



Grants Committee of the Bridge House Estates Board

Date: MONDAY, 26 SEPTEMBER 2022
Time: 10.00 am
Venue: COMMITTEE ROOMS, WEST WING, GUILDHALL

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

Enquiries: Joseph Anstee
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Accessing the public meeting

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

<https://youtu.be/JLEdXIbbp80>

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Lunch will be served in the Guildhall Club at 1.00pm.

**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. MINUTES

To agree the public minutes and non-public summary of the meeting held on 20 June 2022.

For Decision
(Pages 7 - 16)

4. OUTSTANDING ACTIONS*

Report of the Town Clerk

For Information
(Pages 17 - 18)

5. MANAGING DIRECTOR'S UPDATE REPORT

Report of the Managing Director of Bridge House Estates (BHE)

For Decision
(Pages 19 - 86)

6. SUPPORTING THE CHARITY SECTOR WITH INFLATION

Report of the Managing Director of BHE

For Decision
(Pages 87 - 96)

7. ALLIANCE PARTNERSHIPS UPDATE

Report of the Managing Director of BHE

For Decision
(Pages 97 - 104)

8. BHE GRANTS COMMITTEE - OFFICER DELEGATIONS

Report of the Managing Director of BHE

For Decision
(Pages 105 - 108)

Finance

9. BUDGET MONITORING REPORT

Report of the BHE & Charities Finance Director (representing the Chamberlain)

For Information
(Pages 109 - 114)

Bridging Divides - Funding Applications

10. SUMMARY OF BRIDGING DIVIDES*

To note a summary of the Bridging Divides programme.

For Information
(Pages 115 - 116)

**11. COLLABORATIVE ACTION FOR RECOVERY REQUEST FOR FUNDING
TOWARDS INFRASTRUCTURE COSTS FOR LONDON FUNDERS (19552)**

Report of the Managing Director of BHE

For Decision
(Pages 117 - 138)

**12. STRATEGIC INITIATIVE - LONDON COMMUNITIES EMERGENCIES
PARTNERSHIP (19111)**

Report of the Managing Director of BHE

For Decision
(Pages 139 - 150)

13. STRATEGIC INITIATIVE: DO IT NOW NOW CIC (19406)

Report of the Managing Director of BHE

For Decision
(Pages 151 - 188)

14. SCHOOL FOR SOCIAL ENTREPRENEURS, MATCH TRADING

Report of the Managing Director of BHE

For Decision
(Pages 189 - 194)

15. LONDON'S GIVING STRATEGIC DEVELOPMENT FUND

Report of the Managing Director of BHE

For Decision
(Pages 195 - 214)

16. GRANT FUNDING ACTIVITY: PERIOD ENDED 13 SEPTEMBER 2022

Report of the Managing Director of BHE

For Decision
(Pages 215 - 290)

Other

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

18. 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

19. NON-PUBLIC MINUTES

To agree the non-public minutes of the meeting held on 20 June 2022.

For Decision
(Pages 291 - 294)

20. UPDATE ON THE BRIDGE PROGRAMME

Report of the Managing Director of BHE

For Information
(Pages 295 - 340)

Bridging Divides - Funding Applications

21. ALLIANCE PARTNERSHIPS - COMIC RELIEF (GLOBAL MAJORITY FUND) (REF: 19551)

Report of the Managing Director of BHE

For Decision
(Pages 341 - 360)

22. PIPELINE OF STRATEGIC INITIATIVES*

Report of the Managing Director of BHE

For Information
(Pages 361 - 364)

Other

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

*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.*

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GRANTS COMMITTEE OF THE BRIDGE HOUSE ESTATES BOARD

Monday, 20 June 2022

Minutes of the meeting of the Grants Committee of the Bridge House Estates Board held at Committee Rooms, Guildhall and via Microsoft Teams on Monday, 20 June 2022 at 11.00 am

Present

Members:

Paul Martinelli (Chair)
Deputy Nighat Qureishi (Deputy Chair)
Jannat Hossain (Co-opted Member)

Officers:

David Farnsworth	- Managing Director of Bridge House Estates
Simon Latham	- BHE
Amelia Ehren	- BHE
Caspar Cech-Lucas	- City Bridge Trust, BHE
Dinah Cox	- City Bridge Trust, BHE
Clara Espinosa	- City Bridge Trust, BHE
Jenny Field	- City Bridge Trust, BHE
Samantha Grimmett-Batt	- City Bridge Trust, BHE
Sandra Jones	- City Bridge Trust, BHE
Julia Mirkin	- City Bridge Trust, BHE
Geraldine Page	- City Bridge Trust, BHE
Anne Pietsch	- Comptroller & City Solicitor's Dept.
Fiona Rawes	- City Bridge Trust, BHE
Tim Wilson	- City Bridge Trust, BHE
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

Apologies for absence were received from Alderman & Sheriff Alison Gowman, William Hoyle (Co-opted Member) and Judith Pleasance.

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

There were no declarations.

3. TERMS OF REFERENCE

RESOLVED – That the Committee receive its terms of reference, as agreed by the BHE Board at its meeting on 27 April 2022.

4. **ELECTION OF CHAIR**

The Committee proceeded to elect a Chair in accordance with Standing Order 29. Expressions of interest were sought and Paul Martinelli, being the only Member indicating their willingness to serve, was duly elected Chair of the Grants Committee of the BHE Board for the ensuing year.

The Chair thanked Members and officers for their support and for the positive work of the Committee during its first year, before inviting the Committee to look forward and outwards toward the allocation of the grants budget over the next year.

5. **ELECTION OF DEPUTY CHAIR**

The Committee proceeded to elect a Deputy Chair in accordance with Standing Order No.30. Expressions of interest were sought and Deputy Nighat Qureishi, being the only Member indicating their willingness to serve, was duly elected Deputy Chair of the BHE Board for the ensuing year. The Deputy Chair thanked Members and officers for their support.

The Chair then gave thanks to Alderman & Sheriff Alison Gowman for her support as Deputy Chair and paid tribute to her commitment to the charity across a wide range of activities.

6. **MINUTES***

RESOLVED – That the public minutes and non-public summary of the meeting held on 9 March 2022 be agreed as a correct record.

7. **OUTSTANDING ACTIONS**

The Committee received a list of outstanding actions and noted the updates provided in respect of the items listed. The Committee noted that the BHE Board would be considering the charity's principal risk register at its next meeting.

RESOLVED – That the outstanding actions list be noted.

8. **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.

Impact and Learning

The Managing Director of BHE advised that previous induction and training sessions in respect of both the main Board and the Grants Committee had been recorded and were available for Members, who were also encouraged to contact officers if they felt there was any further topics for training or Member development that would be beneficial.

Recruitment

In response to a question from a Member, the Managing Director of BHE advised that recruitment to vacancies within the CBT team had been done on a

staggered basis as vacancies had arisen due to retirements, which in turn dictated the timing of recruitment exercises. Further recruitment would be reviewed following the anticipated approval of the Supplemental Royal Charter.

Learning Visits

In response to a question from the Chair, the Managing Director of BHE advised that it was hoped to complete the trial of a new approach to learning visits in the next few weeks, following delays arising due to Covid-19, and that if successful it was hoped to undertake these visits on a wider basis following the summer recess.

The Chair then gave thanks to Lewisham Local for their feedback and partnership in the learning case study set out in the report.

RESOLVED – That the report be noted.

9. **ANCHOR PROGRAMME**

The Committee considered a report of the Managing Director of BHE requesting approval to proceed with the implementation of the Anchor Programme, a proposed new funding stream which aimed to grow stronger, more resilient communities. The Managing Director of BHE introduced the report and presented the proposals to the Committee.

In response to a question from the Deputy Chair, the Managing Director of BHE outlined the process by which the proposed allocation of £20 million had been reached, which had included a design group in conjunction with partner organisations, and how CBT would mitigate against inflationary costs. The Committee was advised that whilst the proposed allocation was not necessarily intended to bring in other funders, the funding may exercise CBT's natural leverage. The Managing Director of BHE then confirmed that grants proposed as part of the proposed would be submitted in accordance with the usual framework.

A Member commented that it was important to define what systemic change would look like within the context of the proposals. The Managing Director of BHE thanked the Member for raising this point and responded that CBT would aim to be clear on what the groups involved wanted from the programme, and that an advisory group would be in place during implementation and delivery of the programme.

The Chair then thanked Members for their comments before drawing the Committee's attention to the recommendations.

RESOLVED – That the Grants Committee of the BHE Board agree to 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.

10. **SUMMARY OF BRIDGING DIVIDES***

The Committee noted a summary of the Bridging Divides programme.

11. **STRATEGIC INITIATIVE - ACTION FOR RACE EQUALITY - WINDRUSH JUSTICE (REF: 19453)**

The Committee considered a report of the Managing Director of BHE requesting 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. The Managing Director of BHE introduced the report and presented the proposals to the Committee. In response to a question from the Chair, the Managing Director of BHE confirmed that any compensation funds recovered as part of the initiative would be directed to the individuals to whom they were due.

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

12. **STRATEGIC INITIATIVE - PLACE2BE (REF: 19322)**

The Committee considered a report of the Managing Director of BHE requesting 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. The Managing Director of BHE introduced the report and presented the proposal to the Committee.

In response to questions from Members, the Managing Director of BHE advised that the grant funding would be available to all London schools within the Place2Be network from September 2022, which would facilitate a large number of interventions. The Committee noted that Place2Be worked with nearly 500 schools nationally. The Chair commented that he had previously visited the organisation, who were doing really positive work. With regards to assessing outcomes, the Managing Director of BHE advised that this was undertaken through an evaluation process at the end of the intervention. The Managing Director of BHE then advised that officers received regular updates from the organisation, and that these and other materials could be shared with Members.

RESOLVED – That the Grants Committee of the BHE Board 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.

13. **ALLIANCE PARTNERSHIPS - LONDON LEGAL SUPPORT TRUST, ADVISE SKILLS DEVELOPMENT (REF: 19437)**

The Committee considered a report of the Managing Director of BHE requesting 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). The Committee noted that the grant, if endorsed, would be referred to the BHE Board for approval. The Managing Director of BHE introduced the report and presented the proposal to the Committee.

In response to a question from the Chair, the Managing Director of BHE advised that legal support was not a statutory provision for local authorities except in respect of some care and homelessness related provisions, and average provision had declined in recent years in line with increasing budgetary constraints. The Managing Director of BHE confirmed that grant funding would not be replacing statutory funding, and this grant would be used towards remediating the skills gap within the sector with a view to making it more sustainable. Members commented that the replacement of funding previously provided by local or central government was of some concern, but noted that the proposals related to a vital part of the sector. The Managing Director of BHE then outlined how the grant would be used towards the ability to quantify outcomes and measure the quality of delivery.

A Member noted that 16% of the grant was designated for administrative costs, and suggested increasing the overall allocation to £6 million, with any underspend to be returned if necessary. The Managing Director of BHE advised that there was no administrative barrier, or immediately risks, to increasing the overall grant, adding that £5 million was the minimum amount required to achieve the desired impact, with it hoped that a grant from CBT would leverage further funding. The Managing Director of BHE confirmed that there was no risk of the funding being lost, and that officers could take the suggestion of a larger grant away to be assessed, as there was sufficient budget in place to consider it.

The Managing Director of BHE advised that the Committee could agree to recommend the £5 million as a minimum level of funding, and instruct officers to assess the implications of agreeing a larger overall grant ahead of the BHE Board's consideration of the matter. The Chair endorsed this suggestion, and proposed that the Committee agree to recommend the grant to the BHE Board with a minimum allocation of £5 million, with authority delegated to the Chair and Deputy Chair to consider the recommendation of additional funding to the BHE Board once this had been assessed, and this was agreed.

RESOLVED – That the Grants Committee of the BHE Board:

- i) Endorse to the BHE Board a grant of at least £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; and

- ii) Delegate authority to the Chair and Deputy Chair, to consider the recommendation to the BHE Board of any additional funding above £5 million, should this be supported by officers.

14. THE CORNERSTONE FUND ROUND 2

The Committee received a report of the Managing Director of BHE presenting the second round of the Cornerstone Fund, with five Stage 2 bids presented in subsequent reports. The Managing Director of BHE introduced the report, outlining the history of the Cornerstone Fund for context and setting out the distinctions between the Cornerstone Fund and other funding streams such as the Anchor Programme. The Chair then drew the Committee's attention to the grant applications set out following the report.

RESOLVED – That the report be noted.

a) London Youth (REF: 19238)

The Committee considered a Cornerstone Fund application in respect of London Youth (Ref: 19238). In response to a comment from the Chair, the Managing Director of BHE advised the phrase 'game-changing' had been carried over having been part of the application, but this could be tweaked if Members felt it was unhelpful. The Chair commented that this was a good proposal which he hoped could deliver.

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

b) Bridge Renewal Trust (REF: 19150)

The Committee considered a Cornerstone Fund application in respect of The Bridge Renewal Trust (Ref: 19150). In response to a question from a Member, the Managing Director of BHE assured the Committee that many organisations were under their reserves targets following Covid-19, and that The Bridge Renewal Trust had an ambitious target. The Managing Director of BHE added that officers had undertaken their usual assessments and would have flagged any significant concerns had they been raised.

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

c) Africa Advocacy Foundation (REF: 19267)

The Committee considered a Cornerstone Fund application in respect of Africa Advocacy Foundation (Ref: 19267). The Managing Director of BHE introduced the application and gave the Committee further detail on the proposal. In response to a question from the Deputy Chair, the Managing Director of BHE advised that the organisation were planning to increase their cashflow in order to operate at a higher level, in response to an increasing demand for their services.

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

d) **AdviceUK (REF: 19250)**

The Committee considered a Cornerstone Fund application in respect of AdviceUK (Ref: 19250)

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

e) **Global Black Thrive (REF: 19237)**

The Committee considered a Cornerstone Fund application in respect of Global Black Thrive (Ref: 19237). In response to a question from the Chair, the Managing Director of BHE advised that further changes to the strategic partnership of organisations were not anticipated. The Managing Director of BHE confirmed that the project had previously received a development grant and that officers were comfortable that the project was moving in the right direction, having undertaken a thorough assessment.

RESOLVED – That the Grants Committee of the BHE Board approve a grant of £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.

15. **GRANT FUNDING ACTIVITY: PERIOD ENDED 6 JUNE 2022**

The Committee considered a report of the Managing Director of BHE providing details of funds approved and rejected under delegated authority since the last meeting of the Grants Committee, grant variations that had been approved under delegated authority, and seeking the Committee’s approval for 1 grant rejection. The Managing Director of BHE introduced the report and drew Members’ attention to the key points. In response to a question from a Member, the Managing Director of BHE advised that the funding application from the Stationers’ Hall Charity had not proceeded to full assessment, and had been ineligible due to CBT’s policy not to fund capital works retrospectively.

The Chair then drew the Committee’s attention to the financial information provided. Noting a comment made as part of impact and learning feedback from funded organisations about overpayment causing tax concerns, the Managing Director of BHE advised that this had arisen as the organisation had mistakenly received a modest overpayment in their first year as a result of human error, which had carried tax implications due to the organisation’s

structure as a Community Interest Company (CIC). The Managing Director of BHE confirmed that steps had been taken to rectify the error and officers had been reminded to double-check payment schedules prior to authorisation.

RESOLVED – That the Grants Committee of the BHE Board:

- i) Receive the report and note its contents; and
- ii) Approve the rejection of the grant application from Agudas Israel Community Service (AICS) (Ref: 19135).

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

There was no other business.

17. 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.

18. NON-PUBLIC MINUTES

RESOLVED – That the non-public minutes of the meeting held on 9 March 2022 be agreed as a correct record.

19. BRIDGING DIVIDES: RESPONSIVE GRANT PROGRAMMES

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

20. PIPELINE OF STRATEGIC INITIATIVES*

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

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

The Committee received a report of the Town Clerk.

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

There was other business.

The meeting ended at 12.40 pm

Chair

Contact Officer: Joseph Anstee
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The Grants Committee of the Bridge House Estates Board – 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	Review CBT Risk Register, particularly the 'Brexit' risk which had previously been removed.	Scott Nixon	June 2022	-	September 2022: A review of the BHE Principal risks has been completed and signed off by the BHE Board in September 2022. The CBT operational risks will be further reviewed by Officers in October 2022 and will presented to the next BHE Grants Committee for their review and comment.	

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Committee: Grants Committee of the Bridge House Estates Board	Date 26 September 2022
Subject: BHE Managing Director's Update Report	Public
Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> 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 Decision

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: Bridging Divides funding updates relating to expected grant spend, the Cornerstone Fund, Risk and Grant Recommendations, LocalMotion, the Anchor Programme, Alliance Partnerships, Levelling Up Report, Impact Investing for the Capital, the Bridge Programme. The report also provides updates on Philanthropy, Communications and Events, and Impact and Learning workstreams.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Note the contents of the report; and
- ii) Agree to allocate £1,823,019 from the Bridging Divides designated grant fund for 2022/23 to the Cornerstone Fund.

Main Report

Bridging Divides Funding Updates

1. Expected Grant Spend in 2022/23 - At Agenda Item 9 the Budget Monitoring report is presented. This includes the current expected total grant spend for the year, which has been significantly reduced when compared to the original budget that the Grants Committee received in December 2021. Since then, a reforecast was circulated to the Committee by email, which explained that the expected spend had reduced, and indicated that further revisions would likely be required following further programme development. The reduction in expected spend is due primarily to the time it has taken to develop the collaborative Anchor and CAR funding programmes. A fuller explanation of the reduction is provided at **Appendix 1**.
2. Cornerstone Fund Round Two - The Cornerstone Fund (Cornerstone) was originally devised in October 2016, with the former CBT Committee approving an allocation of £3m to assist in the strategic development of infrastructure support for

London's civil society, by funding partnership work between civil society infrastructure organisations. Round 1 was launched in April 2018, as part of the overall Bridging Divides funding strategy, and Round 2 in April 2021. The continuation of Cornerstone (Round 2) was supported by the former CBT Committee in their endorsement of the recommendations of the Interim Review of Bridging Divides. Cornerstone is a collaborative initiative, bringing together funders (namely CBT, Trust for London (TL) and the National Lottery Community Fund (NLCF)) and civil society support organisations and their partners with the aim of to bring about systemic change and enabling civil society support organisations to collaborate to achieve the goals of a: thriving civil society that is adaptable, resilient, collaborative, sustainable and driven my communities.

3. All of the Round 2 applications have now been assessed, barring one which is awaiting a decision under Delegated Authority. TL contributed £500,000 over 3 years to Cornerstone (both rounds) as a restricted grant towards this programme with the NLCF also taking part by awarding 2 of the Stage 2 grants using its own funding procedures. The table below outlines the Round 2 funding awarded.

4. Sufficient resource has been allowed in the 2022/23 grants budget for the funding of Cornerstone, and the continuation of Cornerstone was endorsed by the former CBT Committee. However, a note seeking Grants Committee approval to officially allocate c£2m to Cornerstone round 2 was omitted from the March 2022 MD report in error, due primarily to the departure of two senior funding staff. Officers apologise for this and, whilst it is an essentially administrative error, in the interests of good governance, the Grants Committee's approval is now sought retrospectively to allocate £1,823,019 of the agreed 2022/23 grants budget to Cornerstone.

Income	
Cornerstone Fund - brought forward 01/04/2022	£95,291
Trust for London - final instalment of £500,000 over 3 years	£100,000
Total	£195,291
Expenditure	
Learning Partner	(£33,050)
Grants approved between April and August 2022	(£1,985,260)
Total	(£ 2,018,310)
Total to be allocated from BD Designated Grant Fund	(£1,823,019)

5. Risk and Grant Recommendations - Thoughtful consideration of risk (in relation to applicant organisations and their projects) is central to good grant-making and covers a range of issues including equity, delivery models, likelihood of achieving proposed impact and financial management. Following the suggestion of the Chair of the Grants Committee, officers are developing a summary guide to sit at the front

of each grant recommendation report, highlighting issues of note. This is likely to include whether the organisation's leadership is reflective of the communities it serves, whether the expected approach is innovative (or 'tried and tested') and whether there are any specific financial issues. A proposal is intended for the Grants Committee's December meeting and, if approved, this will be trialled on future grant recommendation reports for feedback and improvement.

6. LocalMotion - 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. Following recent work on the communications and branding, the [official website](#) launched in July. It has also recently been agreed that CBT will provide Bridge Programme access (capacity building support) to core group members of the LocalMotion place based in London (Enfield), mirroring other involved funders which will also be providing their own "funder plus" support to LocalMotion core group members. The next learning summit is taking place in Lincoln on 1st November 2022.
7. Anchor Programme - Following the Grants Committee's endorsement of a £20m allocation from the designated grants fund in June 2022, progress on the Anchor programme continues. The programme aims to support anchor voluntary sector organisations to deliver systemic change by supporting their ongoing sustainability long-term. The usual City Corporation procurement process was used to recruit a learning partner, The Social Innovation Partnership (TSIP), which were also the facilitators for the Design Group (the group of sector organisations providing advice to CBT on the design and delivery of the fund). Due to TSIP's other commitments and delays during the procurement process the work will now start in earnest in October with the establishment of an Advisory Group of voluntary and community sector organisations, mostly with an equity focus (focused on communities facing the most barriers). The group will then work with officers to finalise the criteria and priorities, to support the launch of the first round of funding in Autumn.
8. Alliance Partnerships - On 6 July, the [Racial Justice Fund](#) and [Disability Justice Fund](#) launched, which are CBT Alliance Partnerships with Trust for London distributing a total of £7m in the Capital. CBT contributed a total of £2m towards the Racial Justice Fund and £1.5m towards the Disability Justice Fund.
9. Levelling Up Report - On 29 June, Centre for London released phase one of its [Levelling Up Report](#), which was funded by both CBT and the City of London Corporation. The launch event was attended by Alderman and Sheriff Gowman and CBT officers. The report sets out what London's Levelling Up needs are, how Londoners are affected by the Levelling Up agenda, and the challenge of getting a hearing for these issues.
10. Impact Investing for the Capital - BHE have been co-sponsor to Centre for London's ["In London and for London: Impact Investing for the Capital"](#). This research looks at the role impact investment could play to address London's challenges over the coming years. Key findings include: the importance of early stage, catalytic capital for projects with high potential impact but lower potential financial returns; the value of investment readiness grants and blended finance;

the need for an explicit equity focus to tackle bias and discrimination in the market. The report is expected to be published in mid-November.

11. Bridge Programme - An update report is included on today's agenda on the Bridge Programme and proposed next steps.

Philanthropy

12. The joint BHE and City Corporation Philanthropy Strategy aims, to support and raise awareness of high quality giving in the capital. Long-term support for place-based giving schemes through the London's Giving strategic initiative is a key part of this work, with £7m having been earmarked to further support the work of London's Giving and place-based giving schemes in September 2021.
13. In addition to the careful stewardship of the resulting funding bids from various Giving Schemes, five of which are included for discussion on today's agenda, there has also been significant work undertaken by externally commissioned bodies to shape thinking around a potential Resource Hub for London's Giving, and to scope the merits or otherwise of promoting a challenge/Match Fund to enable local schemes to leverage funding from new donors. The conclusions of these research exercises will be presented to the December Grants Committee meeting.
14. More broadly, the Corporate Volunteering Manager has played a key role, supported by the Philanthropy Director, in the recruitment, training and mobilisation of Royal Event Supporters from across the City Corporation. These RES have operated with consummate professionalism to support stewardship of the public at City-based events both for the Jubilee, and for the Service of Reflection at St Paul's Cathedral and the Proclamation of the King at the Royal Exchange, following the announcement of the death of Her Majesty the late Queen Elizabeth II.

