 2022.

Feedback on CBT

9. The Impact & Learning Team review feedback from our funded organisations on a quarterly basis. This feedback primarily comes from our annual Impact & Learning forms (formerly called Evaluation & Monitoring forms), plus anonymous feedback from GrantAdvisor. In **Appendix 6**, insights from February – April 2022 have been collated, focussing on new learning as well as opportunities for improvements, with the feedback received being generally very positive overall.

Appendices:

- Appendix 1: Budget and applications update
- Appendix 2: Heat maps of Index of Multiple Deprivation, Bridging Divides spend to date and this meeting's grants
- Appendix 3/3a: Grant rejections
- Appendix 4: Grant variations
- Appendix 5: Funds approved or declined under delegated authority under urgency requests
- Appendix 6: CBT Feedback

Scott Nixon

Head of Managing Director's Office

E: scott.nixon@cityoflondon.gov.uk

Appendix 1: Budget for main grants programmes and restricted funds to date (22/23 financial year).

| | Designated Fund - Bridging Divides, Cornerstone, Bridge Fund | Restricted funds - LCRF, TFL, RRR2 | TOTAL |
|---|---|--|----------------|
| <i>Date of this report: 06/06/2022</i> | | | |
| | £'000 | | |
| Funds balance at 1 April 2022 per draft accounts | 207,967 | 297 | 208,264 |
| Already earmarked for projects | (349) | 0 | (349) |
| Funds available for grantmaking at 1/4/22 | 207,618 | 297 | 207,915 |
| Grants awarded 2022/23 | | | |
| <i>Grants reported to/approved by Committees to date</i> | 0 | 0 | 0 |
| <i>Delegated authority grants financial YTD</i> | 2,625 | 0 | 2,625 |
| TOTAL AWARDED TO DATE OF REPORT | 2,625 | 0 | 2,625 |
| Number of grants awarded | 57 | 0 | 57 |
| Write backs, variations & revocations financial YTD | (2) | 0 | (2) |
| Number of grants revoked, varied or written back | 3 | 0 | 3 |
| Other costs incl. staff costs associated with £200m uplift | (60) | 0 | (60) |
| Conditional grants* | (203) | 0 | (203) |
| Stepping Stones loan awarded under Bridging Divides* | (50) | 0 | (50) |
| TOTAL SPENT/ALLOCATED TO DATE | 2,311 | 0 | 2,513 |
| Subtotal: available at the date of this report | 209,929 | 297 | 210,428 |
| Total grants recommended for approval 20 June 2022 | (7,280) | 0 | (7,280) |
| Remaining funds available | 202,649 | 297 | 203,149 |
| 2022/23 budget summary | | | |
| Approved Grants Budget 2022/23 | 101,490 | 0 | 101,490 |
| Add non-grant spend budget 2022/23 | 830 | 0 | 830 |
| Add restricted funds brought forward | 0 | 180 | 180 |
| Budget for 2022/23 | 102,320 | 180 | 102,500 |
| <i>Grants awarded to date of this report net of revocations</i> | (2,627) | 0 | (2,627) |
| <i>Other costs and allocations</i> | (312) | 0 | (312) |
| Budget available to Committee at report date | 99,380 | 180 | 99,560 |
| Baobab funds not yet committed | (2,000) | 0 | (2,000) |
| Remaining budget available | 97,380 | 180 | 97,560 |

*Awarded in 21/22 but continue to reduce available funds in 22/23

Appendix 2: Heat maps of Index of Multiple Deprivation (average score for borough), Bridging Divides spend to date (£), and this meeting's grants (£)

Note that CBT data is categorised by the borough location of the funded organisation. Support from that organisation may go to the same or other boroughs. Not all grants have this data recorded. In Figures 2-5 below, darker colours correlate to more money.