Communications and Events

15. Media Coverage – Since the last Grants Committee meeting on 20 June there have been 97 items of media coverage referencing City Bridge Trust and other City Corporation charitable giving. This included a feature-length article on Bridge House Estates by Giles Shilson in *Fundraising.co.uk*, coverage in the *Daily Mirror* and *My London* of a grant to the Barnet Foodshare scheme and television coverage of a grant to music charity Joy of Sound on *London Live*.

Impact and Learning

16. End of Year 4 Bridging Divides Review - Renaisi have completed their review of CBT's progress during year 4 of the Bridging Divides period (April 21 – March 22). The full report is attached for information at **Appendix 2**. The aims of the review were informed by the CBT Management Team and Chairs of the BHE committee and BHE Grants committee. These were:
 - a. The impact that CBT funding and non-financial support has had on funded organisations over the last twelve months
 - b. A temperature check of CBT team views on the progress made towards becoming a learning and values-led team – to build on team consultations in previous mid- and end-of-year reviews.

17. Methods included:

- a. A team survey completed by 41 of the 55 CBT staff members (approximately 75%). This is almost double the response rate achieved in previous mid- and end-of-year reviews;
- b. A survey completed by 167 funded organisations;
- c. Six interviews with funded organisations, of varying size from four grant programmes; and
- d. Regular conversations with the Heads of Impact and Learning

18. Overall, CBT has played an important role for funded organisations through building trust, maintaining open communication, and being flexible. Such ways of working, alongside funding, have enabled organisations to adapt and continue their services in the face of the pandemic. However, responses show both funding and accessible Funder Plus support remain essential for funded organisations.

19. Responses to the staff survey suggest satisfaction with the progress CBT is making towards being values-led and praised working groups for helping push values up the agenda. There is still room for improvement before CBT is truly values-led.

20. Responses over 3 years show a marked improvement in staff members' perception of the learning ethos at CBT, with progress in all areas, particularly internal sharing of learning. Sharing of learning externally shows the greatest perceived improvement over time and more progress still to make.

21. Learning Visits - Thank you to Members and Co-opted Members of the BHE Grants Committee who contributed time and feedback to a trial of Learning Visits with CBT funded organisations between March and July. Feedback included:

*“Visits [...allow] us to understand how some of the **macro changes** happening around us are **impacting the work of organisations** in specific sectors.”*

Co-opted Member of the BHE Grants Committee

*“Julia Mirkin has always worked hard to establish a balanced relationship with us and we have a good solid, mutually respectful relationship. This visit was no different. **This type of relationship engenders trust, honesty and collaborative working. This is a lesson for other funders.**”*

Funded Organisation

22. The learning has informed a new approach which the Impact and Learning team are implementing. Officers believe the new approach will create useful learning for all stakeholders, support trusting relationships, help the ongoing journey to balance power between CBT and funded organisations, bring to life intangible benefits of funding, and enable CBT to role model for other funders.

23. In the coming weeks, the Grants Committee will be asked to complete a short survey with their availability, areas of interest and skills to share, which officers will use to match them to a suitable learning visit from November 2022 onward. There will be pre-visit briefings and debriefs.

24. Research Update - CBT commissioned Lancaster University and the Work Foundation to conduct independent research to explore hybrid working for disabled people. There are a number of enduring structural barriers and disadvantages to disabled people accessing and thriving within the labour market. There is much evidence for this but the area is not widely researched. However, government has a goal to see one million more disabled people in work between 2017 and 2027 and mainstreaming hybrid working is an area of much debate post-pandemic. With inflationary pressures, the needs for hybrid working may shift again.
25. The research consisted of a large national survey of disabled people in employment, interviews with disabled people and 2 policy roundtables of employers and support/advice organisations respectively. A Research Advisory Group of independent experts within the field of disability was attached to the research from design to delivery.
26. The [final research report](#) was published on 11 July and a panel launch event was held on 19 July, with Grants Committee Chair Paul Martinelli providing the keynote speech. Shani Dhanda, Disability Specialist & Accessibility Consultant, who was on the panel, described the research as “ground-breaking”.
27. The research found that the majority of disabled workers who took part in the research valued the opportunity to decide where they worked, and this had positive impacts for them and their organisation. There were clear benefits to working from home, including having more control, autonomy and better able to manage health and wellbeing.
28. However, of all survey respondents who requested additional support or new adjustments while working remotely, close to 1 in 5 (19.1%) had their request refused. Many interviewees pointed out that although they had access to specialist equipment and software, they had purchased this themselves, using their own money.
29. Recommendations for employers included investing in training and support for line managers, explore wider forms of staff flexibility and ensure Workplace Adjustment Passports for all. Recommendations for government included making flexible working the default position for all employees, require large employers to publish information on their approach to flexible and hybrid working, increase funding for the Equalities and Human Rights Commission to enforce and protect disabled workers’ rights, reform Access to Work and refresh the Disability Confident scheme.
30. The researchers also produced an internal-facing research report setting out a series of specific recommendations for CBT and BHE in terms of future policy and practice, including:
 - a. To work with London’s disabled people’s organisations and charities to embed inclusive practices and develop a strong pipeline of potential grantees.
 - b. Facilitate sharing best practice among existing grantees.
 - c. Embedding inclusive employment practices within CBT and BHE.

31. The researchers are discussing the findings with the Department for Work and Pensions (Employers Health and Inclusive Employment team), the department for Business Energy and Industrial Strategy, and the Cabinet Office's Disability Unit.
32. A CBT staff lunch and learn session to debate the policy and practice recommendations set out in the report is scheduled for 21 September. Saida Bello, Director of Equality, Diversity and Inclusion at the City Corporation will be attending.
33. Learning Case Study – A CBT learning case study is provided at **Appendix 3**. The case study is about Hopscotch Women's Centre, a user-led organisation providing culturally appropriate support for "easy to ignore" women from racialised communities experiencing abuse and/or social exclusion.

Conclusion

34. This report provides a high-level summary of CBT activities since the Grants Committee last met in June 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 – 2022/23 Expected Grants Spend
- Appendix 2 - City Bridge Trust: Annual Review of Bridging Divides, Year Four, 2021/22
- Appendix 3 - Learning Case Study: Hopscotch Women's Centre

David Farnsworth

Managing Director of Bridge House Estates

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Updated forecast grants spend 2022-2028 produced 26.08.2022, Sam Grimmett Batt, Funding Director

1. Summary

Funding area	Original budget Dec 21	Forecast @ Mar 22			Revision Aug 22			Forecast @ Mar 22			Revision Aug 22			Forecast @ Mar 22 (no revision)		
		22/23 £m	Variance	23/24 £m	Variance	24/25 £m	Variance	25/26 £m	26/27 £m	27/28 £m						
Bridging Divides (BD) responsive grantmaking	28.6	28.6	29.8	1.2	30.0	30.0	0.0	39.0	39.0	0.0	39.0	39.0	39.0			
Future BD responsive grantmaking	0.0	1.0	1.0	0.0	6.3	6.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Bridge Programme	0.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	0.0	1.0	1.0	1.0			
Transition funding	13.4	2.0	1.1	-1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Cornerstone additional funding	1.0	1.0	2.5	1.5	1.0	0.0	-1.0	0.0	0.0	0.0	0.0	0.0	0.0			
London's Giving	5.3	5.3	3.5	-1.8	1.8	3.5	1.7	0.0	0.0	0.0	0.0	0.0	0.0			
LocalMotion	0.0	0.0	0.0	0.0	5.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Alliance Partnerships	10.3	10.3	9.8	-0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Every Voice Counts launch grants	0.0	0.0	0.0	0.0	5.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Collaborative Action for Recovery (CAR)	25.0	20.0	6.3	-13.7	10.0	23.7	13.7	0.0	0.0	0.0	0.0	0.0	0.0			
Anchor Programme	8.0	8.0	0.5	-7.5	8.0	8.5	0.5	3.7	11.1	7.4	0.0	0.0	0.0			
Responding to resilience risk (RRR2)	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Bridge to Work	0.1	0.1	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0			
Test&Discover Social Investment	4.0	2.0	0.0	-2.0	10.0	12.0	2.0	8.0	8.0	0.0	0.0	0.0	0.0			
Test & Discover grants	6.0	3.8	0.0	-3.8	12.5	12.0	-0.5	18.5	22.3	3.8	4.2	0.0	0.0			
Funding via delegates	0.0	0.0	0.0	0.0	20.0	20.0	0.0	6.0	6.0	0.0	0.0	0.0	0.0			
TOTAL SPEND	101.8	83.1	55.6	-27.5	110.5	126.9	16.4	76.2	87.4	11.2	44.2	40.0	40.0			

2. Budget revision – detail

As a reminder, the uplift in funds will primarily be spent between 2022 and 2025, with the majority of expenditure taking place in 22/23, 23/24 and 24/25 and a small amount extending up to 25/26 including to cover ongoing monitoring and evaluation of grants awarded. This spread ensures that funding is distributed sustainably, deliberately, and without creating an unnecessarily high administrative burden for BHE.

As communicated in MD reports throughout 22/23, some expenditure from 22/23 has been moved to 23/24 due primarily to further development work on the CAR and Anchor grant programmes. In total £27.5m of planned expenditure has been transferred to 23/24 and 24/25 since the last update in March. When the plans were originally formulated much of the detail of the operationalisation of the various streams was unknown and as such it was difficult to estimate what might be possible in terms of expenditure. As plans for the Anchor Programme have become more developed, it became

clear that further preparatory work was required before launching for applications, not least to ensure appropriate consultation with the wider sector. The amount allocated for Anchor Programme in 22/23 has therefore reduced with the majority moved to 23/24 (the overall allocation remains the same, with some expenditure in 24/25 too).

The amount allocated for CAR in 22/23 has also reduced, as it has taken longer to build the strategic, comms and funding plans and appoint the learning and tech partner than originally envisaged. The launch plans are however now well underway and the full £30m is currently planned to be distributed by the end of the 23/24 financial year.

The Social Investment “test and discover” element has reduced as the royal charter was granted later in the year than hoped; work will be contingent on BHE Board’s approval of a proposed new approach in alignment with recommendations from the BHE Investment Working Group.

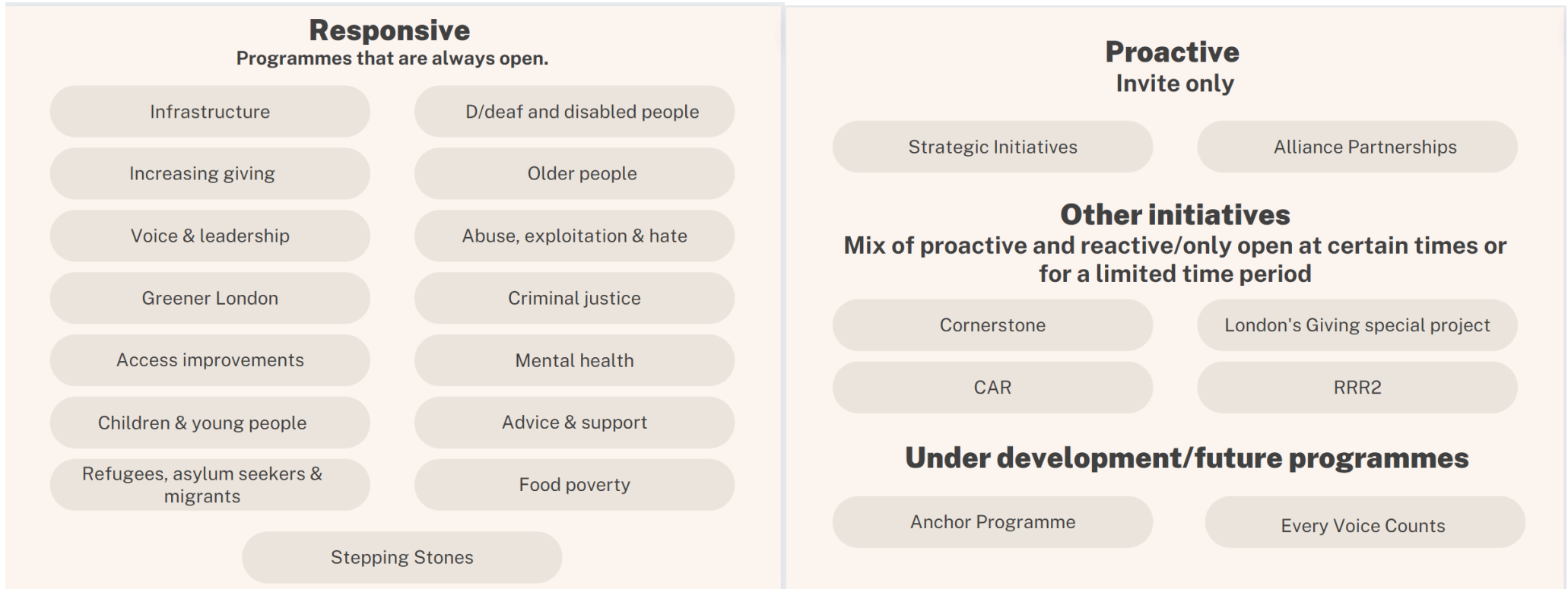
Finally, the “test and discover” (grants) element (which represents work as yet undeveloped) has reduced as there is currently limited capacity within the funding team to work on any additional developmental streams. Once some of the current developmental streams have been resourced sufficiently (such as Anchor Programme), and some developmental work is complete, resource will be unlocked for this.

Further planning and developmental work for grant spend activity in 23/24 is pending, the outcome of which is likely to impact timelines in that year further. This means that the total for 23/24 is likely to ultimately be lower than £127m as shown in the August revision above (spreading more evenly across 23/24 and 24/25). Before October (when the initial 23/24 onward grants spend forecast will be finalised) the Funding Directors will formulate a more realistic estimate for spend in 23/24.

Note, this table assumes that in addition to the spending of the uplift, the annual grant allocation would increase to £40m per year from 2024/25, in line with the 5 year Financial Plan presented to the BHE Board at their 16 February 2022 meeting; any changes to this potential allocation, which is yet to be approved, would result in a reduction to the planned spending across responsive grant making but would not impact the wider spending plan.

The planned expenditure indicated above phasing is factored into BHE cash planning as part of the regular updates to the BHE cashflow and review of cash requirements for the charity. The information is input into the cashflow based on the expected timing of the payments of planned commitments.

3. Funding Programmes/budget lines – Summary



4. Funding Programmes/budget lines – Detail

Budget line	Notes
BD responsive grants	Fourteen responsive programmes plus strategic initiatives. Agreed in 2018, extended in 2021 and substantially revised in 2022. More info.
Future BD responsive grant programme	Every Voice Counts: programme to replace the current “voice & leadership” strand in 23/24. To be developed with learning from anchor and other uplift activity. Agreed in recommendations and implementation of Interim Review of Bridging Divides (IRBD). Endorsed by Grants Committee in 2021 & 2022.
Bridge Programme	CBT’s “funder plus” pilot. A paper with an update will be taken to Grants Committee (GC) in Sept 2022. More info.
Transition funding	(closed) Transitional funding during the implementation of IRBD. GC notified in MD reports and email in 22.
Cornerstone additional funding	Funding collaborations between capacity builders. Final expenditure planned for Cornerstone. Previous cornerstone funding agreed – top-up funding paper seeking further allocation missed from earlier GC in error; retrospective agreement to be sought Sept 22. More info.
London's Giving	A programme for place based giving (PBG) in addition to our usual PBG grants. Agreed continuation in recommendations from IRBD. Update provided March 2022 Grants Committee. More info here and here .
LocalMotion	Collaboration between six major funders in six places across the country. Further funding subject to successful second phase and GC approval in late 2023. More info.
Alliance Partnerships	Adding to other funders' programmes to augment and add value. Agreed in Dec 2021.
Every Voice Counts launch grants	Potential one-off grants to support the launch of a new strand of funding (which was a recommendation of the Interim review). Presented as part of implementation paper March 2022.
CAR	Funder collaboration co-ordinated by London Funder (LCRF V2). Onward grants only. Agreed in March 2022.
Anchor Programme	Co-designed programme to provide long term funding to anchor organisations in London. Agreed in principle in recommendations from IBDR, further endorsed at March and June 2022 GCs.
RRR2	Phase two of an initiative investigating methods for supporting frontline workers in voluntary sector. Agreed 2020.
Bridge to Work	Final expenditure on this programme supporting employment outcomes for disabled people. Agreed 2018. Recommendations from learning incorporated into responsive programmes in March 2022. More info.
Test & Discover - Social Investment	Potential programme utilising uplift funds to augment social investment work. Subject to Grants Committee approval once main social investment fund finalised.
Test & Discover - grants	Uplift funds currently unallocated. To be explored with Members in 2023 once officer capacity increases.
Alliance part two/ funding via delegates	Onward grantmaking to less well-established funders with a strong track record in their area of expertise and specialist reach and knowledge. To be informed by Anchor and Alliance Partnerships learning. Responding to recommendations of IBDR relating to the establishment of Anchor and utilising to inform further funding. Subject to Grants Committee approval following the implementation of the Anchor Programme. More info.

City Bridge Trust: Annual Review of Bridging Divides

Year Four, 2021-22

Mylene Pacot, Ollie Brown, John Williams, Emily Cowles-Naja and Molly Calland

September 2022



Contents

- Background and purpose of this review
- Methodology
- Reflections
- Findings
- CBT Team: Experiences of Year 4
- Embedding values and learning: conclusions and recommendations
- The Impact of CBT support on funded organisations
- Conclusions and recommendations

Background and purpose of this review

The scope of this year's annual review was developed in close consultation with the senior leadership team at City Bridge Trust in early 2022. This led to the identification of two key areas of focus:

1. The **impact that CBT funding and non-financial support** has had on funded organisations over the last twelve months
2. A **temperature check of CBT team views** on the progress made towards becoming a **learning and values-led team** – to build on team consultations in previous mid- and end-of-year reviews.

Context

Throughout 2021 and early 2022, CBT has moved from its immediate response to the Covid-19 pandemic to implementing broader, more long-term plans for post-pandemic recovery. In the same period, many funded organisations have adapted their services as lockdown restrictions and social distancing guidelines were eased. Against this backdrop, it was agreed that surveying funded organisations would provide insights into the impact funded organisations have achieved in a period of continuing uncertainty, and how CBT can improve the support it offers the organisations it funds.

CBT regularly seeks feedback from funded organisations and shares findings across its team. However, it was agreed that a Renaisi-led consultation could lead to more open responses from funded organisations on the impact of funding received and the support offered by CBT.

Renaisi completed a similar consultation exercise in 2019, when it sought to understand funded organisations' perceptions of CBT's monitoring and evaluation practices. Insights from this exercise are referred to in this review.

Methodology



This review has been informed by the following research activities:

- **A team survey** completed by **41** of the 55 CBT staff members (approximately 75%), to gauge staff views on progress made towards becoming a learning and values-led team.
- This is **almost double** the response rate achieved in previous mid- and end-of-year reviews.
- A survey completed by **167 funded organisations**, which asked questions relating to organisations' funding outcomes, the impact of CBT support, and how this support could be improved in the future. **Six interviews** with **funded organisations**. We interviewed organisations of varying size from four grant programmes (Advice and Support, Connecting the Capital, Positive Transitions, and Small Grants), addressing four different areas of need (Disabled people, Infrastructure, Migrants, and Mental Health).
- Regular **conversations** with the **co-Heads of Impact and Learning**.

Both our CBT team and funded organisation surveys were anonymous to encourage respondents to offer honest reflections of their experiences.

Weighted scores for agreement statements

- In analysing responses to both the CBT team and funded organisations surveys, we have calculated a weighted score for each 'agreement statement'. 'Agreement statements' are statements included in a survey for which the respondent is asked to rate their level of agreement, from strongly agree to strongly disagree. Calculating a weighted score by assigning a numerical value to each answer enables easy comparison between the levels of agreement with different statements.
- 'Strongly agree' has a weighting of 5, while 'Strongly disagree' has a weighting of 1. Therefore, higher weighted scores (tending towards 5) indicate stronger levels of agreement, while lower weighted scores (tending towards 1) indicate lower levels of agreement.

Survey answer	Weighted score
Strongly agree	5
Agree	4
Neither agree nor disagree	3
Disagree	2
Strongly disagree	1

Reflections

Surveying the CBT team on learning and values

- This year's CBT team survey was completed by **almost three-quarters of the CBT team** – a much higher response rate than in previous mid- and end-of-year reviews. As a result, this year's survey provides a **more representative picture** of the views of the CBT team.
- This higher response rate was achieved by:
 - Ensuring that the survey was **clearly presented and worded** so that it was straightforward to complete.
 - A **more pro-active and coordinated approach to follow-up**, led by the Impact and Learning team. The Impact and Learning Officer attended team meetings to encourage colleagues to complete the survey and sent out regular reminders to team managers asking them to follow-up with their teams. Staff members were also encouraged to complete the surveys at weekly 'stand ups' and by their line managers. This regular and proactive engagement appears to have been particularly effective in encouraging more members of the team to complete the survey.

Reflections

Exploring the impact of CBT funding and support

- As part of this review, we interviewed **six funded organisations**. When recruiting interviewees, we worked with the Impact and Learning team to identify organisations of different sizes from a range of funding streams and cause areas. While we were successful in doing so, findings from these interviews should **not be treated as representative** of all funded organisations due to the small sample size and risk of sampling bias – organisations that agreed to be interviewed were more likely to have had a positive experience of receiving funding from CBT.
- In 2019, our survey of funded organisations had a different focus: funded organisation's perception of CBT's approach to impact and learning. As a result, **this review does not make a direct comparison with the results from the 2019 survey**.
- We analysed the responses to our funded organisations survey by size of organisation, target group, area of need, funding stream and size and length of funding received from CBT. However, **we did not see consistent differences in responses across these characteristics**.
- CBT also collects data internally on their impact on funded organisations. **Many of the findings** in this report **align with CBT's internal data**, as mapped in Appendix.