Figure 1: Index Multiple Deprivation (Average borough score) – dark colours = more deprivation



Figure 2: All grants from start of Bridging Divides (September 2018) to November 2021 committee (excluding LCRF)



Figure 3: Bridging Divides grants for this committee



Figure 4: Same data as above – per 1000 population¹ – but EXCLUDING City of London as the small population size here skews the comparison to ~100 times more than any other borough



Figure 5: Same data as above – per 1000 population - but EXCLUDING City of London again



¹ 2020 data from ONS via <https://www.statista.com/statistics/381055/london-population-by-borough/>

Appendix 3: Grant Rejections for approval

Grants Recommended for Rejection

| Request Date | Ref | Organisation | Purpose | Reason for Recommendation for Rejection | Amount Requested | Funding Manager | Area |
|--|-------|---|---|---|------------------|-----------------|---------|
| <u>Bridging Divides</u> | | | | | | | |
| <u>Advice and Support</u> | | | | | | | |
| February 2022 | 19135 | Agudas Israel Community Services (AICS) | We are seeking funding for the costs of the business consulting services which provides support and advice to clients becoming independent business owners. | Funds are requested for a business readiness programme, which is not a close fit with CBT’s funding priorities under the advice and support strand. The sums requested are also at risk of breaching CBT’s rule of not funding more than 50% of an organisation’s turnover. | £317,250 | Julia Mirkin | Hackney |
| <i>Total Advice and Support (1 item)</i> | | | | | £317,250 | | |
| Grand Totals (1 item) | | | | | £317,250 | | |

Appendix 3a: Grant rejections

Requests rejected under delegated authority (£250,000 or less)

| Ref | Organisation | Type | Date Declined | Requested Amount | Funding Manager | Declination Comments |
|-------|---|---------------------------------------|---------------|------------------|------------------|---|
| 19101 | Acheinu Limited T/A The Boys Clubhouse | Transition Funding - Bridging Divides | 03/05/2022 | £34,540 | Nat Jordan | The application does not meet your criteria under this strand as the proposed activities are primarily focused on exercise and nutrition rather than specialist mental health support, and its outcomes, which include physical health and employment skills, are insufficiently focused on mental health. |
| 19043 | Acme Artists Studios Ltd | Bridging Divides | 03/05/2022 | £4,050 | Lydia Parr | The applicant has applied for an access audit for two buildings containing artist studios with little to no wider community use. As such this does not meet the criteria of your programme of the building and activities benefitting the wider community. |
| 19127 | Becontree Heath Islamic Society (Dagenham Central Masjid) Ltd | Small Grants - Bridging Divides | 10/03/2022 | £10,000 | Matthew Robinson | The organisation holds no free reserves and has significant liabilities, according to the financial information presented. In addition, the project's target audience appears broader than the beneficiaries defined by the Small Grants Programme's criteria. |
| 19090 | BeLifted | Transition Funding - Bridging Divides | 03/05/2022 | £30,000 | Julia Mirkin | BeLifted has applied for support for its advice work, which represents a small proportion of its total activity and falls outside its charitable objects. BeLifted is at an early stage of development and its application points to a number of capacity issues. The request is equal to total grant receipts in the last year and the proposed outcomes are broader than those of your Advice and Support funding programme. Finally, the applicant does not hold a quality mark for its advice work, which is a condition for your funding in this area. |

| Ref | Organisation | Type | Date Declined | Requested Amount | Funding Manager | Declination Comments |
|-------|--|---------------------------------------|---------------|------------------|-------------------|--|
| 18990 | Calm Minds-UK | Bridging Divides | 03/05/2022 | £43,420 | Anneka Singh | The applicant has limited track record for the proposed work, and seeks a grant amount which your officer cannot recommend. |
| 19016 | Cockfosters and N Southgate Synagogue | Bridging Divides | 03/05/2022 | £5,000 | Lydia Parr | The constitution of the United Synagogue, the 'umbrella' charity of Cockfosters and North Southgate Synagogue, does not have a dissolution clause therefore the organisation is ineligible for funding from City Bridge Trust. |
| 19199 | Digital Opportunity Skills Training C.I.C. | Bridging Divides | 03/05/2022 | £85,750 | Wai Chan | This application does not sufficiently fit your current priorities or criteria. |
| 19164 | Find Your Voice | Transition Funding - Bridging Divides | 03/05/2022 | £64,800 | Anneka Singh | The organisation would need to have stronger governance controls in place before a City Bridge Trust grant award could be recommended. |
| 19078 | Hundred Flower Cultural Centre | Small Grants - Bridging Divides | 07/03/2022 | £27,441 | Caspar Cech-Lucas | The application does not sufficiently meet the priorities for your Small Grants Programme |
| 19015 | Just Kidding | Small Grants - Bridging Divides | 10/03/2022 | £50,000 | Matthew Robinson | The organisation's latest financial accounts have not been externally scrutinised by an independent examiner, as required by charity law. |
| 19377 | Outset Contemporary Art Fund | Eco Audits | 06/05/2022 | N/A | Lydia Parr | Organisation building has less than 2 years remaining on lease therefore is ineligible. |
| 19062 | Positive View Foundation | Transition Funding - Bridging Divides | 03/05/2022 | £40,000 | Anneka Singh | The proposed work does not fit with City Bridge Trust's priorities and therefore cannot be recommended. |
| 19231 | Shop and Donate CIC | Small Grants - Bridging Divides | 07/03/2022 | £10,000 | Caspar Cech-Lucas | The application does not sufficiently meet the priorities for your Small Grants Programme. |