CBT Team: Experiences of Year 4

Progress towards CBT values

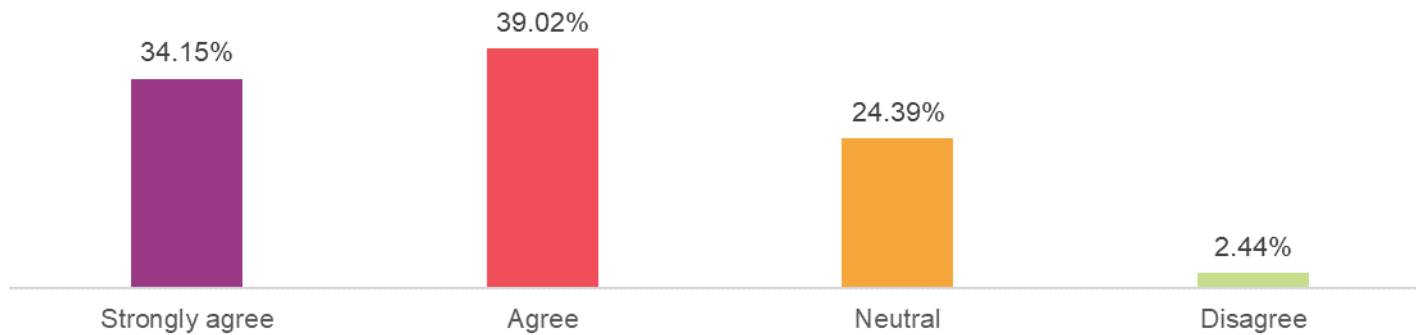
Summary of findings

Progress towards CBT values

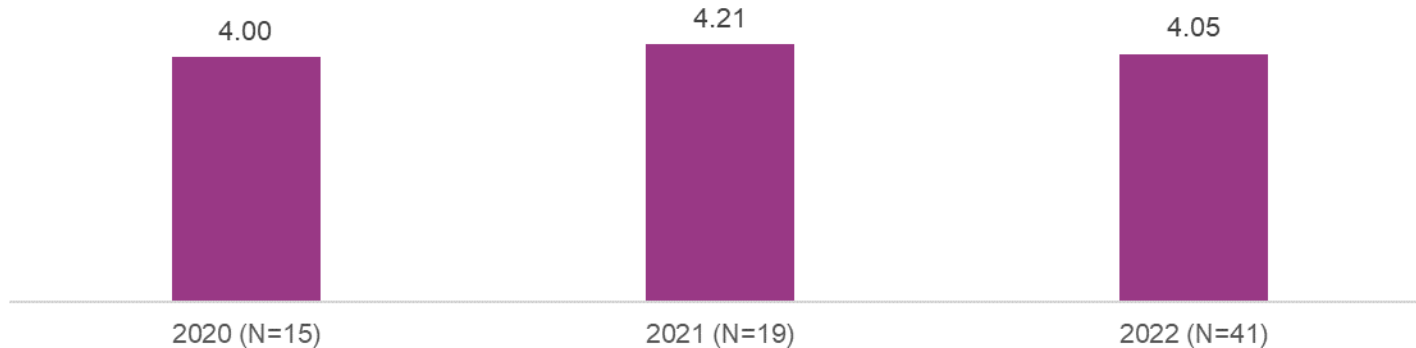
- Staff responses to the survey suggest that **CBT is making good progress towards embedding its six values across its work**. Working towards becoming a values-led funder continues to be a motivating factor for a large proportion of the CBT team.
- **Staff recognised and were satisfied with the progress that had been made so far**. Members of the team **praised the working groups** that have pushed different values further up the agenda and efforts to work collaboratively with other organisations, particularly the dedication to implementing inclusive and progressive practices.
- However, **staff also recognised that there was still progress to be made on the journey to becoming a values-led team**. It was felt that more work was needed to ensure that values became a central aspect of all of CBT's work. Some members of the team suggested that more progress has been made on some values than others, and that different teams within CBT were at different stages of embedding and embodying its values.

CBT values and staff motivation

To what extent do you agree with the following statement, 'The fact that City Bridge Trust is working towards becoming a values-based funder motivates me in my role' (N=41)



To what extent do you agree with the following statement, 'The fact that City Bridge Trust is working towards becoming a values-based funder motivates me in my role'¹

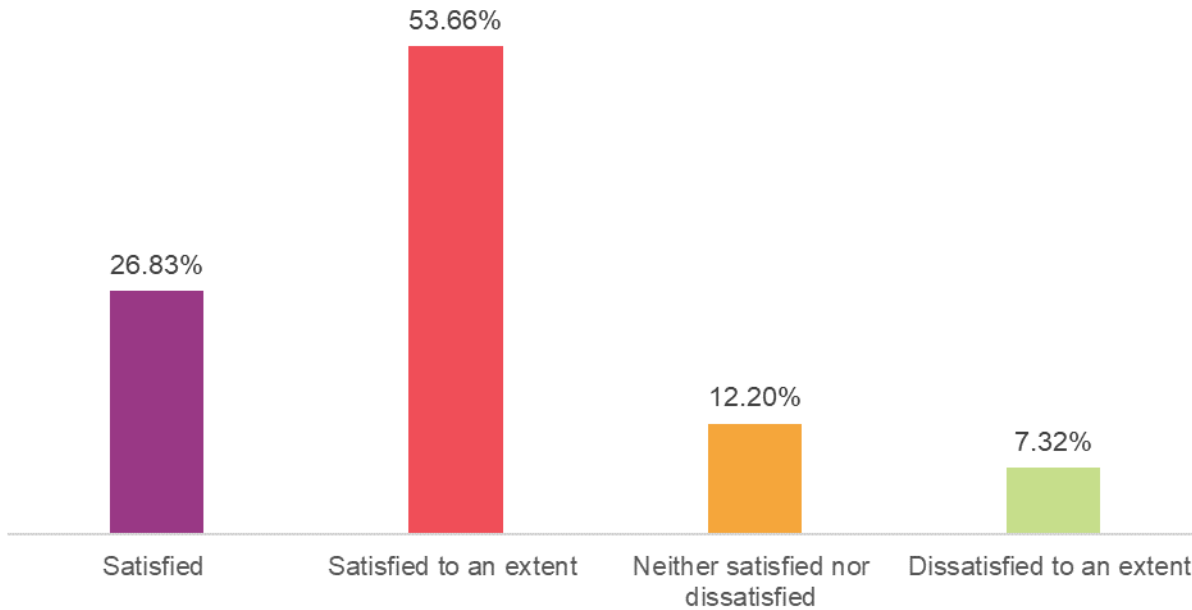


- The majority of staff (**73%**) **agreed that they were motivated in their role** by CBT working towards being a values-based funder.
- Levels of agreement with this statement **have been consistently high since 2020**, suggesting that this continues to be an important motivating factor for CBT staff.
- When promoting new initiatives or looking for ways to motivate staff, CBT should consider how these initiatives can be aligned with its values.

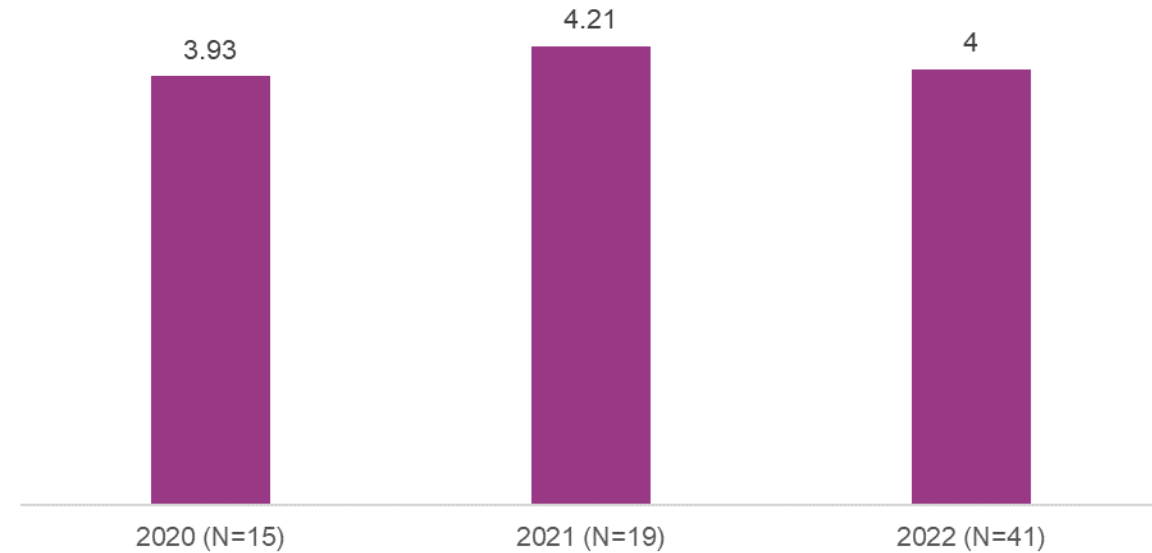
¹ See slide 5 for an explanation of the weighted scores used here

Satisfaction with CBT's progress towards living its values

How satisfied are you with the progress CBT's work is making towards living our values? (N=41)



How satisfied are you with the progress CBT's work is making towards living our values?¹



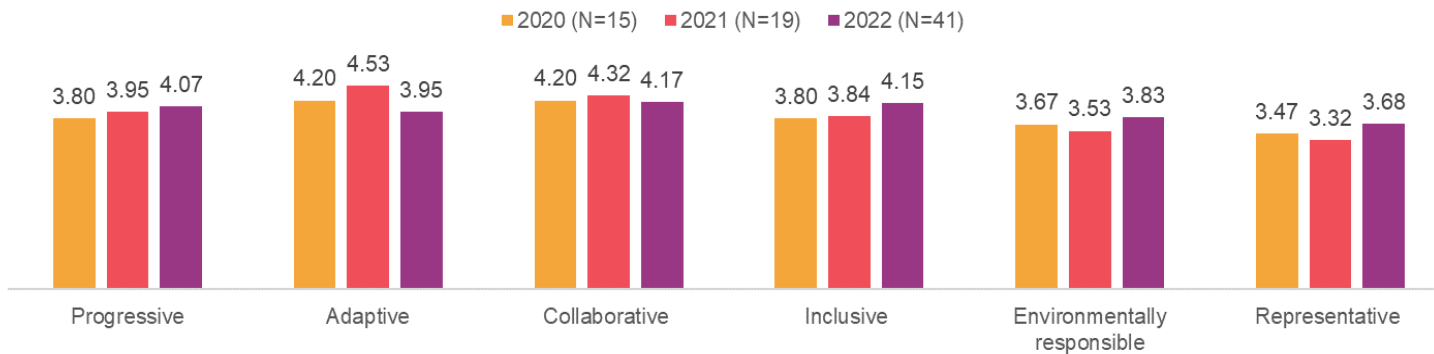
- The majority of staff were satisfied with CBT's progress towards living its values, with **80% of respondents reporting some level of satisfaction.**
- Levels of satisfaction have **declined slightly compared with last year (2021)**, but remain higher than in 2020.



¹ See slide 5 for an explanation of the weighted scores used here

Progress towards living each value

To what extent do you agree that CBT is aiming to be...¹

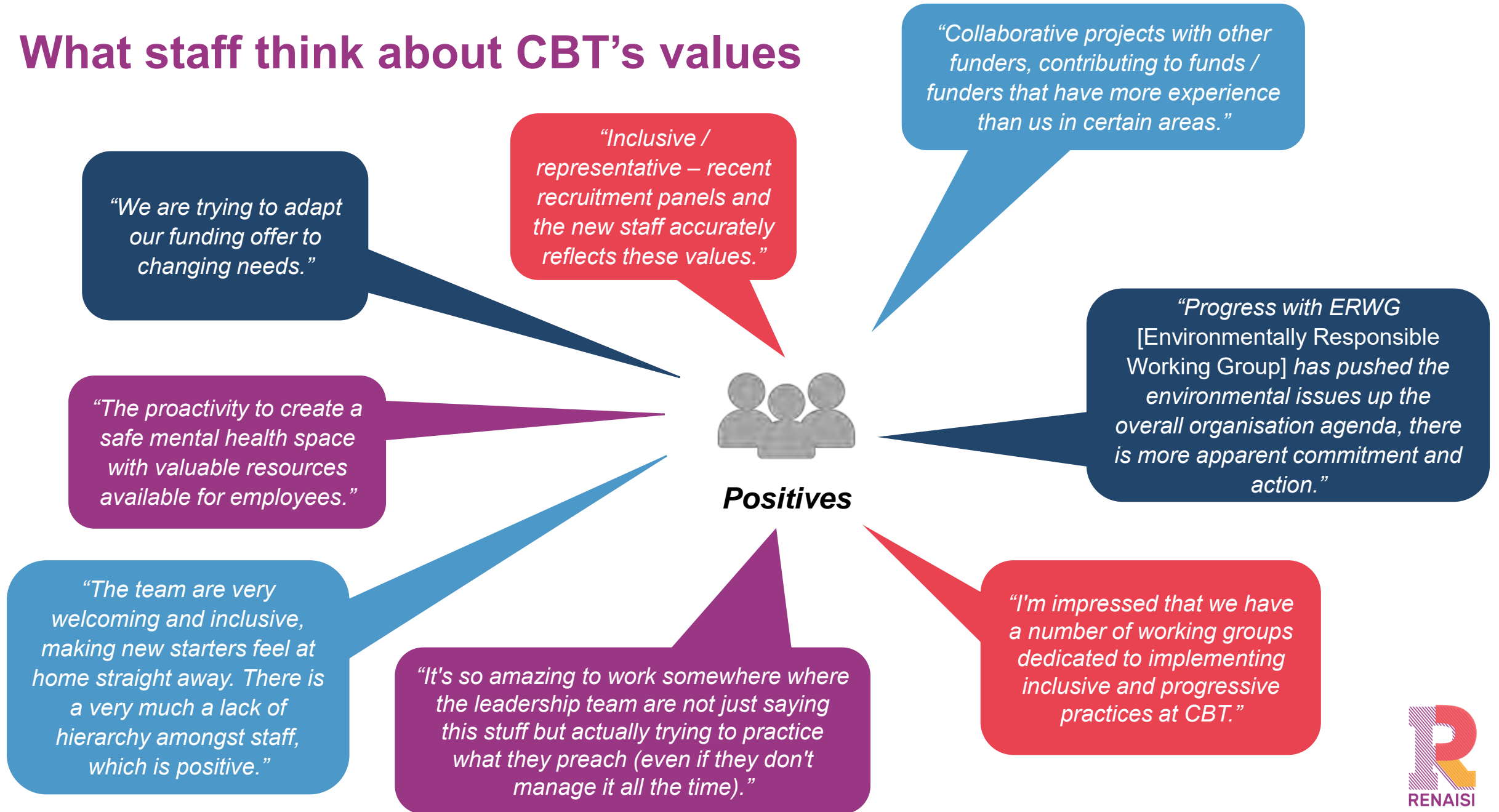


- When asked about the progress CBT was making with its values, **staff responses were typically positive.**
- There was particularly **strong agreement that CBT is aiming to be progressive, collaborative, and inclusive** with more moderate agreement on other values.
- Staff rated the values **progressive, inclusive, environmentally responsible, and representative more highly than in 2021.**

- The progress towards becoming **environmentally responsible** is particularly significant as this was identified as an area in which staff felt further work was needed in our most recent mid-year 4 review. One staff member noted that this improvement correlated with the activities and progress made by the Environmentally Responsible Working Group.
- Although levels of agreement for the collaborative and adaptive values **were strong in 2022, both have decreased compared to 2020/2021.** In 2020 and 2021, the **CBT team pivoted quickly to new ways of working and collaborated with other funders in the London Community Response**, adapting its work to the extraordinary circumstances of the pandemic. While learnings from this period have been embedded into subsequent initiatives, it is perhaps unsurprising that these scores have fallen as CBT has moved out of its immediate crisis response.

¹ See slide 5 for an explanation of the weighted scores used here

What staff think about CBT's values



What staff think about CBT's values

"CBT is aiming to be those values but is facilitating some values more than others. For example, although there is a desire to be representative and inclusive our organisation and grants committee is not representative of London so is by default less inclusive."

"We have a set of really good values, but I'm not sure that everyone across the organisation sees that they should be central to everything we do all the time, or remembers to centre them in every decision."

"More collaboration where possible."

"We need to streamline processes further, make it easier to apply. Take more risks with funding. Make core funding available more easily."

"The size and complexity of grants and processes potentially excludes a swathe of organisations."



Challenges

"There is more evidence of some of the values in some teams than others."

"Values piece feels like something we bolt on to pieces of work when they fit."

"We need to make sure there is appropriate resourcing provided across all areas of the values led work."



Areas that need more focus

"Pushing further to create a more representative team."

"[We need to be] going further with the environmentally responsible value."



Becoming a learning team

Learning team: a team which 'actively creates spaces and opportunities for knowledge and intelligence to inform and shape its day-to-day practices as well as its future direction, and embeds these within its culture' (source: [IVAR](#))

Summary of findings

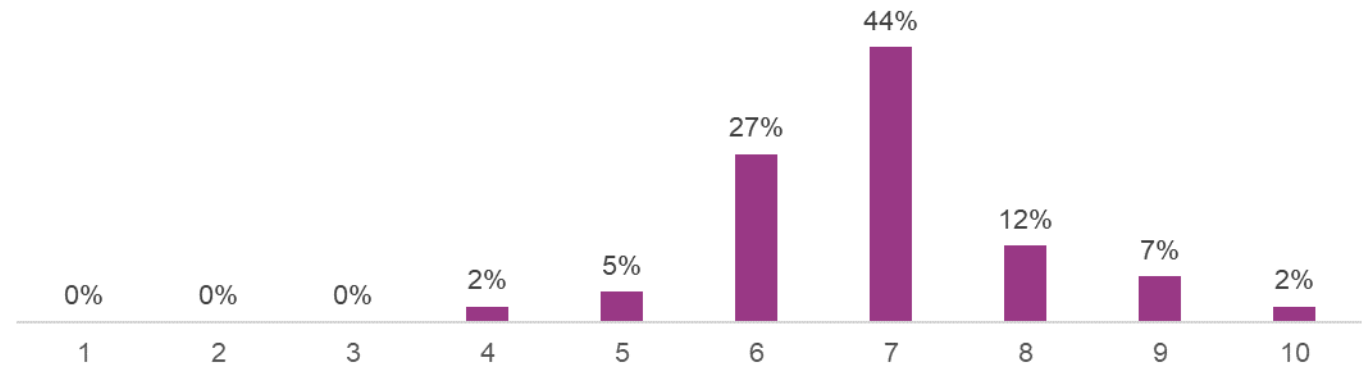
Becoming a learning team

- Survey responses indicate that **CBT is making progress towards becoming a learning team**. CBT staff feedback was broadly positive, and comparisons with results from previous years demonstrate that progress is being made.
- Staff highlighted several ways in which learning has **been successfully shared and used** over the last twelve months, including the **work of the Impact and Learning Team, data digests, different opportunities to learn from funded organisations**, and a **more general sense that CBT is developing a culture of learning**. Overall, staff observed that the team has effectively shared learning internally over the last twelve months (while external learning increased gradually over time).
- To build on existing good practice and encourage the use of learning across the whole team, staff felt that time could be **allocated or ring-fenced within their day-to-day work** so that they could properly engage with learning.
- Responses to the survey suggest that the CBT team has improved how it shares learning externally since 2020. However, CBT staff felt that **further work is needed to ensure that CBT is making the best use of its data externally**.

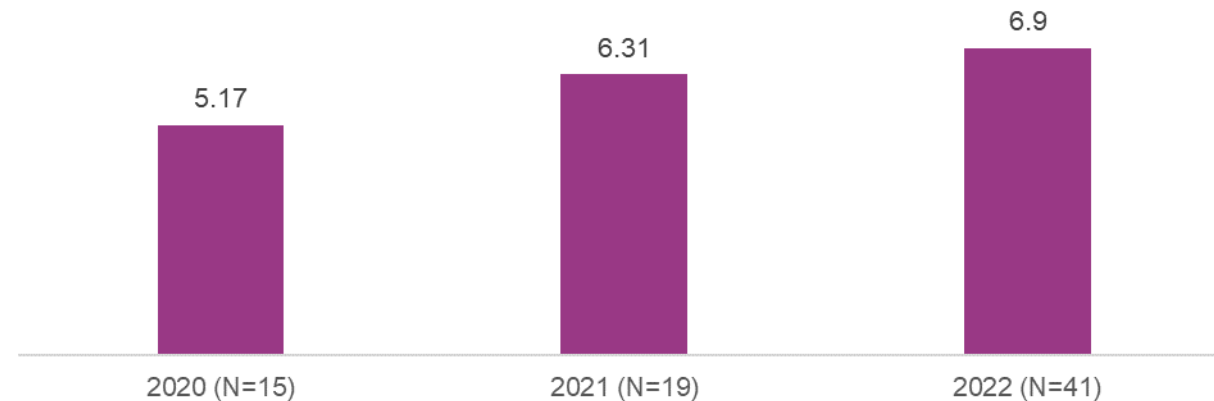
The journey to becoming a Learning Team

- Staff generally felt that **CBT was making progress towards becoming a learning team**. 71% of staff rated CBT at six or seven out of ten on the journey towards becoming a Learning Team.
- There has also been a **positive change in staff perceptions year on year**.
- **On average, staff rated CBT 6.9 / 10 on the journey towards becoming a learning team**. In 2020 and 2021 this rating was lower at 5.17 / 10 and 6.31 / 10 respectively.

One a scale from 1-10, where we are on our journey to becoming a Learning Team? (N=41)

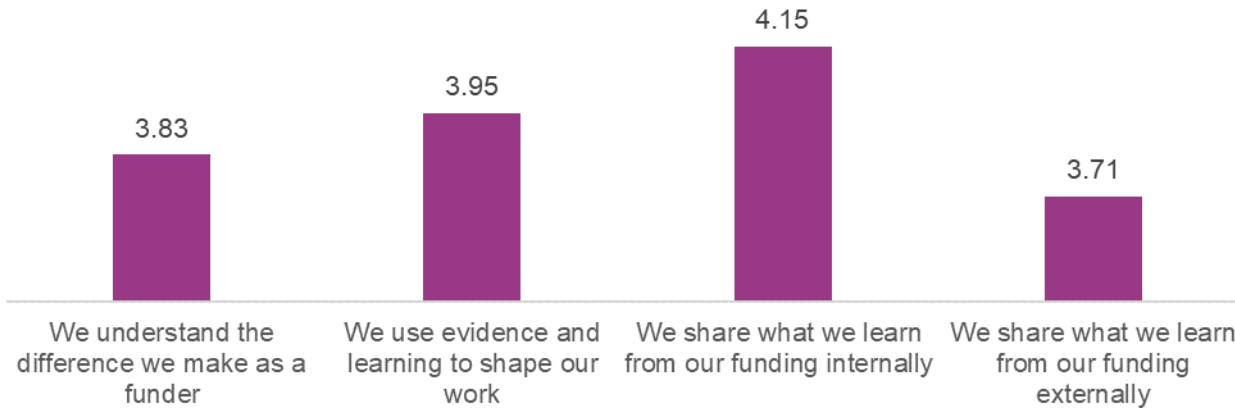


Where we are on our journey to becoming a Learning Team

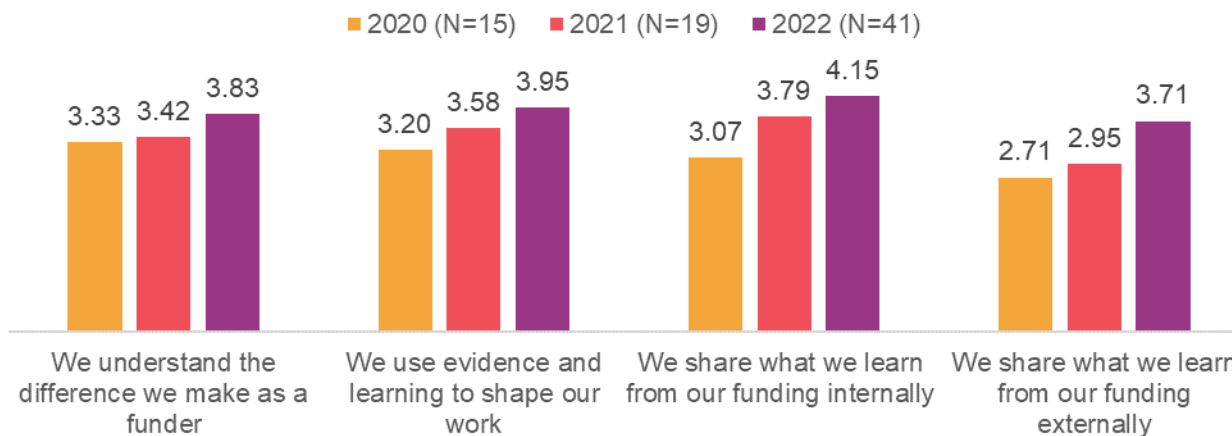


Learning within CBT

Weighted agreement statements - To what extent do you agree with the following statements: (N=41)

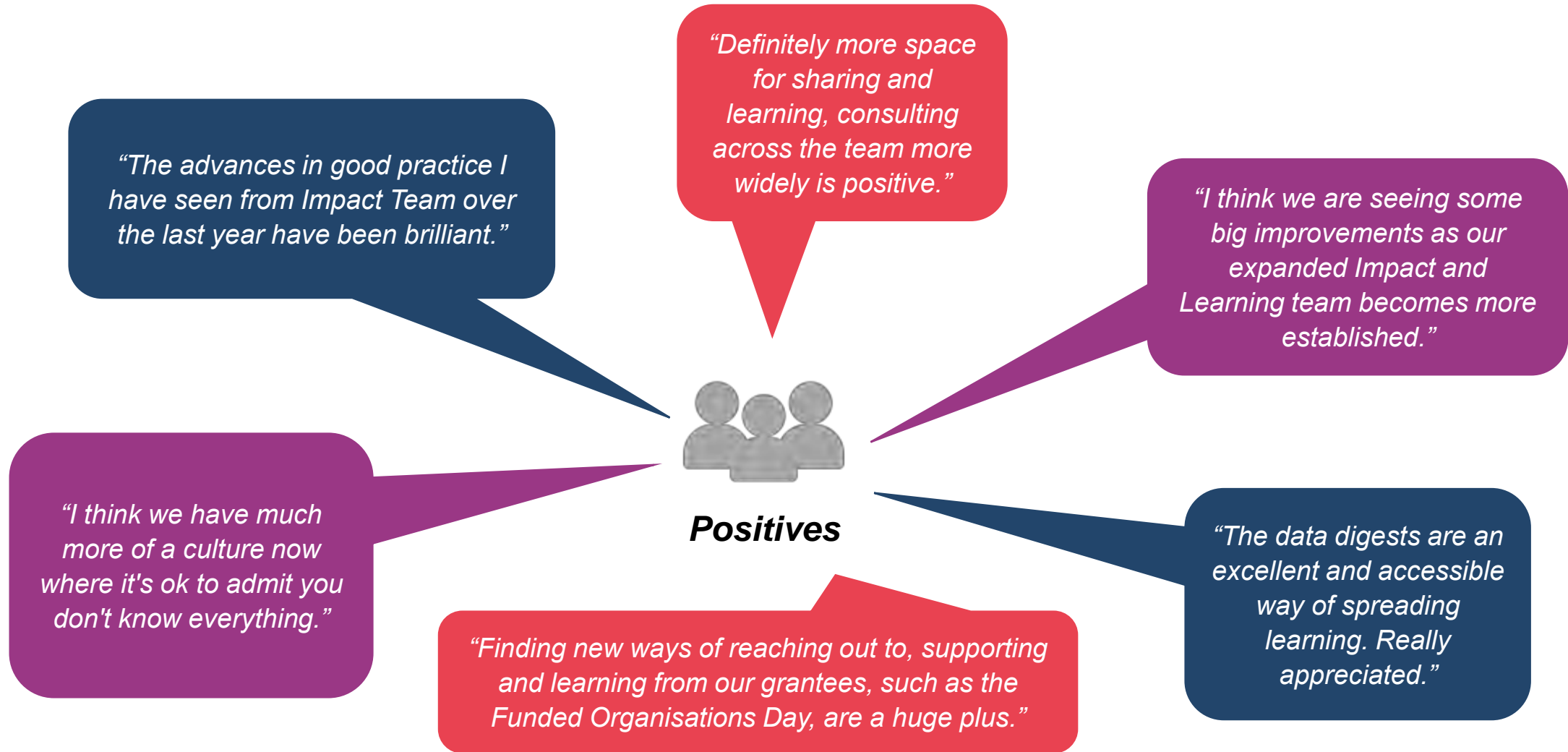


To what extent do you agree with the following statements:



- When asked about specific aspects of CBT’s learning culture, **responses were positive.**
- On average, **staff agreed with all statements** relating to the use of learning within CBT, with particularly **strong agreement that CBT shared learning from funding internally.**
- Agreement amongst staff **has increased steadily since 2020.**

What staff think about CBT's learning



What staff think about CBT's learning



Conclusions and Recommendations

Conclusions & recommendations

Embedding values and learning

- Overall, evidence shows that **CBT has become more of a learning and values-led team since 2020**, the first year in which the CBT team completed our regular survey.
- Over the past year, **several initiatives have made that possible**: internal working groups that have pushed different values further up the agenda, efforts to work collaboratively with other organisations, steps towards recruiting a more diverse team, the growth of the Impact and Learning team, the creation of data digests, and more opportunities to engage with learning, amongst others.
- Given their positive impact, CBT should ensure that these initiatives **remain in place / continue going forward**. For instance, staff suggested that additional resources to support the working groups would help to drive progress against these values further.
- **Becoming a learning and values-led team, however, is a journey**. Going forward, CBT should explore a few key questions to ensure they can continue deepening their learning and values-led ethos (see following slide).

Conclusions & recommendations

Questions for CBT to explore going forward

Internally

- **How can CBT ensure that learning becomes embedded evenly across the organisation?** Some members of the CBT team felt that different teams within CBT were at different stages of embedding and embodying its values.
- **How can CBT ensure that progress is made at a similar pace across all values, when appropriate?** More progress seems to have been made on some values than others. Although it may at times be more appropriate to focus on particular values, it is also important to keep some momentum across all of them.
- **How to give team members the right amount of time for learning?** Some staff wanted more time to engage with learning, but others felt that introducing more learning initiatives could place additional pressure on already busy staff if participation is not properly supported (e.g. by ring-fencing time in the working day).
- This also leads to the question – **how can learning be targeted and strategic, so that available time can be used best within the team?** While the Impact and Learning team currently works to align its learning sessions with the team's priorities and the strategic direction of funding, further consideration could be given to how learning can be embedded as effectively as possible across the entire CBT team.

Conclusions & recommendations

Questions for CBT to explore going forward

Externally

- **How can CBT do more to share learning externally?** While there has been improvement over the years, learning tends to be shared internally more than externally. With funded organisations seeming keen to learn more from CBT's experience, there is a real opportunity for this knowledge to create further impact in the sector.
- **How can CBT's values fully translate into its funding decisions?** Some staff felt that the size of grants and application processes may be excluding certain organisations. It will be interesting to review the extent to which funding mechanisms are aligned with CBT's values. This is something that CBT aims to explore as part of its end-to-end user review in 2023.
- **How can CBT understand the impact it is having as a funder?** This was mentioned as a challenge and is further explored in the second section of this report. This is not straight-forward, but it is an important part of becoming a learning organisation.

The impact of CBT support on funded organisations

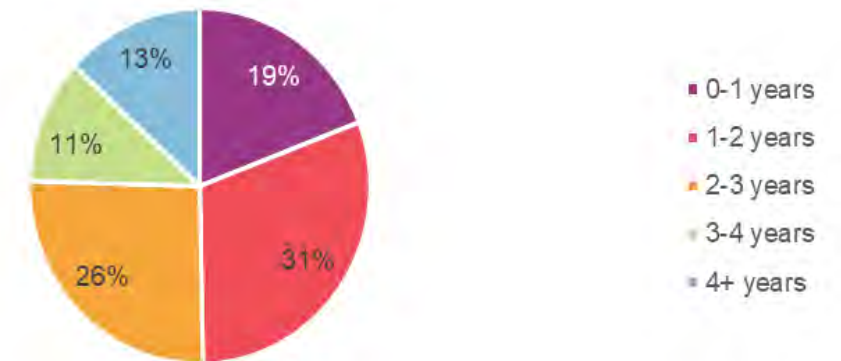
Overview

Surveying funded organisations

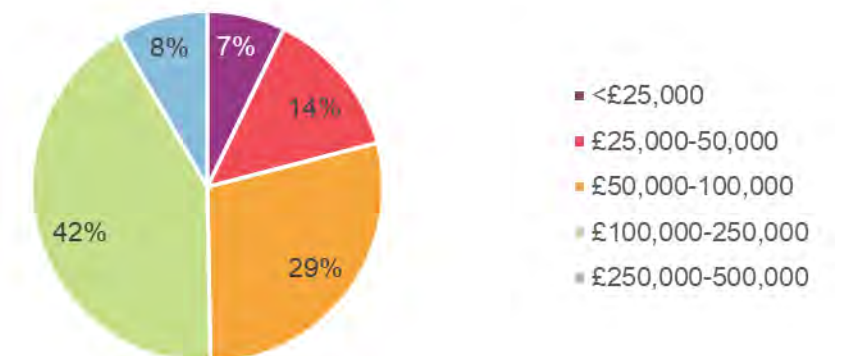
Summary of respondents

- **167 funded organisations** completed our survey. All respondents were recipients of funding under the Bridging Divides funding strategy.
- At the time of completing this survey, **half** of respondents were **less than two years** into their current grant. The **average length** of grant is technically 3 years, however this is skewed by the fact that many 5 year grants are split into two separate grants on the database; the true average is therefore not possible to calculate accurately currently, but is **higher than 3 years**.
- **Half** of respondents had received **under £100,000** of grant funding from CBT. In this respect, the sample of respondents is broadly representative of CBT's overall funding portfolio: of CBT's active grants (563), 47% (268) are under £100,000.

Years of funding received so far on current grant
(N=167)



Size of grant (N=167)

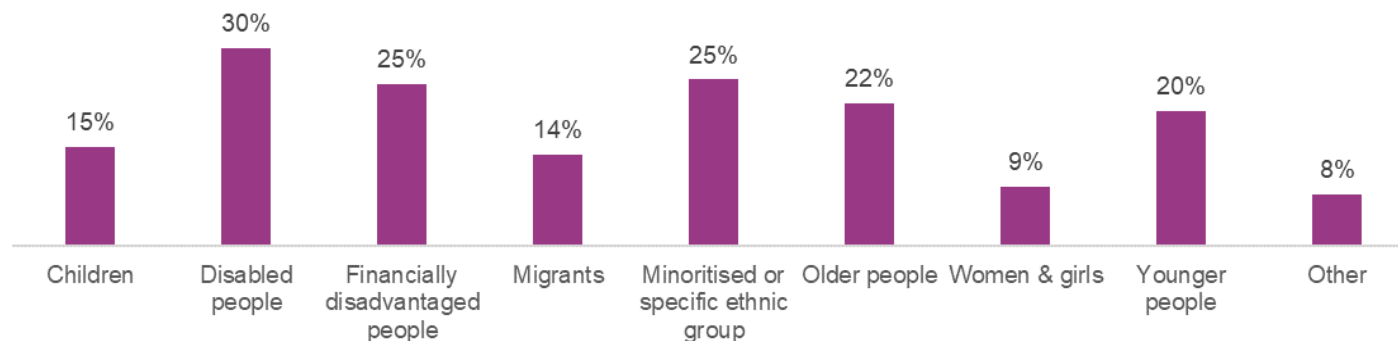


Surveying funded organisations

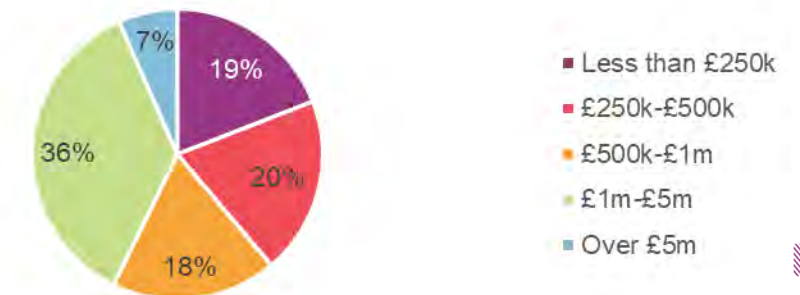
Summary of respondents

- The most common target groups survey respondents worked with were **disabled people** (30%), **financially disadvantaged people** (25%) and **minoritised people or specific ethnic groups** (25%).
- Over **half** of respondents (57%) had **less than £1 million** annual turnover.

Target group (N=167)
(respondents could select more than one answer)



Size of organisation by annual turnover (N=167)



Surveying funded organisations

Alignment with CBT aims and mission

Please indicate the extent to which you agree with the following statements, which relate to the mission and vision of City Bridge Trust (N=167)

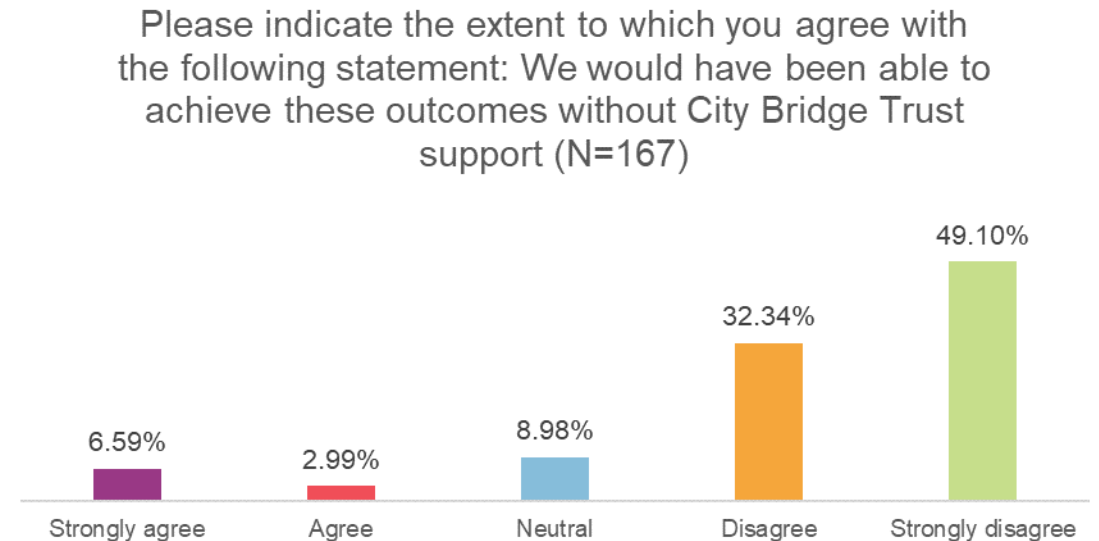
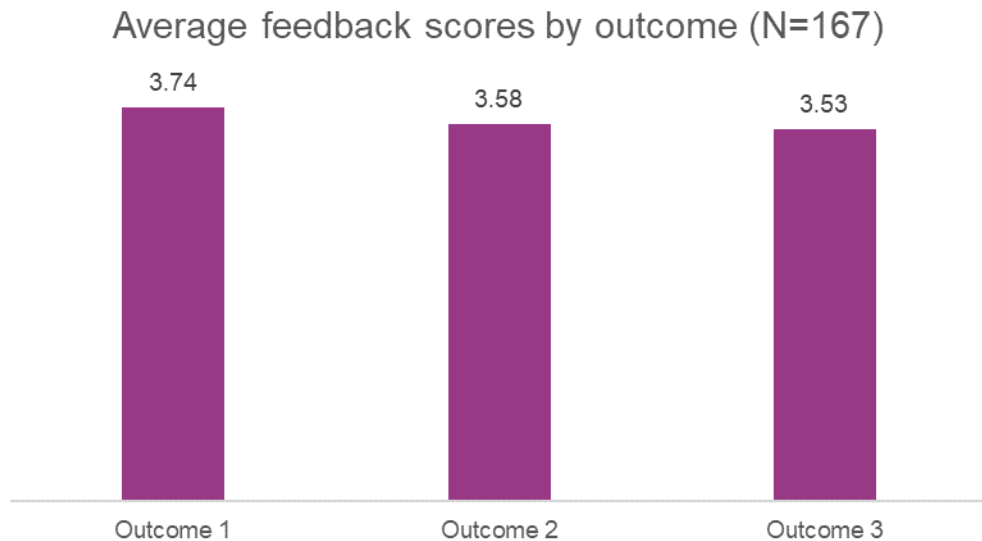


- Participants **strongly agreed** that **their work aligned with City Bridge Trust's aims and mission** as an organisation. All five of the above agreement statements received weighted scores above 4.4 (with 5 being the maximum), indicating strong levels of agreement that funded organisations' work aligns with CBT's aims and mission.

Impact of CBT funding and support

Impact on funded organisations

Achieving funding outcomes

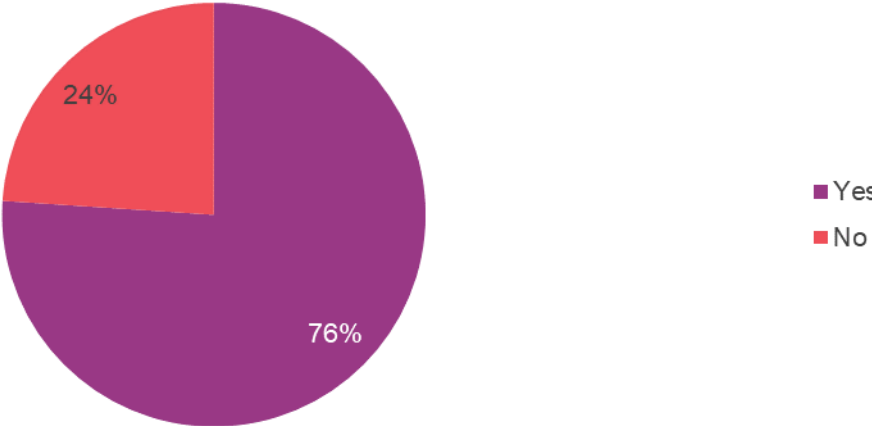


- When completing our survey, organisations were asked to rate the **extent to which they were achieving their three primary outcomes** (with 0 being not yet started, and 5 being completely achieved), which organisations set at the start of their funding. The average scores for all three outcomes were between **3.5 – 3.75**, which suggests that organisations were moderately positive about the extent to which they are achieving all three of their stated outcomes.
- The **majority** of respondents (81%) **disagreed** with the statement “we would have been able to achieve these outcomes **without City Bridge Trust support.**”

Impact on funded organisations

Non-funding support

Have there been any other positive effects (achieved or anticipated) of your relationship with City Bridge Trust?
(N=167)



“Being able to dip into a wide range of information - access to courses, initiatives, workshops and networking, and other potential funding opportunities that we would not have had. A consequent sharing and widening of knowledge among staff.”
Survey respondent



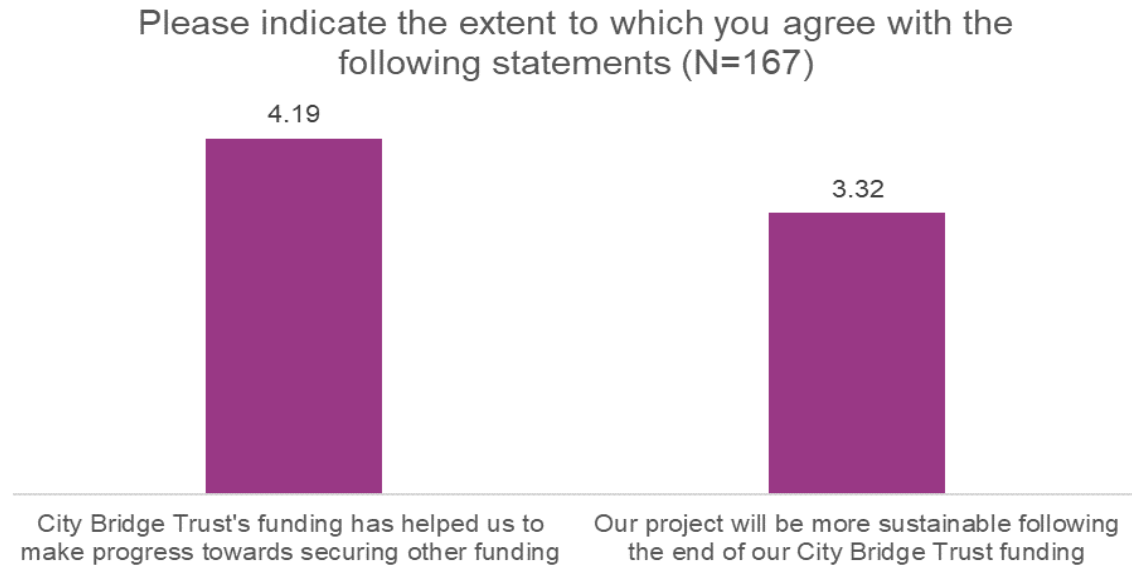
“The networking event was a great experience and provided a great space for us to share our experiences on operating throughout a pandemic. Great connections were made with other grantees and the shared experiences were very helpful.”
Survey respondent

- **Three quarters** of respondents (76%) reported there had been **positive effects of their relationship** with City Bridge Trust beyond funding.
- Respondents highlighted **networking opportunities, free training** and opportunities to **access additional funding** as the main positive effects of receiving City Bridge Trust support. This reflects findings captured in internal CBT quarterly reviews of funded organisations data conducted in 2021 and 2022.



Impact of CBT funding

Future sustainability



“Funding from City Bridge Trust gives a mark of confidence in our work which is hugely valuable when seeking other funding.”
Survey respondent

“We feel that support from the trust has built our credibility with other funders - most notably NESTA Cultural Impact Development Fund.”
Survey respondent

- There was a **strong level of agreement** that City Bridge Trust funding had helped respondents make progress towards **securing other funding**. Many stated that receiving funding from City Bridge Trust gave their organisations credibility in the eyes of other funders. This reflects feedback gathered in CBT’s own quarterly reports since 2020.
- There was a more **moderate level of agreement** that respondents’ projects would be **sustainable** at the end of City Bridge Trust funding.

Impact of CBT funding

Supporting target groups

There was a mixed picture in terms of the impact achieved by funded organisations over the last twelve months. While some organisations were able to make progress towards their outcomes, others found it difficult as the Covid-19 pandemic caused considerable disruption to their services (explored in more detail on the next slide).

Among those organisations who scored more highly on achieving their outcomes, there were three areas in which they had an impact:

- **Supporting vulnerable or marginalised communities**
- **Forming relationships with other organisations and communities**
- **Building skills and confidence among target groups**

Organisations demonstrated their impact in these areas by referencing monitoring and evaluation data they had collected over the course of their funded programme or project.

"We're doing well here, the whole group bonds as a community."

Interviewee

"In the last 3 years we've assisted 118 people who were homeless into secure housing and secured half a million in benefits."

Interviewee

"Long-term funding from the City Bridge Trust has been critical to delivering our services. Our surveys show a huge improvement in areas such as physical and mental wellbeing, although this is an ongoing process and cannot be 'completely achieved.'"

Survey respondent

"Each individual element of the programme was ranked as at least 80% finding it made a difference, in how they rated their organisation's skills and confidence in their ability before and after the programme."

Interviewee

Challenges

The impact of the Covid-19 pandemic

Unsurprisingly, the Covid-19 pandemic had a major impact on funded organisations' ability to deliver their services and achieve their intended outcomes. There were three primary ways in which Covid-19 prevented organisations from realising their outcomes:

- 1. Staff capacity:** many organisations struggled to continue their services owing to staff sickness and high levels of stress and burnout. For other organisations, recruiting qualified staff and volunteers proved challenging.
- 2. Adapting to online delivery:** During periods of lockdown, funded organisations had to pause all face-to-face activities. This forced many to adapt their services for online delivery. While this worked for some organisations, it was much harder for others.
- 3. Lower engagement from target groups:** Following the easing of lockdown restrictions, some organisations found it difficult to engage their target communities. This was particularly an issue for organisations working with vulnerable communities.

As a result, many organisations had to **adapt their outcomes** to reflect different models of delivery or lower levels of engagement. Most organisations noted City Bridge Trust's flexibility and support during this time made these changes easier.

"Our programme had to stop during the 2 years of Covid as it involves direct face to face research, so we are well behind on achieving our original outcomes."