| Ref | Organisation | Type | Date Declined | Requested Amount | Funding Manager | Declination Comments |
|--------------------------------|-----------------------------|--|---------------|------------------|-----------------|---|
| 19158 | Stationers' Hall Charity | Bridging Divides | 03/05/2022 | £100,000 | Nat Jordan | This request is for works installing a lift at Stationers Hall which are due to have commenced by the time a decision could be made. It is therefore ineligible due to your policy not to fund retrospectively. |
| 19104 | Power2 | Transition Funding - Bridging Divides | 03/05/2022 | £95,507 | Aasha Farah | The proposed work does not fit your funding criteria sufficiently well. |
| 18899 | True You Today CIC | Small Grants - Bridging Divides | 11/03/2022 | £5,040 | Lydia Parr | The organisation is a Community Interest Company limited by shares and is therefore ineligible for funding from City Bridge Trust. |
| 19218 | Unique Community Charity | Transition Funding - Bridging Divides | 03/05/2022 | £75,180 | Anneka Singh | This proposal does not sufficiently meet City Bridge Trust's current priorities. |
| 19252 | Unity Music Arts Team C.I.C | Small Grants - Bridging Divides | 18/05/2022 | £30,000 | Lorna Chung | There is insufficient evidence that the organisation's governance and oversight is robust enough for it to be funded at this time. |
| Grand Totals (18 items) | | | | £700,729 | | |

Appendix 4: Grant variations

1. Citizens Advice Southwark

On 23/11/2017 a grant of £3,000 was awarded to Citizens Advice Southwark for an Eco-Audit. The grant is being revoked as it has not been possible to get a response from organisation on their update visit and workshop, despite several attempts. Eco Auditor has agreed to close the Eco Audit down.

The recommendation agreed was:

That a sum of £1400 out of the grant of £3,000 to Citizens Advice Southwark be revoked.

2. St Luke's Parochial Trust

On 25/07/2019 a grant of £2,800 was awarded to St Luke's Parochial Trust for the purpose of an eco-audit and the associated costs. After all activities have taken place a balance of £600 remains, therefore a revocation of the remainder is recommended.

The recommendation agreed was:

That a sum of £600 out of the grant of £2,800 to St Luke's Parochial Trust be revoked.

3. Mental Health Foundation

On 26/09/2019 a grant of £2,400 was awarded to Mental Health Foundation for the purpose of an eco-audit and the associated costs. After all activities have taken place a balance of £200 remains, therefore a revocation of the remainder is recommended.

The recommendation agreed was:

That a sum of £200 out of the grant of £2,400 to Mental Health Foundation be revoked.