Survey respondent

"Once the Covid restrictions came in it was more difficult to build relationships online compared to in person."

Interviewee

"Covid has prevented us from some of our usual activities, in particular our work delivering advice in detention centres."

Survey respondent

Challenges

Measuring progress towards outcomes

Some funded organisations noted that they found it difficult to measure the impact of their work. The challenges identified by survey respondents fell into three broad categories:

- **Demonstrating impact:** Several organisations described their difficulty in attributing impact to their services or work. This was particularly an issue for funded organisations who were looking to demonstrate progress made towards less tangible outcomes, e.g. increases in confidence or wellbeing, and those who were not directly delivering activities or services.
- **Lack of time:** Some organisations collect a variety of data but do not have the time or staffing capacity to analyse the data they collect.
- **Participant bias:** Other organisations expressed concern that, as they were collecting feedback from the communities they worked with, themselves, there was a risk that respondents would be more likely to report positive impacts and outcomes.

"It's very difficult to measure impact, this is one of the things we struggle with in terms of our development as an infrastructure organisation, because we don't deliver services you don't always see the impact we've had."

Interviewee

"The outcomes we work towards are difficult to evaluate in empirical terms."

Survey respondent

"We don't always have time to analyse the data I'll be honest."

Interviewee

"Because we're the ones asking for feedback on ourselves it's difficult to get an honest answer."

Interviewee

Funded organisations' relationships with CBT

Relationship with CBT

A flexible approach

Funded organisations spoke positively of their relationship with CBT over the last twelve months and highlighted three aspects of their relationship which they particularly valued: **flexibility, trust and open communication.**

- 1. Flexibility:** Organisations praised CBT for their flexibility, particularly as they attempted to adapt to new ways of working and delivery during the Covid-19 pandemic. Many organisations had to change elements of their outcomes or their outputs (e.g., if any outcome included in-person activities), and noted that CBT's offer of core funding, which carried less restrictions than project funding, enabled them to maintain their projects at a time of deep uncertainty.

“Once Covid hit, they understood, and it was really helpful of them to un-restrict some of those funds for certain activities. Then, we could use the funding for the activities we could deliver and repurpose the ones we couldn’t.”

Interviewee

“CBT allowed us to change the desirable eligibility criteria based on the needs of the sector at the time, they were totally on board with us making changes... It’s really great to have a funder so chilled out and supportive.”

Interviewee

“They’ve allowed us to have an extension on our reporting the last two years, it’s been helpful.”

Interviewee

Relationship with CBT

Trust and open communication

- 2. Trust:** Organisations observed that CBT were proportionate in their monitoring requests, which made them feel that they were trusted to get on with their funded activity. Several organisations noted that support and help was available when they wanted to access it.
- 3. Communication:** Many organisations, particularly those interviewed, noted that having a point of contact within easy reach was a positive of the relationship with CBT. They spoke highly of their grant / fund manager by name, and many had examples of their helpfulness. This was reflected in survey feedback: organisations valued the relational nature of CBT's funding practice, as they felt it was easy to have honest, frank discussions with their grant / fund manager.

These findings reflect similar feedback gathered during our last survey of funded organisations in 2019: organisations described CBT as an open and approachable funder, and many felt comfortable sharing learnings with their funding manager – even when they hadn't achieved their outcomes.

"I know a lot of my fellow programme managers have a lot of worries because of pressure from the funder. But with CBT there's the understanding that they trust us and understand we're able to cope with any challenges we face."

Interviewee

"I've felt incredibly supported by the grant managers, they balance it really well, they're there when you need them."

Interviewee

"It really helps that we have their named contact person... I love building up that relationship, you get to a sort of understanding and you can pick up the phone and talk to somebody about any questions."

Interviewee

"[CBT are] always really open to having conversation, being able to take on ideas we've had and have key discussions during difficult times."

Survey respondent

Support needs of funded organisations

Support needs of funded organisations

Funding needs

While many organisations noted that they had enough financial support, there were three key issues which were consistently identified by those organisations which noted their need for additional funding:

- **Extra staffing needs:** Many organisations wanted further funding so that they could afford more key salaried positions that could help them to achieve and surpass their outcomes.
- **Sustainability of impact/funding:** The need for further funding to continue their impact was noted particularly by organisations who felt they had achieved their outcomes (or were on track to achieve them). These organisations suggested they could achieve further impact with a continuation of their funding / longer-term funding.
- **Covid-19:** Many of the original outcomes set by organisations became unattainable during the pandemic, and therefore led to some outcomes being changed, or taking longer to achieve. Organisations that were badly affected by Covid-19 identified an increased need for additional funding – especially when responding to higher levels of demand among their target communities.

“Extra staffing capacity would help us improve on outcome 3.”

Survey respondent

“[We need] long-term funding to ensure continuity of provision.”

Survey respondent

“The client group is in great need, exacerbated by the pandemic – there is a lot more that could be done to support these vulnerable individuals.”

Survey respondent

Support needs of funded organisations

Relationship building support

When asked what forms of non-funding support they would benefit from, funded organisations frequently identified relationship building and networking as a key area of support. Organisations suggested that CBT could support them to establish connections with three different stakeholder groups:

- **Other funders:** Many organisations asked whether CBT could support them to find other sources of funding, for example through connecting them with other funders.
- **Similar funded organisations:** Many organisations felt that CBT could offer additional networking support to bring funded organisations together. Organisations expressed interest in forming connections and partnerships with others working in their sector and felt that CBT could use its role to facilitate these connections.
- **Potential volunteers and staff members:** Some organisations felt CBT could use its network to assist them with their day-to-day operations, for example by putting them in contact with volunteers.

This mirrors some of the feedback gathered in our last survey of funded organisations. In 2019, over 42% of organisations suggested that CBT could bring together learning networks of organisations who have shared interests.

“Finding long-term and sustainable funding is a priority, so any support finding new sources of funding would be helpful.”

Survey respondent

“Introductions to more similarly funded organisations to scope potential partnership working, facilitating those links would help us achieve our outcomes.”

Survey respondent

“Support with recruitment of volunteers and raising awareness of our organisation.”

Survey respondent

Support needs of funded organisations

Other needs

Several organisations also identified other ways in which CBT could offer support to their work and future sustainability:

- **Training:** Many organisations were aware that CBT offered training but did not access it. For some, staffing capacity prevented them from doing so; others had not been signposted to the training and did not know what they could access.
- **Promoting their work:** Smaller organisations noted that raising awareness of their work was challenging as they had limited reach through their social media channels or limited communications capacity. Some organisations suggested that CBT could promote their work on its social media channels to promote greater awareness of the work that funded organisations are doing.
- **Visits:** A few organisations wanted CBT to visit their projects more often so that funding managers would have a better understanding of their needs. Again, this reflects feedback from our previous survey of funded organisations: prior to the Covid-19 pandemic, organisations also suggested that more visits would help them to demonstrate their impact.

“Please send information about your free training and network events. To date we can't recall receiving information about these.”

Survey respondent

“The support is brilliant but sometimes organisations lack capacity to use the support.”

Interviewee

“We have limited access to social media, publicity and advertising. We would appreciate further support from CBT with public awareness of our organisation.”

Survey respondent

“Visits to our activities would be really useful for the grant-officers to understand in more depth the needs of our community and how we work.”

Survey respondent

Conclusions and Recommendations

Conclusions & recommendations

Impact on funded organisations

- The question ‘what impact has CBT had on funded organisations’ implies **two levels** of analysis: (i) the impact that CBT has had on **organisations** themselves, and (ii) the impact that they, in turn, have had on their **end users**. While CBT rightly cares about understanding both, its indirect impact on end users is more challenging to assess than its direct impact on funded organisations. This is exacerbated by the often less tangible nature of the impact that some funded organisations aim to achieve.
- Overall, CBT has played an **important role for funded organisations**. CBT has managed to build trust with them, has maintained open communication, and has been flexible. Such ways of working, alongside funding, have enabled organisations to **adapt and continue their services** in the face of the pandemic. This is a noteworthy impact as organisations cannot benefit end users without being viable in the first place.
- **Funding** continues, however, to be **front of mind for many delivery organisations** in this post-pandemic context. Many talked about their funding needs and valued the credibility that CBT gave them with other funders. The non-funding support they wished for was also often related to funding, such as introduction to other funders or support with promoting their work. Often, a lack of capacity underpinned many of the challenges organisations faced (e.g., with impact measurement). Going forward, CBT can continue to have a substantial impact in the sector by **funding and supporting the sustainability of delivery organisations**.

Conclusions & recommendations

Impact on funded organisations

- Currently, CBT's current grant holders can access **the 'Funder Plus' offer**, which includes:
 - The **Bridge Programme**, where funded organisations can access free, additional support from CBT's network.
 - The **STRIVE programme**, which provides business advice and guidance to funded organisations.
 - Other types of support through such as property advice, Eco-Audits, and support to test repayable finance models.

The Bridge Programme provides fundraising support and the STRIVE programme marketing support, which **align well with the current need** of organisations to access further funding. CBT could **further promote those programmes** to funded organisations, highlighting the types of support that align well with their current needs.

- Going forward, CBT should continue **communicating about non-funding offers**, and **monitor** the reasons why people may not take them up, so action can be taken to make them more widely accessible. As part of its broader comms activity, CBT should also continue to **share content from funded organisations** on social media to highlight their work to a wider audience.
- The **network and learning** event delivered by CBT in April was well received by funded organisations. This or similar events could be **organised in the future** to support organisations to expand their networks.
- Finally, CBT plans to **restart its learning visits**, which organisations wished to see reintroduced. These visits will enable organisations to showcase their work and further strengthen their relationship with CBT.

Conclusions & recommendations

Impact on funded organisations

- Regarding CBT's **indirect impact on end users**, it is important to mention that many funded organisations did not feel like they would have achieved their intended impact without funding and support from CBT. In that sense, change created by funded organisations **can partly be attributed to CBT**. In other words, CBT did have an impact on the people it aims to reach down the line.
- **What that impact looked like, however, is less clear**. While funded organisations have achieved a range of positive outcomes and addressed a variety of needs (e.g., supporting disabled people, providing advice and employment support, etc.), those were **specific to each organisation** and are difficult to generalise – in the context of the present research – across CBT's portfolio.
- **Measuring that end impact itself comes with a range of challenges**. With end users and organisations self-reporting impact to the people who support or fund them (respectively), response bias is likely to be at play. And given several funded organisations declared finding impact measurement challenging – for various reasons – the data they report may not always be robust or reliable. Going forward, CBT should explore ways to collect reliable impact data across their portfolio, in a way that can be manageable and valuable for funded organisations.

Appendix

CBT's impact on funded organisations

Comparing our findings with other CBT data

Our findings	CBT data
<ul style="list-style-type: none"> • Slide 33: Three quarters of respondents (76%) reported there had been positive effects of their relationship with City Bridge Trust beyond funding. • Respondents highlighted networking opportunities, free training and opportunities to access additional funding as the main positive effects of receiving City Bridge Trust support. 	<ul style="list-style-type: none"> • Highlighted in quarterly reviews of data from funded organisations. The positive effects identified have been consistent throughout 2021 & 2022. See Feb-April 2021 report for summary. • The value of networking opportunities has also been highlighted in case studies
<ul style="list-style-type: none"> • Slide 34: There was a strong level of agreement that City Bridge Trust funding had helped respondents make progress towards securing other funding. Many stated that receiving funding from City Bridge Trust gave their organisations credibility in the eyes of other funders. 	<ul style="list-style-type: none"> • Adding credibility, increasing capacity for fundraising, helping develop partnerships, increasing financial stability & helping build evidence base, all of which helps secure further funding, have all consistently come up as positive benefits on fundraising in quarterly reports from the last two years
<ul style="list-style-type: none"> • Slide 34: There was a more moderate level of agreement that respondents' projects would be sustainable at the end of City Bridge Trust funding. 	<ul style="list-style-type: none"> • CBT have consistently found that a majority of funded organisations report CBT funding has helped improve their organisational sustainability - particularly with longer term grants. This has been highlighted in quarterly reports and case studies.
<ul style="list-style-type: none"> • Slide 35: Three impact areas identified by respondents: (i) supporting vulnerable or marginalised communities; (ii) forming relationships with other organisations and communities, and (iii) building skills and confidence among target groups. 	<ul style="list-style-type: none"> • Case study examples include Commonweal Praxis, Interlink, Lewisham Local, Hopscotch Women's Centre. as well as quarterly reporting, e.g. Aug-Oct 21.
<ul style="list-style-type: none"> • Slide 36: Staff capacity challenges 	<ul style="list-style-type: none"> • This challenge and ways orgs have responded has been covered in CBT's quarterly reports, e.g. Aug-Oct 21 and Nov 21-Jan 22, and case studies e.g. The Wish Centre, Hopscotch Women's Centre & St Joseph's Hospice.

CBT's impact on funded organisations

Comparing our findings with other CBT data

Our findings	CBT data
<ul style="list-style-type: none"> • Slide 36: Adapting to online delivery • Adapting outcomes 	<ul style="list-style-type: none"> • Covered in detail in the Covid barriers, adaptations & learning slides as well as quarterly reports and case studies such as ALLFIE, Grief Encounter, Wish Centre & St Joseph's Hospice. • Examples of this shown in quarterly report May-July 21.
<ul style="list-style-type: none"> • Slide 37: Evidencing impact 	<ul style="list-style-type: none"> • Evidencing impact is often easier for organisations who provide clinical services, see case study on St Joseph's Hospice, or achieve outcomes recognised by statutory services, e.g. case study on Commonweal Praxis. On the other hand, CBT also has evidence of how funding has helped to improve an organisations' evidence base (in quarterly reporting), and evidence of less tangible impacts are included in quotes in case studies e.g. TinderSticks and on the thank you wall.
<ul style="list-style-type: none"> • Slide 39: CBT support – flexibility, trust and open communication 	<ul style="list-style-type: none"> • CBT quarterly reports e.g. Feb-Apr 21, May-July 21, and in the thank you wall.
<ul style="list-style-type: none"> • Slide 42: Additional needs of funded organisations - extra staffing, sustainability of impact, and the impact of Covid-19. 	<ul style="list-style-type: none"> • The need for this has been highlighted in multiple case studies, e.g. TinderSticks, ALLFIE and quarterly reports e.g. Aug-Oct 21.
<ul style="list-style-type: none"> • Slide 43: Connections with other funders and funded organisations 	<ul style="list-style-type: none"> • Demonstrated in case studies e.g. Wish Centre, Lewisham Local, and St. Joseph's Hospice.
<ul style="list-style-type: none"> • Slide 44: Other support needs – training and promotion of work. 	<ul style="list-style-type: none"> • Shown in case studies e.g. TinderSticks & quarterly reporting e.g Aug-Oct 21. Suggestions from case studies, e.g. Lewisham Local.

RENAISSANCE



Learning Case Study: Hopscotch Women's Centre

Organisation:	Hopscotch Women's Centre
Grant type:	Bridging Divides, Positive Transitions
Grant amount:	£244,210 over five years from March 2022
Grant purpose:	Delivery of a holistic, culturally appropriate, trauma-informed service supporting "easy to ignore" women experiencing or at risk of abuse
Interviewee:	Benaifer Bhandari, CEO
Interview date:	17 th June 2022
Website:	https://hopscotchuk.org/
Address:	50-52 Hampstead Road, London, NW1 2PY
BBGM ref:	19066
Funding Manager:	Aasha Farah

Summary

Hopscotch Women's Centre is a user-led organisation providing culturally appropriate support for "easy to ignore" women from racialised communities experiencing abuse and/or social exclusion.

CBT funds their outreach work to reach women not served by other abuse services, 1-1 support and group sessions on recognising, responding to and escaping abuse.

The cost of living crisis is putting pressure on service users and the organisation, with staff bearing the brunt of this.

Hopscotch suggests that CBT's application process could be simplified; this and further recommendations are included at the end of this document.

What makes Hopscotch Women's Centre unique?

Hopscotch is a user-led organisation providing culturally appropriate support for "easy to ignore" women from racialised communities experiencing abuse and/or social exclusion. They address the cultural context & barriers women experience, in ways mainstream services don't.

"Our work reaches those who are easy to ignore and face multiple barriers, not just language and socioeconomic barriers, there can be abuse, big immigration issues, loads of barriers that stop women from becoming Londoners and having the rights that the rest of us have."

Staff come from the communities they support, with 12 languages across the team.

They provide holistic support and advocacy using trauma informed approach, including:

- Abuse awareness & support
- Housing & welfare rights advice
- Support to access, and progress in, employment
- Mental health and confidence-building groups

“We work in a trauma informed way, which means when people come to us we don’t demand the whole story, we work at their pace, respectful of what they need to disclose and when. That takes a long time ... the more confidence and rapport is built, the more disclosures there will be and the longer we’ll need to keep working with them.”

The Homecare social enterprise arm offers women routes into employment as professional carers.

“We really elevate people to a place where they have the confidence to advocate for themselves. That journey is very very long.”

What part of Hopscotch’s work does CBT fund?

CBT’s grant funds:

- Outreach work to reach women not served by other abuse services
- 1-1 support and group sessions on recognising, responding to and escaping abuse
- Working with and empowering local charities to address abuse
- Confidence and skills building support to aid women’s independence

“We position ourselves in places where we know there’s very little support, like Tower Hamlets, Brent, Southwark... We engage essential places where women go such as school gates, GP surgeries, pharmacies. We put on events around food, arts & crafts, and show ourselves as a trustworthy space.”

“So-called honour based abuse, FGM, forced marriage ... Statutory bodies don’t have the framework to understand these cultural issues, which are life-threatening, so for them it’s easy to close the file – but it’s because your page [of questions to ask] is irrelevant to this person.”

“We have drop-ins, referrals and peer-led workshops where women from different cultures can learn together about the signs of abuse ... It’s a beautiful thing because women can realise it’s not just their community, they get a deeper understanding together.”

How are current inflationary pressures affecting Hopscotch?

Financial pressures in families increase rates of abuse so the need for Hopscotch services is increasing.

“When families are under financial pressure, sometimes the woman becomes an easy target, and her needs increase, so we’re having to brace ourselves for that ... While

simultaneously wanting to see that increase, because if we know that there is a rise in abuse and yet we don't have a rise in women coming to us, that's even more worrying."

Staff are under financial strain whilst also dealing with the increased demand for services, but raising salaries means dipping into reserves. It is also getting harder to recruit specialist staff.

"Your work is increasing because your service users are suffering financially and you're trying to help them get through this time and you're working longer hours and you're suffering yourself."

"We did an analysis of if we did a 2% hardship bonus in one month [for staff] ... but it came to so much I don't think it would be possible. And that's soul destroying, it really really is ... In an ideal scenario I wish all our funders would contact us and say you should be doing this as a one off hardship payment and here's the money."

How could funders better support Hopscotch?

Hopscotch need funders to invest in work supporting women with complex cases over the longer term and reduce restrictions on grants to allow staff to support women in the most effective way

"We have one [VAWG] project that's only for complex cases and that's really difficult to get funding for, which I think is indicative of funders not wanting to look at the really hard stuff. The work that is most essential is the one that's hardest to keep going."

Funders also need to recognise the importance of funding work towards softer, slower outcomes.

"Funders say we want to see hard outcomes, that they've got an income, but our women are so far away from that, those soft outcomes are really important."

Funders could also help by making it clear from the outset what they will and won't fund. CBT in particular could work to reduce the burden of the application process.

"City Bridge email you every day for tiny nuances on your accounts, we found that quite difficult when everyone was overstretched, the constant 'can you break this down, can you send it in this way.' That was painful. I wish there had been another way around that, it would have been quicker to do a visit with the finance team and just ask the questions there and then."

What can CBT learn from Hopscotch?

Hopscotch demonstrates the importance of culturally appropriate, user-led services; **CBT should continue its work to fund more of these.**

Hopscotch highlights the difficulties of getting funding for complex cases and 'soft' outcomes; **CBT should invest more in the slower, specialist work this requires.**

Hopscotch points out the pressure the cost-of-living crisis is putting on organisations; **CBT could consider providing additional funds to existing grantees to mitigate this.**

Hopscotch suggest how the application process and financial requirements could be done more effectively; **CBT should consider using calls or visits to minimise the burden on applicants.**

Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: Supporting grant-holders with inflationary pressures and increased demand	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 (funding allocation from Bridging Divides designated grant making fund)
Report of: David Farnsworth, Managing Director of BHE	For Decision
Report Authors: Tim Wilson, Funding Director and Social Investment Fund Manager	

Summary

This report recommends a programme of additional support to help current grantees manage cost pressures from rising demand and high inflation. It has a provisional total value of £3.5m and is recommended as the most cost- and time-efficient way City Bridge Trust (CBT) could support grantees. If agreed, funds would be released as a series of individual awards to existing grantees rather than a single grant and as such the decision rests with this Committee. The proposal is in line with other high-profile funders and with recommendations made to the funding sector by well-regarded advisory bodies. The proposal is presented in context of the pressures UK households face with energy, food, and other living costs. It is structured as additional support for the coming 12 months, given uncertainties of economic forecasts. There is precedent for this approach, and the recommendation is consistent with CBT’s additional support awarded around the first Covid lockdown measures (which was very well regarded).

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity’s best interests:

- i) Agree a programme of additional support (with an estimated total value of £3.5m) to selected grant-holders in the form of one-off unrestricted grants, calculated based on 10% of the funding due over the coming 12 months to help them counter general inflationary pressures and increased demand.
Funding to be reserved for:
 - a. Awards made under the Trust’s open programmes
 - b. Current grant-holders whose awards were made on or before 1st May 2022
 - c. Those identified by Funding Managers

Awards to be pro-rated for those with less than 12 months remaining on their funding agreements with CBT.

- ii) The total value of the programme to be agreed by the Chair and Deputy Chair under delegated authority.
- iii) Individual awards to be approved by the Managing Director of BHE under delegated authority.
- iv) Authorise officers to work with fuel and food poverty umbrella organisations as well as community credit providers to present proposals to the Grants Committee to support Londoners with the impacts of high inflation.
- v) Authorise officers to work with other grant-makers in the sector to develop a pan-funder response to high inflation.

Main Report

Background

1. UK households are experiencing the sharpest drop in living standards since records began in 1956. Inflation (the rate at which prices rise) has been increasingly steadily through the year. Against a target level of 2%, the inflation rate has risen from 9.1% in May to 10.1% in August. Government intervention in early September is expected to mitigate some inflationary pressures, but inflation is still anticipated to stay around 10% in early 2023.
2. Cost-of-living pressures occur when inflation outpaces income (whether from work, benefits, or a combination of both). The Office for National Statistics reported regular pay growth of 4.7% in June 2022 and whilst in-work poverty is a growing issue, the poorest (those reliant entirely on state support¹) saw benefits rise by 3.1% in the Spring². This latter group had already taken an income hit in Autumn 2021 when the £20 weekly uplift to the basic rate of Universal Credit introduced at start of pandemic was withdrawn.
3. The most vulnerable will be hit worst by cost pressures. The published inflation rate is an average disguising how rising prices are distributed across items. Inflation in energy and food is especially high, and this exacerbates existing income inequalities since poorer households spend a greater proportionate share of income on these items. The Institute for Fiscal Studies calculated that the May 2022 average inflation rate of 9.1% materialised as an actual rate of 10.9% for the poorest 10% of households but only 7.9% for the richest 10%. In August, the IFS updated its inflation figure for the poorest households to 18%.
4. The impact of rising prices on vulnerable people is already visible and pre-dates the highest inflationary figures. In April 2022, the Money Advice Trust noted that one in eight UK adults reported having gone without heating, water, or electricity in the past three months to manage costs. Increased energy use (and therefore costs) over the colder winter months is likely to increase the numbers of

¹ Generally due to an inability to work resulting from disability, old age, caring duties, or ill health.