Appendix 5: Funds approved or declined under delegated authority or under urgency (24th February 2022 to 6th June)

Requests approved under delegated authority (£250,000 or less)

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|-----------------------------|------------------|---|------------------|--------------------|
| 18897 | Active Living Support CIC | 05/06/2022 | £20,000 over two years (£10,000; £10,000) towards street and contemporary dance sessions for disadvantaged young people aged between 10- and 16-years old living with physical and mental disabilities. | Lydia Parr | £20,000 |
| 19202 | Age UK Kensington & Chelsea | 31/05/2022 | £87,500 over two years (£44,000; £43,500) towards the core costs of the Activities and Events service. | Lorna Chung | £87,500 |
| 19399 | Age UK London | 26/05/2022 | £3,600 to resource Age UK to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Age UK's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Age UK's core running costs over the next twelve months. | Aasha Farah | £3,600 |
| 19393 | All Ways Network (AWN) | 26/05/2022 | £3,750 to resource All Ways Network to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource All Ways Network's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards All Ways Network's core running costs over the next twelve months. | Khadra Aden | £3,750 |
| 19125 | Barts Heritage | 23/05/2022 | £95,000 over three years (£500; £45,500; £49,000) towards the costs of the access works of the North Wing's phase one renovation. | Matthew Robinson | £95,000 |

DA Approval

| Ref | Organisation | Recommended Date | Grant Recommendation | Funding Manager | Amount |
|------------|---|-------------------------|--|------------------------|---------------|
| 19094 | Blackhorse Workshop CIC | 11/04/2022 | £2,600 (6.5 days) to provide an eco-audit. | Lydia Parr | £2,600 |
| 19095 | Blackhorse Workshop CIC | 06/04/2022 | £4,134 to provide access and inclusive design training for staff and to conduct an access audit of the current building and seek advice on access considerations for the new building. | Lydia Parr | £4,134 |
| 19385 | Breaking Barriers | 30/05/2022 | £3,000 to resource Breaking Barriers to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Breaking Barriers' involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Breaking Barriers' core running costs over the next twelve months. | Clara Espinosa | £3,000 |
| 19438 | Campaign to Protect Rural England - London Branch | 31/05/2022 | £8,450 over one year to CPRE London towards the LFGN Network Development Officer and associated project costs to maintain the GoParksLondon website. | Wai Chan | £8,450 |
| 19430 | Child Poverty Action Group | 30/05/2022 | £3,000 to resource Child Poverty Action Group to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource CPAG's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards CPAG's core running costs over the next twelve months. | Clara Espinosa | £3,000 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|---------------------------------|------------------|--|-----------------|--------------------|
| 19420 | CARAS | 30/05/2022 | £3,450 to resource CARAS to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource CARAS' involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards CARAS' core running costs over the next twelve months. | Clara Espinosa | £3,450 |
| 19411 | Consortium LGBT | 30/05/2022 | £3,450 to resource Consortium LGBT to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Consortium LGBT's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Consortium LGBT's core running costs over the next twelve months. | Clara Espinosa | £3,450 |
| 19381 | Council of Somali Organisations | 30/05/2022 | £3,600 to resource Council for Somali Organisations to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource CSO's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards CSO's core running costs over the next twelve months. | Clara Espinosa | £3,600 |
| 19278 | Cranfield Trust | 11/05/2022 | £151,460 for a further and final 12 months of support to Cranfield Trust's Strive Programme of consultancy and mentoring for London-based charitable organisations. | Tim Wilson | £151,460 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|---|------------------|--|------------------|--------------------|
| 19279 | Cripplegate Foundation | 06/04/2022 | £30,000 over 3 years towards the Islington Together partnership, with funding in years 2 and 3 conditional on the London Borough of Islington confirming its continued financial support each year. | Matthew Robinson | £30,000 |
| 19429 | DINN Enterprise CIC | 30/05/2022 | £3,000 to resource Do It Now Now to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Do It Now Now's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Do It Now Now's core running costs over the next twelve months. | Clara Espinosa | £3,000 |
| 19105 | East End Citizens Advice Bureaux | 17/05/2022 | £180,400 over three years (£57,400, £58,400, £64,600) towards a FTE Advisor/Caseworker and project related costs to provide social welfare advice to women in Hackney. | Kelvin Ha | £180,400 |
| 19302 | Edible Landscapes London | 26/05/2022 | £20,000 over two years (£10,000 x 2) to fund 1.5 days p/w Project Co-ordinator. Funding for year 2 is conditional upon confirmation that funding of at least £10,000 is secured for 2022/23. | Anneka Singh | £20,000 |
| 19387 | End Violence Against Women Coalition (EVAW) | 30/05/2022 | £3,600 to resource End Violence Against Women to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource EVAW's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards EVAW's core running costs over the next twelve months. | Clara Espinosa | £3,600 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|--|------------------|---|-------------------|--------------------|
| 19073 | English National Ballet | 05/06/2022 | £99,700 (£49,100; £50,600) over two further and final years towards ENB's dance classes for older people, specifically ENBEldersCo, Leap of Faith, and Dancing East. Funding will go towards artist fees, production costs, and staff time. | Caspar Cech-Lucas | £99,700 |
| 19398 | London Youth | 26/05/2022 | £3,000 to resource London Youth to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource London Youth's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards London Youth's core running costs over the next twelve months. | Aasha Farah | £3,000 |
| 19048 | Fields in Trust | 14/04/2022 | £2,200 (5.5 days) to provide an eco-audit. | Lydia Parr | £2,200 |
| 19224 | Friends of Chislehurst & Walden Recreation Grounds | 03/05/2022 | £11,900 over five years (£2,900; £2,200; £2,500; £1,200; £3,100) towards Gardening Club and Environmental Group activities and the associated volunteer costs | Lorna Chung | £11,900 |
| 19410 | Greater London Volunteering | 26/05/2022 | £3,600 to resource London Plus to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource London Plus' involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards London Plus' core running costs over the next twelve months. | Khadra Aden | £3,600 |
| 18861 | Hammersmith and Fulham Law Centre | 17/05/2022 | £119,700 for a further and final two years (£58,800, £60,900) for a f/t solicitor and contribution to organisational overheads to develop an Anti-Child Poverty Unit. | Clara Espinosa | £119,700 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|--|------------------|---|-----------------|--------------------|
| 19153 | Hawa Trust Limited | 25/05/2022 | £19,830 over two years (£9,830; £10,000) to contribute to the running costs of Hawa Trust Limited's 'The African Women's' yoga project. | Aasha Farah | £19,830 |
| 19388 | HEAR Equality and Human Rights Network | 25/05/2022 | £3,600 to resource HEAR Equality and Human Rights Network to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource HEAR Equality and Human Rights Network's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards HEAR Equality and Human Rights Network's core running costs over the next twelve months. | Khadra Aden | £3,600 |
| 19118 | Home-Start Camden and Islington | 11/04/2022 | £73,200 over two years (£36,000; £37,200) towards HSCI's family support service, including 1 0.4 FTE Head of Services, volunteer recruitment and training costs and related project overheads. | Anneka Singh | £73,200 |
| 19064 | Hope Family Trust | 13/05/2022 | £65,400 (£21,600; £21,600; £22,200) for the part-time Volunteer Co-ordinator (2dpw) and associated project costs towards the foodbank volunteer programme. | Clara Espinosa | £65,400 |
| 19397 | The Housing Associations' Charitable Trust | 26/05/2022 | £3,000 to resource Housing Associations' Charitable Trust to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource HACT's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards HACT's core running costs over the next twelve months. | Aasha Farah | £3,000 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|-------------------------------|------------------|---|-----------------|--------------------|