² The annual uprating is determined by the inflation rate in the previous September.

households living in fuel poverty³. Emerging data indicates a growing number of people in payment arrears to their energy provider even before winter. This is likely to increase the number of households moved onto pre-payment meters (commonly used as a debt management tool) which are generally much more cost-intensive since outgoings cannot be smoothed over the course of the year as they can through direct debit payment.

5. There was a 5.9% increase in grocery prices from April 2021 to April 2022. Food insecurity⁴ was reported as 20% higher in January 2022 than in the previous 6 months and to affect 4.7m adults (Food Foundation data). By May 2022 YouGov reported that 7.3m adults had been forced to reduce their food purchases or had missed meals despite being hungry.
6. Rising cost pressures coincide with an increase in the absolute numbers of people living in poverty. The usual UK poverty measure is where household income is less than 60% of median levels after housing costs. Joseph Rowntree Foundation⁵ has looked at those living with incomes below 40% of median levels after housing costs and noted that between 2002-03 and 2019-20 this number had increased from 4.7m to 6.5m. JRF highlighted particularly increased poverty risks for disabled people or families with a disabled family member and for lone-parent families.
7. High inflation also comes at time of economic vulnerability for many households. Around 20% of UK adults have less than £100 in savings and in March 2022 StepChange (a debt charity) reported that more than 1 in 5 people expect to be driven into problem debt over the year with 31% expecting to struggle to pay for essentials such as healthy food and weather appropriate clothing.
8. There is evidence of growing reliance on unsecured credit to cover essential living costs. In January 2022, the Office for National Statistics reported that almost 1 in 8 people surveyed said they were using more credit than usual because of rising living costs. Consumer borrowing costs reached a monthly total of £1.5bn in February, the highest since records began in 1993. Low-income households are generally excluded from mainstream credit provision and disproportionately reliant on high interest 'buy now, pay later' providers or illegal credit from loan sharks. Low-income households risk entering debt-traps where further credit is needed to service the costs of existing loans.

Impacts on the charitable sector

9. The sector started this economic downturn in a weak position, with Covid 19 having depleted reserves. A Charity Commission survey from October 2021 found that two thirds of organisations expected a threat to their own viability in 2022. Over the coming months, officers expect that charities will continue to face rapidly rising demand for services and a squeeze on the inputs that enable them to deliver their services.

³ Defined as those spending more than 10% of income on energy bills

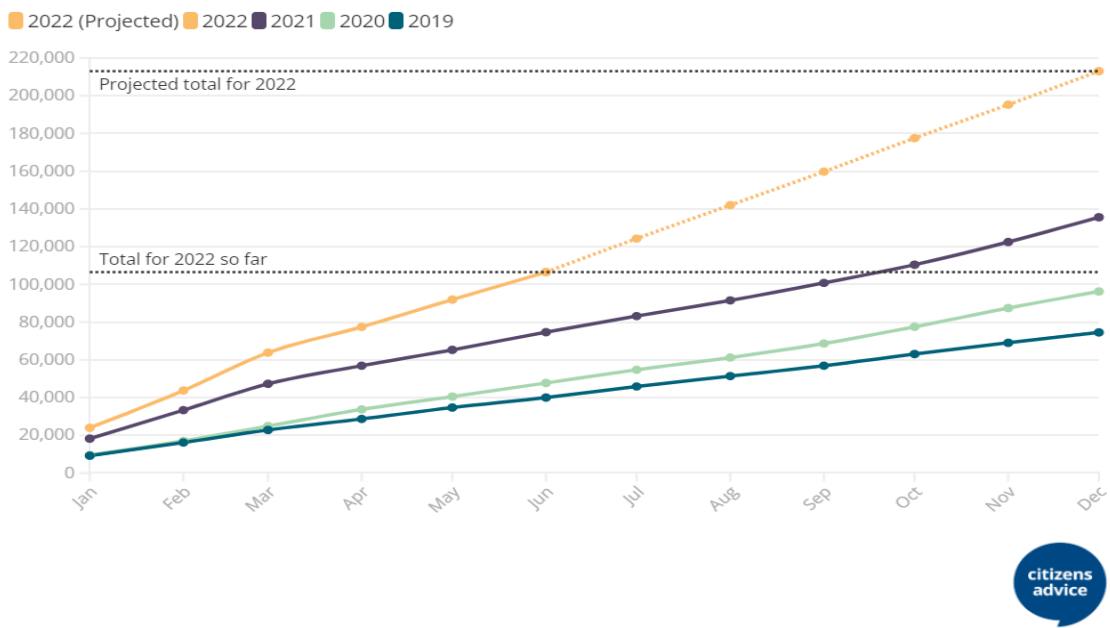
⁴ Defined as going at least one day without eating because food is either not affordable or not accessible

⁵ "Going without: deepening poverty in the UK" (July 2022)

10. Higher inflation results in higher cost pressures. Whilst Government's most recent support package will help, winter will bring larger utility bills and (where relevant) travel and transportation costs. This will increase overhead costs at the expense of service delivery and/or reserves. Additionally, inflationary pressures will erode the value of any pre-existing grants and contracts.⁶
11. There is emerging evidence of reduced donation levels. Early 2022 data from Charities Aid Foundation found 60% of people were planning to cut discretionary spending and there were 2m fewer people donating to charity than the long run average. This trend could be accelerating. An August 2022 survey from GOOD Agency and YouGov reported that three times more people planned to reduce their charitable giving, compared to those who intend to give more. The Trussell Trust, a CBT grantee supporting 1,400 food banks, reported an increase in the demand for food parcels whilst public donations of food (itself a product of price pressures) are falling.
12. New Philanthropy Capital (a think tank and consultancy) states *"More people will need the help charities provide, yet charities will find it harder to support them as inflation increases their own costs and erodes the value of reserves and pre-pledged donations"*. Rising service demand means rising costs, but unlike commercial firms, charities cannot generally pass these costs on to their clients.
13. Data shows growing demand for charitable advice services, support with food, and increased need for affordable credit. In late July 2022, Citizens Advice reported that it had supported 120,000 people with access to foodbanks and other charitable support, more than the numbers for 2019 and 2020 combined (see chart below). The charity noted that disabled people are among those most likely to be seeking support for cost-of-living issues.
14. The Citizens Advice network reports more people approaching it in July 2022 than in January because they were unable to afford to top up their prepayment meter. In the year to date, the charity has supported over 47,600 people with energy debts, with the average client more than £650 in arrears to their energy company. Whilst fuel advice could previously look at options to manage increased bills by switching providers, consumer flexibility is constrained by the closure of 28 suppliers in recent months (which in turn has pushed up energy bills to cover losses).

⁶ Pro Bono Economics calculates that (at current rates) a grant of £100,000 awarded in 2021 would only be worth £88,100 in 2024.

Cumulative number of people Citizens Advice has helped with crisis support each year



15. Community credit providers deliver flexible and supportive finance to those who are otherwise unable to access commercial provision. Whilst this can be people receiving benefits, there is also growing reliance on credit from those with variable incomes (i.e. 'gig' workers). Typically, users would not have access to overdrafts or credit cards from high street banks. Credit helps support with emergency or unexpected payments beyond budget such as repairs to broken white goods or purchase of school uniforms. This can be especially important where households cannot afford insurance and where people would otherwise need to spread the cost of expensive items over months using high-interest credit from retailers. The 'poverty premium' refers to the higher prices people in poverty must pay for goods and services compared to those on higher incomes. Whilst the total value of loans from community credit providers are at an all-time high, their own lending capacity is constrained by their own capitalisation and is unlikely to be able to meet demand in the months ahead.

16. Advice, food, and credit have been some of the earliest impact indicators in the sector, but CBT expects to see consequences across a wider range of social issues. Officers have spoken to domestic violence charities who anticipate an increase in reported cases, and mental health specialists who expect greater demand for their services. Organisations supporting migrants with no recourse to public funds are seeing increased destitution. There are concerns across our funded caseload of pressures on staff to meet increased demand when organisational income is highly stressed and how this will risk burnout amongst staff already stretched by the impact of the pandemic.

Options for charitable funders

17. The scale of inflation requires significant statutory action across policy, money, and taxation, but charitable funders such as CBT can also play a vital role in mitigating some of the worst impacts of the economic pressures in the months ahead.

18. To manage charity time and administrative efficiency, funders should ensure grant and social investment opportunities are accessible and applications are considered on a timely basis. Support should be awarded to cover the full costs incurred by organisations in service delivery, and these awards updated year on year to reflect the impacts both of inflation and increased demand. Where possible, funders should offer the greatest degree possible of in-grant flexibility to help grantees manage budgets.
19. Charities Aid Foundation has advised donors to top up existing donations and New Philanthropy Capital has also called on funders to offer uplifts to new and existing grants (especially if multi-year awards apply) where budgets were agreed before recent inflation data.
20. Sector-focused think tanks have also called for funders to remove grant restrictions wherever possible, to look at how they can speed the assessment process, and to collaborate with each other on a wider response (as the funding community did during the pandemic).

Current position

21. CBT's main funding interventions for household cost pressures remain its "Advice and Support" and "Food Poverty" programmes which were recently expanded to include fuel poverty, wider food provision, and regulated debt advice. Higher inflation has an impact beyond these areas and a wider response is needed.
22. In addition to our open funding programmes, officers are already doing the following to support the sector:
 - a. Funding on a full cost recovery basis so that awards include an appropriate share of organisational overhead.
 - b. Providing guidance for new applicants (since April 2022) acknowledging the high inflation environment and making explicit that officers will consider sympathetically annual cost increases based on expected inflation.
 - c. Discussing budget revisions with current applicants to better reflect the expected costs of delivery (noting that inflation does not apply equally across all cost lines).
 - d. Allowing virements between budget lines within existing grants to cover cost pressures.
 - e. Working to ensure that grant decisions are made within published turnaround times.
 - f. Acting as a Living Wage Funder⁷.
 - g. Offering capacity building to the sector via the Bridge Programme.
 - h. Engaging with other funders, bilaterally and via our membership bodies London Funders and ACF, to share and develop ideas for action.
23. Over the coming weeks officers will be conducting an end-to-end review of our application processes to simplify and streamline these wherever possible and reduce the time-burden on organisations. The website refresh will make information about our funding more accessible, and officers are conducting

⁷ <https://www.livingwage.org.uk/living-wage-funders>

borough speaking engagements to promote our grants. Officers are also exploring options to work with partners on emergency grants during the winter period.

Recommendations

24. Most organisations that CBT supports have paid staff, hold grants (and sometimes statutory contracts) that are not subject to inflation adjustment, do not have excessive reserves, and generally do not hold endowment investments. All CBT grantees undergo thorough due diligence before awards are recommended, with proposed costs proportionate both to the scale of work that will be delivered and the needs of the applicant organisation.
25. Since late April 2022 CBT Funding Managers have had discretion to recommend additional funds to new applicants if (in their view) the organisation had not included sufficient provision for inflation. Applications received up to this date were generally based and awarded on a 2% annual inflation rate.
26. Officers expect most organisations funded through our open programmes to experience increased demand and increased cost pressures during 2022-23 so officers recommend additional support to existing grant-holders who did not benefit from the flexibility offered to applicants from late April onwards.
27. There is precedent here of a general award scheme for changing circumstances. At the March 2020 meeting City Bridge Trust Committee agreed a programme of one-off unrestricted grants to ensure the resilience of grantees managing the impact of Covid and lockdown restrictions. CBT received very positive feedback from the sector on this additional funding.
28. Officers recommend an approach which is as cost and time efficient as possible both to Bridge House Estates as a charity and to recipient organisations by awarding one-off unrestricted grants for to selected grant holders, based on 10% of the funding due over the coming 12 months. Awards would be for:
 - a. Organisations funded under the Trust's open programmes.
 - b. Current grant-holders whose awards were made on or before 1st May 2022.

Officers would prepare a list from the grants' database, and names would be checked by the Funding Managers in case there were exceptional reasons *not* to award the proposed sum (for example, active compliance concerns or notable underspends). Awards would be pro-rated for those organisations with less than 12 months remaining on their funding agreements.

29. Officers acknowledge that different grant-holders will experience different inflation rates over the coming months but recommend a common approach rather than something fine-tuned to each grantee. Tailoring would require considerable staff time in analysis of hundreds of individual awards and potentially only result in minimal adjustments. Officers believe there are few charities in the portfolio which will not require additional support in the months ahead, and the proposed amount for each grantee is relatively low. As such the risk, on a per grant basis, is also low.

Officers have developed this proposal in consultation with the Charities Finance Team who are supportive.

30. The total cost of the programme on the basis above could be £3.5m. This figure is based on the best available data when preparing the 2021-22 draft accounts, but with the caveat that this would need to be tallied against the grant-making database to confirm the final amount. Given the level of inflation and the scale of need, officers do not think a contribution from CBT would overlap with what other funders might provide nor negate the need for their support. Subject to the approval of the overall proposal, officers could liaise with the Chair and Deputy Chair of the Grants Committee on the final figure.
31. In addition to the programme of one-off grants, officers propose to explore work with relevant bodies to address food and fuel poverty across London and look at ways to support the work of London-focused responsible low-cost community lenders (Community Development Finance Institutions) to examine how CBT might boost flexible credit facilities for the most vulnerable. These proposals would come back to the Grants Committee for approval.

Conclusion

32. The proposed work is to help portfolio grantees manage cost pressures and to provide 'equality of treatment' between those currently under assessment (who would be expected to include high provision for inflation) with those current grantees (who based their applications on a 2% rate). Officers expect there will be further statutory and charity sector announcements about support packages and, where relevant, CBT officers will engage. In the meanwhile, officers will explore scope to develop specific interventions addressing food, fuel and credit poverty in London for submission to a future Grants Committee.

Appendix

- Appendix 1 - Disproportionate impact of rising costs of living on CBT grant-holders

Tim Wilson

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DISPROPORTIONATE IMPACT OF RISING COST OF LIVING ON CBT GRANT-HOLDERS

Organisations

Londoners

Costs Increasing

The effective inflation rate for London is higher than the rest of the UK. Everyone in London is facing high price rises for food and services. Rents (especially private rents) are increasing faster than anywhere else in the UK [1]

Purchasing Power Reduced

Grants budgets are set at the start of the award term - high inflation means this money won't go as far

Vulnerable Londoners Left Behind

13% of Londoners are going without basic essentials [2]. Additional Government support packages are not available for all - e.g. Refugees with No Recourse to Public Funds [3]

Increased Demand From Service Users

"We thought we were going to have the sharp increase in demand over the autumn & winter this year. But it's already started over the summer, so people are very, very worried." Latin American Women's Rights Service

Needs Increase

"The cost of living crisis and other events have taken a high toll on victims of domestic abuse and our frontline staff that support them. Rising numbers of women are presenting with very poor mental health" Hestia Housing and Support

Legacy of Pandemic Pressures

"For families living in poverty in London the cost of living crisis is further exacerbating the inequalities exposed by the pandemic." Children England

"The clinical supervision that we doubled during the pandemic has gone back down to pre pandemic levels and even a little bit lower because we're struggling to find that money" Latin American Women's Rights Service

References

- 1) <https://www.london.gov.uk/press-releases/mayoral/londoners-are-worst-affected-by-soaring-inflation>
- 2) <https://londonfunders.org.uk/resources-publications/tools-funders/data-insights-cost-living-crisis>
- 3) <https://www.london.gov.uk/press-releases/mayoral/cost-of-living-crisis-deepens-for-thousands>

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Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: Alliance Partnerships Update	Public
Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> does this proposal aim to support?	1,3
Which outcomes in City Bridge Trust’s funding strategy, <i>Bridging Divides</i>, does this proposal aim to support?	Reducing inequalities, Every Voice Counts.
Does this proposal require extra revenue and/or capital spending?	No (£3m allocation recommended from BHE unrestricted income funds – designated fund for grant making)
Report of: David Farnsworth, Managing Director, BHE	For Decision
Report Author: Sam Grimmett Batt, Funding Director	

Summary

This report provides an update on the Alliance Partnerships programme of work. It reflects on the success of the programme to date and the quality of the potential collaborative grants pipeline. It concludes with a request of an additional, in principle allocation of a further £3M towards the programme (bringing the grand total allocation to £18m). Grants awarded under the allocation will be subject to the usual assessment (including financial assessment) and delegated authority protocols. There are sufficient funds within the BHE designated fund for grantmaking, and the budgeted spend for 2022/23 and 2023/24, for the proposed additional allocation and any consequential grantmaking.

Recommendation

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity’s best interests:

- i) Agree to allocate, in principle, a further £3m of the designated unrestricted income fund for grant making towards “Alliance Partnerships” which meet the criteria set out in this report (bringing the grand total allocation to £18m).

Main Report

Background

1. It has widely been agreed across the funding sector that collaborative funding approaches are required for a thriving civil society and should form a healthy part of

the overall funding ecosystem. Reports by London Funders¹, ACF², IVAR³, and CBT's own commissioned reports from learning partner Renaisi⁴ have consistently recommended that independent funders with the ability to work collaboratively, should do so as far as possible.

2. In December 2021, the Grants Committee agreed to allocate £15m towards a collaborative initiative to award grants to established fellow funders, primarily for the purpose of onward grantmaking. The onward grants were to be made under defined grant programmes which were well aligned with CBT's own funding strategy.
3. Whilst there was existing precedence for funding in this way in the past, CBT had not previously contributed to the onward grants budgets of other funders at such scale.
4. These "Alliance Partnerships" (originally named "the Alliance Fund", but later renamed) sought to expend some of the identified uplift in funds in a manner which maximised collaborative, leveraging, and catalysing potential, as well as applying lateral thinking to utilise the uplift in the most efficient way possible, reducing the need to temporarily increase staffing.
5. The criteria for Alliance Partnerships are as follows:

"Alliance Partnerships will be awarded in order to advance the mission and vision of the Bridging Divides Strategy, and usually will not be awarded to augment the "business as usual" day to day operations of other funders. Key features of recommendations for Alliance Funding will include:

- a. The funds will be awarded to 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. The funds will be awarded towards grant programmes which are in development, or recently begun, and which have a finite end point (this could include phased initiatives).
 - c. Initiatives to be funded must 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. Evidence can include expertise by experience, including direct/lived experience.
 - d. The organisation receiving funds must be able to adequately ring-fence funding for onward distribution to work which benefits Londoners."
6. Since then, £12.2m has been awarded towards such partnerships (**see Appendix 1**) leaving £2.7m remaining. Additionally, the reports today include a £2m recommendation to Comic Relief. Should this be endorsed by the Grants Committee and approved by the BHE Board, approximately £690k of the original £15m allocation will remain.

¹ [London Funders, 2021: London Community Response Learning Reports](#)

² [ACF, 10 Pillars of Stronger Foundations](#)

³ IVAR, 2016: [Funder Collaboration: is it worth it?](#)

⁴ Various iterations have been included in papers over time, copy of most recent review available on request.

7. During the scoping period, officers investigated a number of different avenues and there are three potential high-quality Alliance Partnerships in the pipeline which could still be brought to fruition – these total a maximum of £3m (**see Appendix 2**). The Grants Committee’s agreement is sought to allocate a further £3m towards Alliance Partnerships, increasing the grand total of allocation to £18m, to allow officers to progress these discussions. Each potential partnership recommendation will still be submitted to the Grants Committee for approval or endorsement to the BHE Board following the usual protocols.
8. Through Alliance Partnerships, CBT has modelled a collaborative, generous approach to the wider sector, acknowledging that it does not always need to be leading initiatives, and can sometimes be most facilitative of the needs of Londoners by instead supporting simply with additional or matched funding.
9. Alliance Partnerships have allowed CBT to benefit from proximity to more expert and specialist funders, for example a CBT Funding Manager was able to observe the work of the Rosa assessment panel. Additionally, Rosa amplified a recent CBT recruitment advert, which led directly to an increase in the number of applications from women of colour.

Conclusion

10. Alliance Partnerships have provided a unique opportunity to expend uplift funds in a collaborative, collegiate manner facilitating the sustainability of civil society organisations, including fellow funders. It has demonstrated CBT’s commitment to funding work which meets its mission and values, regardless of whether CBT itself is in the driving seat of delivering the funding. Alliance Partnerships to date have provided excellent leveraging opportunities, with multiple other funders (from both the charitable and corporate sectors) also supporting the majority of the programmes supported. The Grants Committee approval of a further £3m towards Alliance Partnerships will allow three further potential awards to be explored, directing funding towards three areas which are less well represented in the programme so far: young people experiencing homelessness (not yet expressly supported), women and girls (one other grant is explicitly focused on women and girls), and human rights (not yet addressed explicitly). This will bring the total number of awards to ten, with a well rounded and diverse range of focus.

Appendices

- Appendix 1 – Alliance Partnerships summary update
- Appendix 2 – Alliance Partnerships pipeline

Sam Grimmitt-Batt

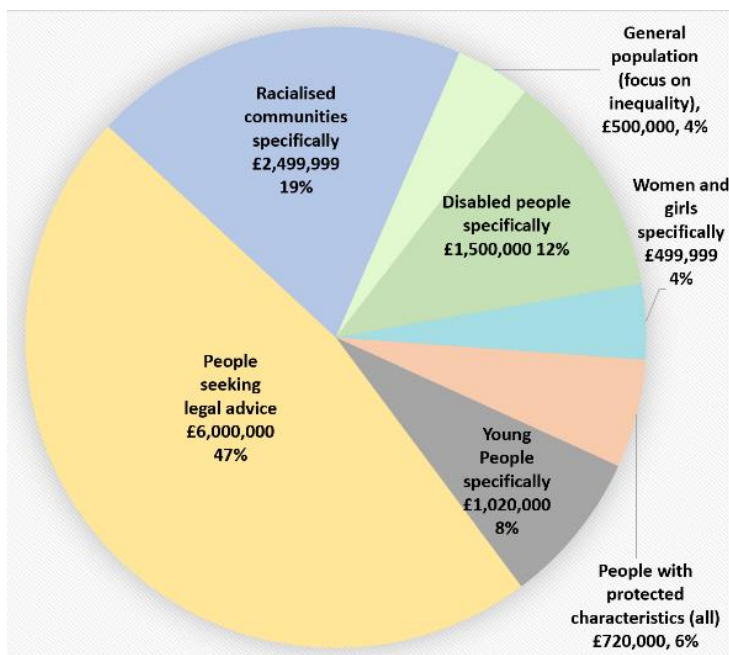
Funding Director

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Appendix 1: Alliance Partnerships awarded to date, summary, distribution and update

Name	Initiative	Amount
Rosa	Rise Programme	£499,999
Greater London Authority	Civil Society Roots 3	£720,000
John Lyons Charity	Local communities in specific boroughs ⁵	£1,020,000
United Saint Saviours Charity	Local Communities in Southwark	£500,000
Trust for London	Racial Justice Fund	£2,000,000
Trust for London	Disability Justice Fund	£1,500,000
London Legal Support Trust	Advice Services Development Fund	£6,000,000
Total		£12,239,999
Previously allocated		£15,000,000
Recommended		£2,069,375
Remaining allocation		£690,626

Distribution of funding (total amount) by communities ultimately supported:



⁵ JLC works in Barnet, Brent, Camden, Ealing, Hammersmith & Fulham, Harrow, Kensington & Chelsea, and the Cities of London and Westminster.