| 19396 | Inclusion London | 26/05/2022 | £3,000 to resource Inclusion London to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Inclusion London's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Inclusion London's core running costs over the next twelve months. | Aasha Farah | £3,000 |
| 19210 | Island House Community Centre | 03/05/2022 | £48,160 over two years (£24,080 x 2) towards Community HEALTH, covering costs associated with 1 day/week Project Manager, sessional staff, and related project overheads. | Anneka Singh | £48,160 |
| 19323 | Justice Collaborations | 06/04/2022 | £62,400 over 12 months towards a level 2 / level 3 OISC accredited immigration adviser and a programme of wider welfare support to increase the East European Resource Centre's capacity to support enquiries from London's Ukrainian community (as well as Londoners from countries neighbouring Ukraine whose home communities are affected by the current war). Funding to be directed via Justice Collaborations. | Tim Wilson | £62,400 |
| 19386 | Latin American House | 25/05/2022 | £3,600 to resource Latin American House to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Latin American House's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Latin American House's core running costs over the next twelve months. | Aasha Farah | £3,600 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|---------------------------|------------------|--|------------------|--------------------|
| 19220 | The Leaside Trust | 10/05/2022 | £45,000 over one year for the costs of an architect's feasibility study, a fixed number of business analyst consultant hours, and a pilot programme of environmental education classes. | Matthew Robinson | £45,000 |
| 19400 | London Play | 26/05/2022 | £3,600 to resource London Play to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource London Play's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards London Play's core running costs over the next four months. | Aasha Farah | £3,600 |
| 19042 | Magpie Dance | 03/05/2022 | £66,670 over two further and final years (£33,335; £33,335) for costs associated with delivering Youth, Community and Adult dance activities for people with learning disabilities in London. | Julia Mirkin | £66,670 |
| 19098 | The Mary Dolly Foundation | 16/05/2022 | £49,140 over two years (£24,570; £24,570) deliver therapeutic interventions to children and young people who have experienced emotional, physical, domestic and/or sexual abuse. | Aasha Farah | £49,140 |
| 19044 | Masorti Judaism | 06/04/2022 | £90,800 over four years (£24,400; £24,600; £19,100; £22,700) towards the costs of running emerging leaders' courses, a leaders' network, and leadership pipeline pack. | Sandra Jones | £90,800 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|--|------------------|---|------------------|--------------------|
| 19247 | Maternity Action | 14/04/2022 | £100,000 over two further and final years (£49,500; £50,500) for a p/t Advice Worker (28hrs) to provide a London specific telephone advice service with additional appointment-based advice and outreach work to develop relationships with frontline services supporting pregnant women on low incomes. | Matthew Robinson | £100,000 |
| 19264 | Maxability | 25/05/2022 | £24,380 over three years (£7,740; £8,120; £8,520) for 'Hands on the Wheel', a project delivering ceramics courses to children and young people. | Lorna Chung | £24,380 |
| 19389 | Partnership for Young London | 25/05/2022 | £3,600 to resource Partnership for Young London to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Partnership for Young London's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Partnership for Young London's core running costs over the next twelve months. | Khadra Aden | £3,600 |
| 19065 | Rainham Foodbank | 17/05/2022 | £124,000 over three years (£40,000, £41,500, £42,500) towards the costs of the foodbank Centre Coordinator and associated food distribution costs supporting people facing food poverty. | Wai Chan | £124,000 |
| 19121 | Roald Dahl's Marvellous Children's Charity | 10/04/2022 | £109,810 (£54,360; £55,450) over two years for a Roald Dahl Transition Nurse. | Anneka Singh | £109,810 |
| 19077 | Royal Greenwich Heritage Trust | 24/05/2022 | £4,375 to fund access and inclusive design training for staff and carry out an independent access audit to improve access to Charlton House and Gardens. | Lydia Parr | £4,375 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|-------|-----------------------|------------------|---|------------------|--------------------|
| 19409 | Sisters of Frida CIC | 26/05/2022 | £3,750 to resource Sisters of Frida to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Sisters of Frida's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Sisters of Frida's core running costs over the next twelve months. | Khadra Aden | £3,750 |
| 19380 | Spectra CIC | 30/05/2022 | £3,000 to resource Spectra to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Spectra's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Spectra's core running costs over the next twelve months. | Clara Espinosa | £3,000 |
| 19129 | St James Garlickhythe | 11/04/2022 | £2,200 (5.5 days) to provide an eco-audit | Lydia Parr | £2,200 |
| 19256 | St Leonard, Streatham | 31/05/2022 | £2,400 (6 days) to provide an eco-audit. | Lydia Parr | £2,400 |
| 19236 | Streetwise Opera | 03/05/2022 | £94,000 over two further and final years (£46,000; £48,000) towards the delivery of services and activities offered to people experiencing homelessness (performers) across London, including contributions towards the London Programme Producer's salary, activities programme running costs, and organisational overhead costs. | Matthew Robinson | £94,000 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|------------|---------------------------------|-------------------------|--|------------------------|---------------------------|
| 19436 | Voluntary Action Harrow CIC | 26/05/2022 | £3,600 to resource Voluntary Action Harrow to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Voluntary Action Harrow's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Voluntary Action Harrow's core running costs over the next twelve months. | Aasha Farah | £3,600 |
| 19479 | Women for Refugee Women | 31/05/2022 | £3,000 to resource Women for Refugee Women to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Women for Refugee Women's involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards Women for Refugee Women's core running costs over the next twelve months. | Aasha Farah | £3,000 |
| 19041 | Work Rights Centre | 10/04/2022 | £240,000 over five years (£46,000; £47,000; £48,000; £49,000; £50,000) to fund the full-time Service Provision Manager to coordinate advice work in London, with a contribution to organisational overhead costs proportionate to the share of the organisation's activities being delivered in London | Matthew Robinson | £240,000 |
| 19088 | Youth Legal and Resource Centre | 03/05/2022 | £69,500 for two further and final years (£33,500; £36,000) for a part-time Debt and Money Advice Caseworker (3dpw) and associated project costs. | Clara Espinosa | £69,500 |

| Ref | Organisation | DA Approval Date | Grant Recommendation | Funding Manager | Recommended Amount |
|--------------------------------|----------------------------|------------------|---|-----------------|--------------------|
| 19139 | Youth on the Move (London) | 06/04/2022 | £50,000 over five years (£10,000; £10,000; £10,000; £10,000; £10,000) to run an arts and performance project that will integrate young people with disabilities with mainstreamed young people. | Aasha Farah | £50,000 |
| 19240 | Young Women's Trust | 30/05/2022 | £71,800 for a further two and final years (£35,000, £36,800) towards the project running costs for Work It Out in London. | Clara Espinosa | £71,800 |
| Grand Totals (56 items) | | | | | 2£2,316,909 |

² Note that this figure does not agree with the total grants awarded to date figure included in the table in Appendix 1. This is due to one of the grants in this year's total (Inclusion London) being approved at the last GC but the grant offer letter was only sent out (resulting in financial recognition) in April 2022



Impact & Learning from our Funded Orgs

February - April 2022

Feedback on CBT

134

Impact & Learning Forms

95%

Rate us Very Good (77%) or Good (18%)

11

Anonymous GrantAdvisor Reviews

89%

Good rating on "reaching our goals"



APPLICATION TIME

Average: 8h ± 7h
One said 30 hours
(From GrantAdvisor)

APPLICATION TIME COMPARISON

PHF: 35h
Esmee Fairburn 17h
Lloyds 15h



APPLICATION ISSUES

"Some questions feel overlapping and your system is old and dated" - Anonymous



EFFECT ON FUNDRAISING

88% said we have a positive impact on their fundraising



TREND: POSITIVE IMPACT ON FUNDRAISING

Last 3 quarters:
92% - 88% - 89%
We are regularly doing this

FUNDRAISING: COMMON THEMES

- Our reputation adds credibility
- Longer grants increase sustainability
- Project funding helps build evidence base
- Helps develop networks & partnerships
- Increases staff capacity for fundraising

FUNDRAISING: FUNDER PLUS

"The extra support we are receiving through the Funders Plus programme will begin to have a significant positive impact in the coming months. That includes support with longer-term business and financial planning." Survivors Together

Positive Comments

Common themes:

We are flexible, supportive & communicative; FMs are helpful; core costs conversion, reduced reporting and longer grants appreciated; application process generally good and we support our funded organisations with more than money

NEW THINGS WE HEARD THIS TIME

- Funder Plus support beneficial
- Feedback on reports appreciated
- Newsletter helpful
- CBT understands sector
- Application support useful
- Networking & Learning Day great

New!

"One of the best charities around. City Bridge really understand Londoners and the organisations which support them."
Kentish Town Community Centre

"It's been particularly nice to receive feedback to our annual reports, which isn't all that common among funders." Magpie Dance

"We received a lot of support during the application process We now know what we need to do in order to be successful in large grant funding applications as a result of this experience." Hear Us

"We really appreciate the newsletter with funding news and training opportunities."
Jacksons Lane

Challenges & Improvements

Key challenges with CBT:

Confusion over reporting timescales, overpayment causing tax concerns, slow response to decision queries, objectives not revised or discussed before reporting

"When we asked you to approve a change in our delivery model it took longer than expected to get a response, which has delayed the project ... more information as to how long the decision-making process was going to take would have been useful."
Kensington and Chelsea Social Council



"I would have liked to have been able to discuss the desired outcomes prior to submitting this report as I knew that we had fallen short of reaching them due to Covid and the shift in our own priorities."
Young Camden Foundation

"There could be a newsletter created for all the organisations the trust funds, an online portal for organisations to highlight what they've done etc." InterAct Stroke Support



continues below...