Name	Update
<p>Rosa, £499,999 (Dec 2021)</p>	<p>The Rise Fund offered two-year grants of up to £40,000 to Black and minoritised-led women's and girls' organisations in the UK which have been established for three years or more, and which have an average annual income of less than £100,000 per year. 35 projects were approved by the panel, of which 16 were in London. City Bridge Trust monies were fully spent, with grant award payments made in July 2022. Example of a funded project:</p> <p>CAME Women and Girls Development Organisation is charity in Ealing that is dedicated to improving the safety and livelihood of women and girls, predominantly from Black African backgrounds. It received a £30,000 grant for organisational development, including staff training and strategic development.</p>
<p>Greater London Authority £720,000 (Dec 2021)</p>	<p>Civil Society Roots 3 will distribute £1.1m to organisations led by and for the following named protected characteristic groups impacted by structural inequalities: Black, Asian and Minority Ethnic Londoners, Disabled Londoners, LGBT+ Londoners, Women and Older Londoners, in 10 'cold-spot' boroughs. Impact grants of up to £50k and development grants of up to £5k will strengthen the roots of 'community-led' civil society by supporting these target groups to strengthen their relationships, networks and collective advocacy voices. 'Frontline' delivery projects are not eligible for this fund.</p> <p>The first round saw £500k distributed to 31 organisations including a £50,000 grant to user-led deaf and disabled organisation Bromley Experts by Experience, which will support the organisation to convene impairment-specific groups to raise collective voice and support local campaigning efforts.</p> <p>In Spring 2023, the second round will see a similar amount distributed.</p>
<p>John Lyons Charity (JLC), £1,020,000 (Feb 2022)</p>	<p>Contribution to the Home-School-Community Recovery Fund, aimed at ensuring organisations working with young people in and across these three settings have the capacity to survive and flourish. Following development work, the onward grantmaking period began on 1st September 2022. JLC is finalising the priorities of the programme and expects that the first grants will be awarded at JLC's next board meeting in November.</p>
<p>United Saint Saviours Charity,</p>	<p>Local grant-making in Southwark directly as a response to increased need following the impact of Covid 19 (this programme received double the number of applications compared to the previous round in 2021/22).</p>

<p>£500,000 (2022)</p>	<p>£200,000 has been committed to date in year one. 11 organisations were awarded large grants and 28 received small grants. Additionally, £50,000 has been committed under USS's (invitation only) Strategic Grants Programme. This is part-funding two initiatives to address the costs of living impact for more vulnerable residents in Southwark.</p> <p>Example grant: Step Now a CIC set up by a group of young Black professionals in 2019. The aim of this small but growing enterprise is to educate, mentor and empower the next generation of leaders, providing them with life skills to successfully transition into adulthood, using their own lived experience to deliver and engage relatable interventions. The grant is funding 'Pattern Your Future' - a pathway to employment and career exploration programme, which is followed by a further set of 6-weeks of career coaching sessions.</p>
<p>Trust for London (Racial Justice Fund), £2,000,000 (Feb 2022)</p>	<p>Match funding for a dedicated new Racial Justice Fund focused on wealth and income disparities and the clear link between race and poverty in the UK.</p> <p>The Racial Justice Fund will support work which facilitates Black and minoritised communities with access to the power and resources needed to create economic wealth. Grants will be awarded for up to five years and development grants, and flexible funding for core and/or project funding will be available.</p> <p>There are two stages to the application process: Expression of Interest (now closed), followed by shortlisted applicants being directly invited to apply (underway currently).</p>
<p>Trust for London (Disability Justice Fund) £1,500,000 (Feb 2022)</p>	<p>Match funding to fund DDPOS (Deaf and Disabled People's Organisations) through a dedicated new fund. By directly resourcing DDPOs, the funding will support these groups to be more effective, powerful, inclusive and sustainable.</p> <p>The fund has been designed in collaboration with Deaf and Disabled activists, and builds on learning from Stronger Voices, Realising Rights (SVRR), an initiative set up in 2018 (also co-funded by CBT) to support Deaf and Disabled people's rights and inclusion.</p> <p>The fund will support a range of DDPOs including small organisations and those working across intersections of injustice – for example groups for LGBTQ+ Disabled people – to strengthen their collective identity and capacity to mobilise for change.</p> <p>Applications launched on 6th July, with a closing date of 3 October 2022.</p>

<p>London Legal Support Trust £6,000,000 (June 2022)</p>	<p>Awarded June 2022, £6m over five years towards onward grant making under the Advice Skills Development Fund (ASDF) (approximately £5.2m of the £6m), 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).</p> <p>Still under development as it will likely be delivered under the Collaborative Action for Recovery Programme.</p> <p>The steering group met recently to agree priorities, and it is hoped that initial applications will launch in October 2022. A CBT officer will sit on the advisory panel (an officer already sits on the steering group).</p>
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Appendix 2: Alliance Partnerships pipeline

Name	Initiative	Potential amount (up to)
BBC Children in Need	Young People	£1,500,000
Smallwood Trust	Women and girls	£780,640
Baring Foundation	Human Rights	£1,237,711
Total		£3,518,351
Less: Remaining amounts from original £15m allocation		(£690,626)
Maximum additional allocation of designated funds required		£2,827,725

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Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: BHE Grants Committee – Officer Delegations	Public
Which outcomes in the BHE Bridging London 2020 – 2045 Strategy does this proposal aim to support?	1
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 Director’s Office	

Summary

To support the efficient and effective delivery of BHE’s activities in furthering its ancillary object, there has been an established and documented practice of delegating authority for certain grant decisions to officers. This is in line with good practice in charity administration and the City Corporation’s governing framework.

At its meeting in December 2021 the Grants Committee of the Bridge House Estates Board (“Grants Committee”) and the BHE Board in January 2022 agreed to endorse a trial process which involves additional written consultation with the full Grants Committee in the exercise of officer delegated authority for all grants of a value between £100,001 and £250,000.

It was agreed that these arrangements be implemented, but subject to review after a trial period lasting two committee cycles to determine whether it has been successful. It was agreed that the Grants Committee Chair and Deputy Chair would consider the process in place and any feedback received to inform recommendations as to whether the arrangements should be implemented on a permanent basis or if any changes should be made with recommendations being made to the BHE Board for approval and onward to the Court, as required.

This report requests that the Grants Committee review the trialled process and consider whether to recommend to the BHE Board that the arrangements should be implemented on a permanent basis; or decide that the process revert to not requiring written consultation with full committee at this level of delegation.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity’s best interests:

- i) Review the current officer delegations process involving the full Grants Committee by written consultation in the exercise of officer delegated authority for grants of a value of between £100,001 and £250,000;
- ii) Consider whether or not written consultation with the full Grants Committee in the exercise of officer delegated authority for all grants of a value between £100,001 and £250,000 should be recommended to the BHE Board for adoption within the officer delegated authority framework on a permanent basis.

Main Report

Background

1. At its meeting in December 2021 the Grants Committee, and the BHE Board in January 2022, agreed to endorse the following trial practice in the operation of the delegated authority approval process for grants of a value between £100,001 and £250,000:
 - a) the full Grants Committee shall be consulted in writing on the decision prior to the exercise of the Chief Officer's delegated authority;
 - b) should any Member have a comment on the application to be considered, this should be forwarded directly to the Chair/Deputy Chair of the Grants Committee within 48 hours of the email being sent; and
 - c) the Chair and Deputy Chair of the Grants Committee have the authority to reject or accept any comments from the wider Committee as part of the decision-making process.
2. The Grants Committee agreed that this trial practice be adopted for two Committee cycles and then it be reviewed with the findings being reported back to the Grants Committee; hence this report.

Delegated Authority administration process

3. By way of background, under the current trial, the end-to-end process that the Funding Officer team follow to process a delegated authority decision of a value between £100,001 and £250,000, once the grant application assessment has been completed, is as follows:
 - a) Funding assessments recommended for approval or rejections between £100,001 and £250,000 are first sent to the Managing Director and Associate Director for approval (over email).
 - b) For grants recommended for approval or rejection a copy of the Funding Assessment is sent to the Chair and Deputy Chair, cc'ing the full Grants Committee, providing a 48-hour window for comments to be sent directly to the Chair/Deputy Chair for consideration.
 - c) The Chair and Deputy Chair consider any comments received and ask any pertinent questions to the Funding Team. A single response, consolidating all responses to questions is returned, generally within 48 hours (depending on staff availability).
 - d) Grants and rejections are subsequently approved or rejected by the Chair and Deputy Chair by email.
 - e) Grant offer/rejection letters are prepared, sent to the Funding Managers for approval and despatched via DocuSign to the applicant.

Review of Current Arrangements

4. The trial arrangements commenced on 25 April 2022. An overview of how many grant assessments and rejections have been managed under this new process can be found below:

- a) Between 25 April 2022 and 30 August 2022, 19 grant recommendations of between £100,001 and £250,000 were sent for approval under delegated authority.
 - b) Six recommendations for rejection of requests between £100,001 and £250,000 were sent for approval under delegated authority.
5. It is understood that during the trial, there has only been one specific query raised by one Member of the wider Grants Committee on the grant assessments or rejections, sent directly to the Chair and Deputy Chair.
 6. Comments on the trial drawn together from experiences of the Funding Officer team who manage the Delegated Authority administration process focus on two areas:
 - a) Firstly, the process of seeking comments from the full Grants Committee adds an extra layer of administration to the approval process, which involves additional Funding Officer time and resource;
 - b) Secondly, from the applicant point of view the additional consultation process prolongs the decision-making process.
 7. In addition to the officer comments, this Committee is reminded that the BHE Board has previously endorsed increased delegations to Officers to support effective and efficient decision-making processes within the charity. The above trial process does not necessarily align with the position that the Board has taken on increased delegation levels.
 8. It should be noted that if the recommendation of this Committee to the BHE Board is to implement the trial practice on a permanent basis and the BHE Board concurs, this would require onward approval to the Court of Common Council. The reason for this is that the trial process is inconsistent with the Court's current written corporate governance procedures: current procedures require Members of a Committee to meet to collectively take decisions; and officers, when exercising their individual delegated authority between meetings of a Committee, consult with the Chairman and Deputy Chairman. Written consultation with a full Committee on delegated matters is currently usually only by exception. Charity delegation frameworks should be clear, transparent and in writing, and thus permanent implementation of the practice would need to be reflected in a change to the City Corporation's written corporate governance and delegation framework.

Conclusion

9. This report sets out how the trial additional consultation layer worked in practice. It is for Members to consider whether they wish to recommend to the Board to make the measures permanent (noting that onward approval of the Court would be required to effect the changes to the City Corporation's written corporate governance framework) or whether they wish to revert to this additional consultation layer not being required.

Background reports

- Report to the BHE Board, entitled BHE Grants Committee – Officer Delegations, dated 11th January 2022.
- Report to the Grants Committee, entitled Grants Committee – Officer Delegations, dated 6 December 2021.

Scott Nixon

Head of Managing Director's Office

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Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: Budget monitoring report for BHE Funding: period ended 31 July 2022.	Public
Which outcomes in the BHE Bridging London 2020 – 2045 Strategy does this proposal aim to support?	1, 2, 3
Report of: Karen Atkinson, The BHE & Charities Finance Director (representing the Chamberlain)	For Information
Authors: Helen Martins, Business Partner: Grant Funding, Philanthropy & Communications Dinah Cox, Associate Director, City Bridge Trust (CBT)	

Summary

This report provides the year-to-date financial position as at 31 July 2022 of BHE Funding Activity and an updated forecast for the financial year ending 31 March 2023.

The latest approved budget is £107.4m comprising of £103.2m allocated to Grant Commitments & Related Income and £4.2m (net of income) to operational costs. The updated grants forecast is £55.6m; reflecting a decrease of £46.9m below original budget. The reduced forecast spend arises due to delays in anticipated grant commitments across various strands, including the Anchor Programme, Collaborative Action for Recovery and Grants Test and Discover. Full details are provided at paragraphs 14 to 17 of this report.

Recommendation

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Note the contents of the report.

Main Report

Background

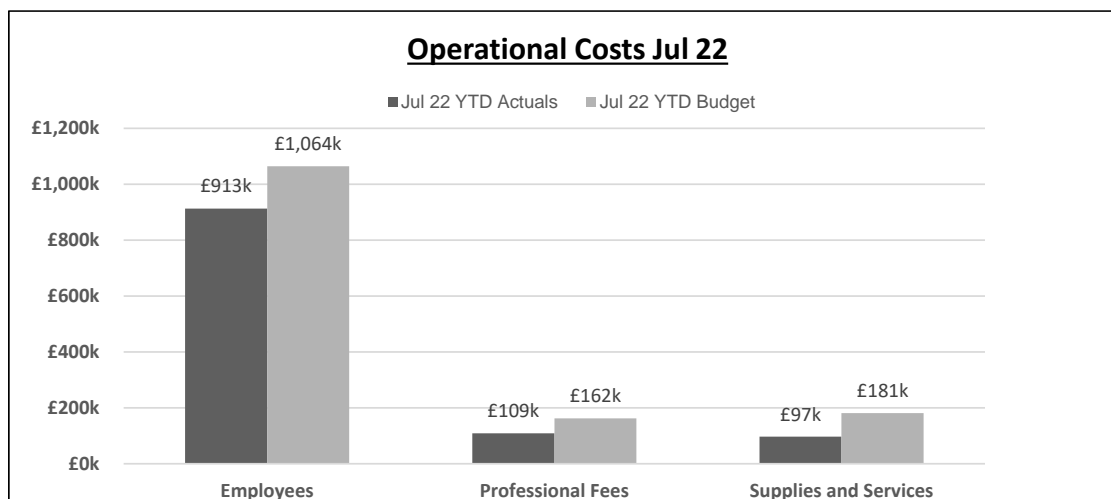
1. In support of the budget monitoring oversight responsibilities of the Grants Committee of Bridge House Estates Board (the Grants Committee), this report presents a financial update on funding activities and the most recent financial forecast for the year.
2. BHE holds a grant-making designated fund which represents surplus income set aside for funding grant-making activities in the name of City Bridge Trust (CBT). At the beginning of the year, the unaudited grant-making designated fund was £210.3m.
3. Table 1 below provides an overview of BHE Funding's financial results as at the end of July 2022 and a forecast position for the 2022/23 financial year as compared to the annual budget.

Table 1: BHE Funding's Actual Spend v Budget

	Year to Date 31 July 2022			Annual - 2022/23		
	Actual £'000	Latest Approved Budget £'000	Variance £'000	Forecast Outturn £'000	Latest Approved Budget £'000	Variance £'000
Operational Costs						
Employees	(913)	(1,064)	151	(3,213)	(3,279)	66
Professional Fees	(109)	(162)	53	(428)	(435)	7
Supplies and Services	(97)	(181)	84	(521)	(479)	(42)
Total Expenditure	(1,119)	(1,407)	289	(4,162)	(4,193)	31
Income	48	24	23	358	286	72
Total Operational Costs	(1,071)	(1,383)	313	(3,804)	(3,907)	103
Grant Commitments & Related Income						
Grants	(15,100)	(17,290)	2,189	(55,630)	(102,530)	46,900
Non-Grant expenditure	(41)	(243)	200	(559)	(940)	381
Depreciation	(6)	(6)	-	(19)	(19)	-
Social Investment Income	68	37	29	187	165	22
Grants Income	-	-	-	100	100	-
Total Grant Commitments & Related Income	(15,079)	(17,502)	2,423	(55,921)	(103,224)	47,303
Recharges	-	-	-	(340)	(340)	-
Total Net Expenditure	(16,150)	(18,886)	2,736	(60,065)	(107,471)	47,406

Operational Costs

4. The graph 'Operational Costs Jul 22' shown below, compares the year-to-date (YTD) spend and budget for Operational Costs.



Employee Costs

5. The year-to-date underspend of £151k on employee cost is due to some vacant posts, notably Capacity Building Manager and a Social Investment Associate. Funding Directors are currently reviewing overall workload and resource requirements. The Social Investment Associate role will be reviewed following the implementation of the powers granted within the Supplemental Royal Charter.
6. Employee costs is currently forecasted to be underspent due to the vacant posts mentioned in paragraph 5 not filled at the start of the financial year. An updated forecast will be available to this Committee following the Funding Directors workload and resource planning identified in paragraph 5.

Professional Fees

7. The Professional Fees underspend as at 31 July 2022 was £53k. Fees earmarked for the Philanthropy House proposal and the Social Investment Fund are yet to be incurred due to reasons as outlined in paragraphs 8 and 9 below.
8. The Philanthropy House project is currently on hold whilst the co-location rental market settles down post covid. At present there are no concrete plans around the budget allocated for research, but these are likely to take shape this autumn. Any impact of inflation will need to be considered in future business modelling.
9. The Social Investment Fund remains closed to new proposals pending the development and presentation of future plans to the BHE Board for approval. This is dependent upon the development of the new BHE Investment Strategy Statement, being led by the BHE Investment Working Group. The portfolio balance has required minimal cost to manage, hence the limited spend shown in the year to date.

Supplies and Services

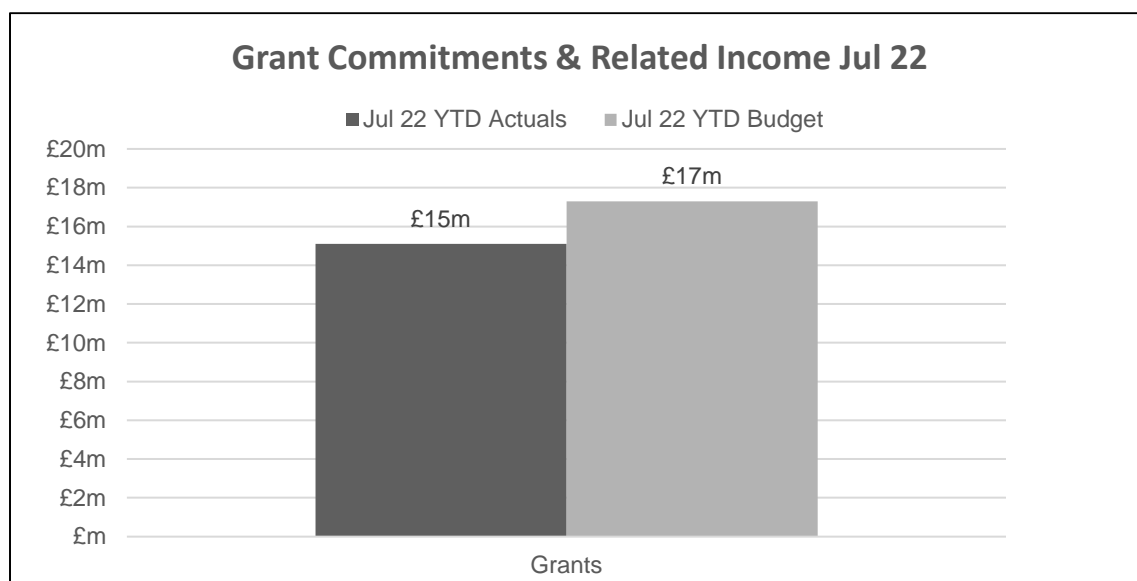
10. The £84k underspend in Supplies and Services is partly due to delays in events taking place. Events are now scheduled to take place later in the year. Website costs are billed in stages and are £50k adrift from budgets for the first four months of the year. With the website expected to go live in November 2022, officers would see an increase in spend as reflected in the forecast.

Income

11. As we recover from the pandemic, activity at Wembley National Stadium has returned to full capacity. This has seen actual income higher than budgeted as the contract in place reverts to its previous basis of level of time being incurred and recharged.
12. Full year income of £358k includes the expected recharge due to CBT for the support provided to the Central Grants Unit.

Grant Commitments & Related Income

13. The graph 'Grant Commitments & Related Income Jul 22' shown below compares the year-to-date (YTD) commitment and latest approved budget for Grants.



Grants

14. Grant commitments and associated costs are £15.1m at the end of July 2022, an under spend of £2.2m in comparison to budget.

15. Following review, these commitments for the year are now forecasted at £55.6m, a reduction of £46.9m compared to budget, with these now deferred to be committed across the next three financial years. This is due to delays across various strands, including the Anchor Programme where, following consultation with the sector, the start date for funding commitments has been pushed back.

16. The launch of the Collaborative Action for Recovery has fallen behind due to the time taken to build funding plans and to appoint partners taking longer than anticipated.

17. The Grants Test and Discover strand spend is deferred with further internal planning being undertaken as to how this programme is to be resourced.

18. Detailed analysis of the grants budget can be found within Appendix 1 of the Grant Funding Activity Report (Item 16 on the agenda).

Social Investment Fund

19. Income on Social Investments year to date as at 31 July 2022 was £68k against a budget of £37k due to ongoing residual income received from one of its investment which had not been previously anticipated.

20. The forecast increase is due to the interest rate increasing on two investments with rates linked to the Local Housing Allowance (LHA) rate which increased in the year, giving a favourable variance of £22k.

Grants Income

21. Grants income of £100k is the final instalment expected from Trust for London as their contribution towards the Cornerstone programme.

Depreciation and recharges

22. The charge for depreciation represents a general allocation to CBT of depreciation on the Guildhall facility.

23. Recharges include activities undertaken by the City Corporation on behalf of CBT, including recharges for human resources, digital services, committee administration and premises costs. These are accounted for at year-end.

Conclusion

24. Grant Funding commitments are significantly behind year to date against budget due to delays in a number of programme strands, as noted earlier within this report. This has resulted in a full year forecast reduction in expenditure of £46.9m, with the majority of the postponed spend now earmarked for the next three financial years.

Helen Martins

Business Partner – Grant Funding, Philanthropy & Communications

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Dinah Cox

Associate Director, CBT

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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
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Bridging Divides Programmes

Connecting the Capital	Positive Transitions	Advice and Support
Infrastructure funding: capacity building and representation.	Support for children and young people	Provision of advice and support to disadvantaged individuals
Increasing the quality and scale of giving	Support and services for older people	Food poverty
Place based giving schemes	Support services for Deaf and Disabled people	
Making London a greener city <ul style="list-style-type: none"> a. Revenue funding. b. Eco audits. c. Capital funding 	Support for refugees, asylum seekers and migrants to access mainstream services and widen community participation	
Access improvements to community buildings <ul style="list-style-type: none"> a. Access audits b. Capital funding 	Criminal justice: for those leaving custody or serving community sentences	
Voice & Leadership	Tackling abuse, exploitation and hate.	
	Mental health services	

Detailed criteria available on the website: [What we fund - City Bridge Trust](#)

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Committees: Grants Committee of the Bridge House Estates Board Bridge House Estates Board	Dates: 26 September 2022 Delegated Authority
Subject: Strategic Initiative – London Communities Emergencies Partnership (19111)	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., Connecting the capital
Does this proposal require extra revenue and/or capital spending?	No (£642,500 funding allocation from BHE designated grant making fund)
Report of: David Farnsworth, Managing Director of BHE	For Decision
Report Authors: Fiona Rawes, Philanthropy Director and Julia Mirkin, Funding Manager	

Summary

This report requests funding of £642,500 over four years (as per Appendix 1) for Greater London Volunteering (charity no: 1115303), a registered charity which is the legal entity for London Plus. The funding will support the establishment and operationalisation of the London Communities Emergencies Partnership (LCEP) as a strategic initiative. LCEP will be a partnership co-led by London Plus with the Voluntary and Community Sector Emergencies Partnership (VCSEP), and closely engaging a range of other organisations to enable stronger integration between funder, community, voluntary and faith-based organisations (FCVF) and the broader formal emergency preparedness and response architecture in London. Its origins are rooted in lessons learnt during the Grenfell Tower tragedy and reinforced by intensive collaboration efforts and associated learning throughout and beyond the pandemic.