Project Changes and Learning

February - April 2022



THIS
QUARTER'S
GIVING

Strategic Initiatives
£6.2M
11 grants

BD
£3.6M
27 grants

Cornerstone
£1.4M
4 grants

TOTAL
£11.6M
57 grants

PROJECTS REPORTING
CHANGES DUE TO
COVID

! 52% of projects
Last 3 quarters:
55% - 57% - 58%

TOP 3 REPORTED
CHANGE TYPES
DUE TO COVID

↑ Going hybrid
Getting back to
normal
Physical changes

PROJECT CHANGE
TYPE: BIGGEST DROPS
V NOV 21 - JAN 22

↓ Going online
Physical changes
Reduced services

Key Learning: Support for people's lived experience

FOR CLIENTS

"The need to feel safe to voice their needs and how this might be difficult in an environment led by those from other backgrounds. This had led to the development of the EDI Framework to help us make sure we are working with them in the right way and supporting leaders from within the community." Thames Estuary Partnership



FOR STAFF

"Working with consultants who have lived experience of the asylum system required us to ensure we have a strong understanding of their skills and experience in order to better identify potential support needed and how to provide it." Refugee Action

"We're increasingly aware of the impact of secondary trauma on our team members, specially for staff who have come from difficult backgrounds themselves. We are looking into providing clinical supervision." Carney's Community

"Identifying the need for external support in our organisational development ... we engaged a Member Involvement Consultant, Inspirit, to help us to give greater agency & decision-making power to our Members." Clean Break

"This project has helped us to become better equipped to support people who live with a disability, especially as we have seen an increase in staff and volunteers identifying as having a disability. This work has allowed us to explore more ways in which we can help everyone reach their full potential." Groundswell



Challenges and Concerns



DIGITAL MASKED SUPPORT NEEDS

"Working online also meant that some of the challenging realities young people were facing were easily masked from us. Once we began working in person, we were alerted to a number of safeguarding and wellbeing issues the young people had been experiencing." Kiln Theatre

SUPPORTING DIFFERENT CLIENT GROUPS

"Since Covid-19, the programme has engaged with a new demographics of clients, in particular women and young people experiencing mental health issues. This means CDARS needs to adapt our services to meet their specific needs." Community Drug and Alcohol Recovery Services

OVERWHELMING DEMAND

"Such was the demand on our helpline that we were forced to close it twice during the year in order to deal with large backlogs of enquiries." Disability Law Service



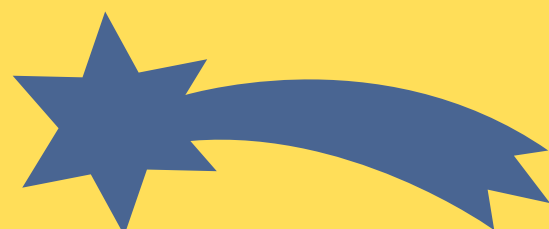
DIGITAL NOT SUITABLE FOR ALL

"There is a real issue for disabled people who rely on family members to be able to access online meetings. These people do need face to face interaction to fully benefit." Bromley Experts by Experience



Positives: Keeping to a long term goal

"It is worth holding a long term goal and taking small steps towards it... It has sometimes been frustrating and time consuming and takes significant effort to keep all the stakeholders involved moving together in the same direction over years... this year we have seen several of the steps towards that overall goal tied together as a whole and... it is very rewarding to see the change." Freightliners City Farm



Feedback to Emma, Jen or
impact@cityoflondon.gov.uk

Document is Restricted

This page is intentionally left blank

Document is Restricted

This page is intentionally left blank

Document is Restricted

This page is intentionally left blank

Document is Restricted

This page is intentionally left blank