As detailed in Appendix 1, this funding will be supplemented by funding of £25,000 in the first year of the partnership from London Councils (LC), with the potential for additional funding from LC over the longer term and, subject to the funding requested in this report also being forthcoming, a total of £100,000 over the funding term from the Greater London Authority (GLA). Both organisations will also play key roles in rooting this work through into the formal emergency architecture whilst also enabling, through the mechanism of the LCEP, proportionate ways of connecting into, and enlisting insight from, smaller community-based charities. LCEP will therefore enable more targeted and effective engagement with FCVF organisations to supplement and enhance the work of statutory, first responder organisations and dedicated national emergency-response charities, ensuring better localised insights, engagement, and connection, and enabling more impactful responses for the most marginalised Londoners who are often hit hardest by, and have a less resilient starting point to withstand the effects of, emergencies.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Endorse to the BHE Board a grant of £642,500 over four years to Greater London Volunteering [charity no: 1115303], the legal entity for London Plus, to support the work of the London Community Emergencies Partnership.

It is recommended that the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- ii) Agree the grant of £642,500 over four years to Greater London Volunteering as per the terms recommended by the Grants Committee.

Main Report

Background

1. When major emergencies occur in London, a coordinated response is needed from across the whole of the voluntary and community sector, working alongside the extensive response and intelligence provided by statutory bodies. Major incidents in the capital, not least the Grenfell Tower tragedy in 2017, demonstrated that it is often not sufficient for statutory agencies to work alongside emergency services and large national emergency-response charities. Rather, a multi-layered approach is required which harnesses the networks, expertise, social capital and insights of Funder, Community, Voluntary and Faith (FCVF) organisations and integrates them alongside statutory resilience structures, first responders and specialist charitable organisations in the preparation for, and response to, emergencies.
2. The pan-London response to Covid provided an opportunity to improve inter-agency emergency co-ordination. From ensuring a coordinated response on food aid, the development of community hubs, sharing intelligence on met, unmet and funding (or other resource) needs, connecting volunteering groups and sharing good practice, effective action across London involved an array of cross-sectoral organisations and expertise working in partnership.
3. The pandemic also provided numerous opportunities to reflect on and improve collaborative practice in real time within and beyond existing structures, with learning carefully catalogued. Extensive consultation has since taken place to ascertain the strengths and weaknesses of the cross sectoral response. The Managing Director of BHE and the Philanthropy Director, who both played leading roles in stewarding the work of the FCVF throughout the pandemic, have been closely involved throughout.
4. Reviews of the pandemic response found that:

- a. More needs to be done to ensure full representation, adequate resources, and sufficient and equal recognition to the community, voluntary and faith and funding sectors as complementary and valuable partners with statutory bodies.
 - b. Provision needs to be made to better prepare FCVF bodies in non-emergency contexts to ensure their inputs can be rapidly activated when emergencies happen.
 - c. Structural improvements for the co-ordination of emergency preparedness and response in London for the longer term have been identified, recognising that there is a plethora of different groups charged with emergency preparedness and response across different constituencies but insufficient co-ordination and intelligence sharing between them.
5. To achieve these ends, a more permanent structure, which is not reliant on the (temporary) activation of the London Strategic Coordination Group, has been deemed necessary to ensure adequate emergency preparedness across the voluntary, community and faith sectors, ensuring better eventual integration into pan-London emergency response efforts and, ultimately, improved responses to emergencies. The case for this is reinforced by the pan-London response to the Afghan crisis of 2021 (see Appendix 2) and recent floods which also point to the value of co-ordinated voluntary sector actions bringing together many organisations with the resources or the intelligence to tackle an emergency, working alongside and with the statutory sector.
6. London Plus ('LP') has worked assiduously with partners over the last year to develop the thinking behind this structure and inspire engagement and support for it. Its successes in doing so are reflected both in its partnership with the Voluntary and Community Sector Emergencies Partnership ('VCSEP') to deliver the proposed structure, and in the funding contributions of both the GLA and LC.

London Plus – background

7. Greater London Volunteering (GLV), a registered charity, is the legal entity for London Plus (LP), the hub for London's civil society. LP was established in 2017 because of the findings of The Way Ahead¹ which has strongly influenced CBT's approach to working with and supporting civil society infrastructure support in London. LP's remit is to support civil society organisations and networks across London and to build collaborative partnerships that use data, insight, and intelligence on what works (and what does not) in order to tell more fully the story of the collective impact of London's voluntary sector and unlock more impactful responses.

¹ The Way Ahead is a collaboration which aims to improve, and secure the future of, civil society support by putting London's communities at the heart of what we do

8. LP has established itself as a leading contributor to civil society resilience across London, with a track record of establishing effective, strategic partnerships, shaping emergency delivery mechanisms at speed, and ensuring its own operational foundations are as robust as possible. LP has been proactive in marshalling FCVF insights in emergencies, identifying need and working with the necessary agencies to ensure nimble and impactful responses. It was therefore identified as a natural co-chair of the LCEP, working in partnership with the Voluntary and Community Sector Emergencies Partnership (VCSEP).
9. LP will be the lead applicant for funding for LCEP but will pass through around 70% of the funding to the VCSEP and a range of other key delivery partners such as the London Boroughs Faith Network and various Equity Partners well known to CBT. The VCSEP is an initiative which is hosted by the British Red Cross (BRC) and co-chaired equally by BRC and the National Association for Voluntary and Community Action (NAVCA) and funded by third parties. BRC employs any VCSEP staff who have not otherwise been seconded from other organisations and is the charity to which VCSEP funds are contributed (with all VCSEP funds held on a restricted basis within the BRC).
10. VCSEP was established to bring together national and local VCS sector and statutory organisations nationally and coordinate emergency preparedness and response. It gained momentum during the pandemic and has helped knit together a disparate sector. It has backing from central government, is co-chaired by the British Red Cross and the National Association for Voluntary and Community Action ('NAVCA') and brings together over 170 specialist, national and local agencies, and networks across the country. LP makes a leading contribution to the VCSEP's work in London alongside other local organisations.
11. The proportion of CBT funding which LP will pass through to the VCSEP is only for those costs it incurs to make LCEP work in and for London and will be supported by a memorandum of understanding as well as an LCEP partnership agreement between the two organisations. None of the funding is for VCSEP's non-London and national work.
12. If this application is successful, CBT will continue to be a significant contributor to LP's costs, contributing more than 50% overall. Whilst it is not CBT usual practice in the context of its responsive grant making to contribute more than 50% of an organisation's turnover (and requests through its open, responsive programmes would normally be scaled down on this basis), the recommendation in front of the Committee today is for a strategic venture led by a key infrastructure organisation. Officers believe LP is ideally placed to deliver this work and, as such, recommend that the Grants Committee make an exception.
13. Furthermore, officers would not recommend that this consideration should preclude LP from securing funding for LCEP, noting that LP itself will benefit from less than one third of the overall sum requested; that the resulting uplift in CBT's %

contribution is relatively modest (from 57% of LP's funding to 64%); and that officers believe there is no other organisation better placed to co-chair this work alongside VCSEP. As noted in paragraph 23 below, the increased capacity and profile that the LCEP funding should provide for LP will enhance its chances of securing a greater proportion of both core and LCEP funding from other partners over time.

Detail of proposal

14. The proposal is for a funding contribution towards a standing structure; the LCEP, to improve preparedness for, and responses to, emergencies, drive stronger connections, and improve learning about emergency responses. This structure will be co-led by LP and VSCEP to enable the best possible connectivity between the dedicated national emergency response charities who populate the VCSEP and the broad range of smaller, London-focused voluntary, community and faith-based organisations who play such an essential role alongside, enabling better-informed and more impactful responses for Londoners in emergencies. Noting that emergencies often hit the most marginalised communities hardest, the provision of funding for a structure which increases connection into, and insights from, smaller community-based charities should support the most marginalised communities who are often most closely connected to those charities.
15. The LCEP will co-ordinate, lead and deliver a single partnership of all voluntary and community organisations and groups focused on emergencies and ensure effective preparedness for, and response to, future emergencies, working alongside and with existing structures to build preparedness and resilience. The LCEP will create and deliver this partnership with the help of a secretariat, a steering group and a 'network of networks' to share intelligence and experiences, with staff sustaining and nurturing the network and partnership.
16. LCEP describes its vision as a community-centred, co-ordinated response for any Londoner impacted in an emergency, with defined goals around:
 - a. Improved responses to emergencies
 - b. Stronger connections to respond to emergencies
 - c. Improved learning about emergency responses
 - d. Greater preparedness for future emergencies.
17. In terms of the governance, the Chief Executive of LP, and the Director of VCSEP will be co-directors of the LCEP and report to the Steering Group serving as a management board for LCEP. This Steering Group will include the London Boroughs Faith Network, Equity Partners, and London Funders – ensuring these communities' intelligence, efforts, and resources are available, used, and coordinated. Senior representatives from regional and local government will also be included on the Steering Group to ensure the right connections, input, and collaboration with the statutory bodies, and, subject to an approval process in the Autumn, LCEP will be formally integrated into the London Resilience Forum, chaired by the Deputy Mayor of London. LCEP will have defined roles and responsibilities for directors and staff to ensure clarity and focus alongside other agencies when emergencies occur.

18. The Partnership Manager of the LCEP will be line managed by the CEO of LP and based within the LP team, albeit with dotted line reporting to the Director of the VCSEP. This will help mitigate against key person risk within LP and any associated concerns around the knowledge and experience amassed through the LCEP staying in London. Conversely the matrix management of all LCEP personnel between LP and VCSEP also increases the chances of the learning from any London emergency response being assimilated into, and positively informing national practice.
19. The budget for which funding is sought reflects careful engagement with delivery partners as well as sense-checking with the secretariat who led the FCVF inputs during the pandemic. A sizeable proportion (averaging just over 40% for each funding period) will be spent on supporting the engagement with, and associated insights from, key infrastructure partners who will be charged with engaging, as appropriate, with communities of identity, issue or geography in both emergency preparedness and response work as appropriate. The budget also has a level of “surge capacity” built into it, reflecting the unpredictable nature of the demands which will be placed on the LCEP.
20. As far as the chances of longer-term funding support for the LCEP are concerned, it is hoped that support from the GLA and LC will both continue and hopefully increase in the longer term as the clear potential of the LCEP is borne out by its positive contribution to emergency preparedness and response. Other funders may also wish to support its work as it becomes more established and its contribution to both harnessing the insights of marginalised communities in emergency contexts and unlocking appropriate response to support them becomes better understood. However, CBT should anticipate being asked to contribute funding in support of it in the longer term, recognising the challenges of securing longer term support for the sort of infrastructure-focused work LCEP will undertake.

Financial Information

21. Signed accounts for 2021 show that LP had a turnover of £461,320 and unrestricted free reserves of £48,605. The deficits forecast for 2021-22 and budgeted for 2022-23 are largely offset by restricted funds carried forward from 2021. LP’s unrestricted reserves are budgeted to remain unchanged during 2022-23.
22. LP has a ‘risk-based’ reserves policy in its 2020-21 accounts. This policy identified its greatest risk as being the loss of its primary funder, CBT, which commenced a 3-year core funding grant in April 2022. The low reserves policy target, therefore, reflects the low level of risk to which LP judges itself to be exposed and is based on anticipated wind-down costs, calculated in June 2021.
23. CBT’s current grant for core costs will end in March 2025, six months ahead of any potential funding CBT award for LCEP (which will end in September of the same

year as per Appendix 1), at which point the Bridging Divides funding strategy, which offers continuous funding for infrastructure bodies, will still be in place. Further revenue funding for LP is not guaranteed as any future application will be assessed under its own merits, but the option to apply will be available. Furthermore, the stability of London Plus will be monitored through CBT's strong internal grant monitoring procedures for the core grant and, if approved, for the LCEP grant as well, with payments made in quarterly instalments in line with the standard approach for grants/grant risk management.

24. Finally, as LP has been deeply involved in emergency response work since the beginning of the pandemic, and during the Afghan refugee crisis, the war in Ukraine and most recently localised climate-related incidents in London, its capacity to focus on fundraising has been depleted. If this funding is awarded today, it will provide the capacity for London Plus to develop the sustainability of its own operations, independently of its role in London's emergencies response.

Year end as 31 March	2021	2022	2023
	Signed Accounts	Management Accounts	Budget
	£	£	£
Income & expenditure:			
Income	461,320	356,274	541,628
Expenditure	(358,121)	(437,439)	(587,306)
Surplus/(deficit)	103,199	(81,165)	(45,678)
Reserves:			
Total restricted	124,854	45,945	267
Total unrestricted	48,605	46,348	46,348
Total reserves	173,459	92,293	46,615
Of which: free unrestricted	48,605	46,348	46,348
Reserves policy target	32,325	32,325	32,325
Free reserves over/(under) target	16,280	14,023	14,023

Funding History

<i>ID</i>	<i>Type</i>	<i>Meeting</i>	<i>Decision</i>
19410	Anchor Programme	27/5/22	£3,600 to resource LP to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme.
18758	Bridging Divides	01/04/22	£500,000 over three years towards salaries and running costs supporting the continued development and work of LP, through the legal entity of Greater London Volunteering.
18935	Strategic Initiative	27/10/21	£12,860 to be distributed between RE:ACT (94% of funds), Little Village (4%) and Havering Volunteer Centre (2%) to cover petrol and congestion charge costs incurred while delivering essential items to Afghan evacuees in London.
18857	Strategic Initiative	28/06/21	£15,000 - payable to LP - to match fund the GLA contribution to the Festival of Ideas Access Grants programme.

17733	Covid19 Small Charity Emergency Support	27/08/20	A one-off, unrestricted grant of £15,000, equivalent to one regular quarterly payment under the organisation's current grant.
16797	LCRF wave 2	19/05/20	A grant of £50,000 so that the organisation can carry on providing support to Londoners.
15379	Bridging Divides	02/09/19	£500,000 over two years towards the continued development of LP, through the legal entity, Greater London Volunteering.
14255	As above	20/09/17	£350,000 to secure the first year of operation of the London Hub
13952	Anniversary Infrastructure Support programme	26/02/17	£48,400 towards salaries, on-costs, and operational costs to support the organisation's involvement in The Way Ahead and the development of the London Hub

Conclusion

25. This is a critical initiative which builds on in depth exposure to, and analysis of, emergency preparedness and response capability in London. By supporting the funding for a permanent structure to better harness the insights and networks of FCVF organisations across London in preparation for, and response to, emergencies, CBT will be ensuring a more impactful, community-centred, and co-ordinated response for any Londoner impacted in an emergency. As cost-of-living pressures create further hardship for communities already disproportionately negatively impacted by the pandemic, officers recommend support for this new structure as both timely and essential.

Appendices

- Appendix 1 - split of funding across different contributors across proposed funding period
- Appendix 2 - Case Study: Afghan Crisis response
- Appendix 3 - Example Outputs for LCEP
- Appendix 4 - Strategic Initiative Filters

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Appendix 1- Split of funding across different contributors across proposed funding period

	22/23 (six months)	23/24	24/25	25/26 (six months)	TOTAL
GLA contribution	17,000	33,000	33,000	17,000	100,000
London Councils contribution	25,000				25,000
<i>Sub-total (other funders contributions)</i>	<i>42,000</i>	<i>33,000</i>	<i>33,000</i>	<i>17,000</i>	<i>125,000 (16%)</i>
CBT contribution	65,330	232,610	228,760	115,800	642,500 (84%)
Total grant awarded to LCEP	107,330	265,610	261,760	132,800	£767,500

Appendix 2: Case study – Afghan Crisis response

The Afghan crisis in 2021 provides an illustration of the need for the proposed partnership and how it can work well.

In August 2021, 5,000 Afghans were put into “quarantine hotels” in London having been evacuated from Afghanistan as part of the UK (and US) government’s withdrawal. They arrived with few possessions and needing support. Beyond shelter and food, none of the hotels provided this, and statutory responses were inadequate. The sudden arrival of such large numbers with significant needs required an emergency response.

Over the first weekend after the Afghans arrived, LP and the VCSEP brought together national and local organisations who worked to contact the hotels and establish the needs of the Afghans, before collecting and distributing donated goods across over 20 sites.

This effort continued for several weeks until the Afghans moved into “bridging hotels” when local authorities took primary responsibility. Guidance for local authorities supporting the bridging hotels was written by those who had worked on the voluntary sector response, drawing on the experiences and lessons from the quarantine hotels.

The collective response to this crisis was successful, with all Afghans and quarantine hotels receiving support. A host of organisations were involved from the voluntary and community sector (including City Bridge Trust), as well as the statutory sector in London (including GLA, LC and Transport for London). Fire truck and TfL vans as well as drivers, charity donation depots, volunteer centres’ shop space, children’s clothes charities, ex-military volunteers, Red Cross coordinators, Afghan charity translators - all these and more were mobilised to help.

Neither local or regional groups alone, nor national bodies operating in the capital, had the intelligence or capacity and capability to tackle such problems. By operating together, an effective response was possible. The Afghan response also reinforced the importance of partnership and a lack of hierarchy within a network, in order to achieve shared goals.

Crucially, the crisis highlighted the need for extra capacity given the scale and complexity. Significant national resources from the VCSEP were diverted to support the effort in London, as well as from LP. Inevitably this meant de-prioritising existing business as well as needs in other parts of the country. It would not be sustainable in all future emergencies. In addition, learning collated by the VCSEP shows that following a major incident like the Afghan crisis, developing the relationships, understanding and trust between organisations who played a role, makes a significant difference. Capacity and skills are needed to do this well. The successful resolution of future crises cannot be guaranteed unless these lessons are recognised and addressed.

Appendix 3: Outcomes for LCEP

Core outcomes for London will be:

- **Improved responses** to emergencies, meaning faster, more effective, and more coordinated responses across the voluntary and community sector, faith sector, bringing in funders, and working with statutory partners and first responders.
- **Stronger connections** in London, within the voluntary and community sector that deals with emergencies (as a core part of its work or an element only), with the faith sector, and funders, and with the statutory sector.
- **Improved learning** from previous emergencies, in London and beyond, so the full set of partners of LCEP (in the voluntary and community sector, in the faith sector, as well as funders) understand where things have gone well and how they might be improved; ensuring a culture of continuous learning and improvement.
- **Greater preparedness** for future emergencies in London within the voluntary and community sector, with faith sector and funders too.

Appendix 4 – 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?	Y
Can the impact of the work be measured through evaluation?	Y

Committee: Grants Committee of the Bridge House Estates Board Bridge House Estates Board	Date: 26 September 2022 15 November 2022
Subject: Strategic Initiative: Do It Now Now CIC (19406)	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 (£2.004m funding allocation from BHE designated grant making fund)
Report of: David Farnsworth, Managing Director of BHE	For Decision
Report Author: Nat Jordan, Head of Collaborative Action for Recovery Programme	

Summary

This report requests funding of £2,004,000 to be awarded to Do It Now Now Community Interest Company (CIC) (DINN Enterprise CIC, registered company no. 11937494) over two years towards the ‘Continuum Fund’, a bespoke, holistic package of finance and support for Black-led Charity and Social Enterprises (CSEs) to become business ready with access to a wide range of external funding sources including social investment. Included is onward grant making to Black-led charities and social enterprises (CSEs), training and support for the development of charities engaged in the grants programme and running costs.

It will also contribute to CBT’s reputation as a progressive and collaborative funder, providing DINN with the bedrock from which to leverage investment from other funders, including independent trusts and foundations and financial institutions.

The proposed annual scale of funding is commensurate with collaborative funding awards made through the Alliance Partnerships, and another which the Grants Committee agreed in principle to the incubation of the Baobab Foundation at its December 2021 meeting. Comparatively, DINN is a less established body in grant making than those funded through the Alliance programme, but there is no equivalent longer established independent grant maker led by and dedicated to black communities, due to the very fact of the historic underinvestment in Black and minoritized communities.

Funding is initially recommended over its first two years to enable the establishment and launch of the fund, and to secure further support at scale from other interested parties, with the potential for a further application for continuation funding to be forthcoming nearer the appropriate time once a track record can be further assessed.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Endorse to the BHE Board a grant of £2,004,000 over two years to Do It Now Now CIC towards:
 - a. Onward grant making of core funding to transformational, London-focussed small start-up Black-led Charities and Social Enterprises with an income of between £10k-£50k in Stage One of the Continuum Fund (£960,000);
 - b. Training and Core Support (non-financial support) to London-focussed Black-led CSEs partnering with DINN across all stages of the Fund through cohort-based programmes, peer-to-peer support, and more to develop stability, sustainability, and increased impact of the network (£588,000);
 - c. A contribution to running costs, proportionate to a total estimated London benefit of the Continuum Fund (£456,000)

With the release of funding subject to the condition of:

- d. Confirmation that a further £960,000 in match funding has been raised from other sources towards Stage One onward grant making;

With the exception of:

- e. £150,000 from the allocation to running costs to be released as an initial tranche prior to the fulfilment of the condition at d. towards the initial development of the programme, including capacity to develop opportunities to raise the match funding;

It is recommended that the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- ii) Agree the grant of £2,004,000 over two years to Do It Now Now CIC as per the terms agreed by the Grants Committee.

Main Report

Background

1. This report seeks support for a recommendation to partner with an exciting emerging organisation to support the access to funding of Black-led charities and social enterprises (CSEs). Most of the onward support is expected to go to Community Interest Companies (CICs) limited by guarantees, as these form the majority of Black-led organisations.

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. If approved, this would see CBT strengthen its commitment to supporting Londoners most impacted by inequality and injustice with a great potential to multiply the impact of onward funding through the leveraging of further funding support through DINN.
4. Racial inequity, and its related barriers to accessing funding for Black and minoritized communities, is now well documented. It continues to lead to poor outcomes for Black and minoritized communities across London and the UK and crosscuts every area within which CBT aims to have an impact, from education, to healthcare, to the justice system, and across the work of civil society generally.
5. In times of crisis, such as the ongoing pandemic and pressures UK households face with energy, food, and other living costs, these inequities are thrown into starker relief with Black and minoritized communities experiencing the negative effects of crises at disproportionate rates. Ubele, for instance, has highlighted that as many as 9 in 10 Black and minoritized community organisations faced closure as a result of the impact of Covid-19¹.
6. The funding sector is no exception when it comes to replicating the systemic disadvantages faced by Black and minoritized communities. Funders have struggled to achieve a proportionate reach into Black and minoritized communities to their relative population sizes. Amongst funding that does reach organisations led by and for Black and minoritized communities, few have long term strategic funding, and few funders have been explicit in addressing racial inequalities in their strategies².
7. DINN’s own findings are that many Black-led CSEs that are capable of transformational change struggle to achieve their potential due to lack of access to core funding, lack of access to business skills support and mentorship; lack of visibility amongst funders; and lack of active collaboration amongst funders.
8. Some funders, including CBT, are making progress in this area in working through intermediaries, an approach recommended (at least in the short term) in Ubele’s landmark Booska paper³, which explored structural racism in the voluntary, community and social enterprise sector and the impact of the pandemic on funding

¹ Ubele Initiative, 2020: [Impact of Covid-19 on the BAME Community and Voluntary Sector](#)

² Baobab, 2021: [A Better Normal: Building scaled, sustained and engaged investment from funders into racial justice in the UK.](#)

³ Ubele, 2021: Booska Paper: <https://www.ubele.org/our-work/booska-paper>

attitudes in the UK highlighted one such suggestion for how funders can quickly demonstrate their commitment to Black and minoritised communities:

“Consider establishing fund intermediaries with recognised Black and minoritised infrastructure bodies to support them through formal partnership arrangements in the allocation of funds. This will help to shift funding structures to more participatory systems that work closely with communities that funding is designed to benefit. In this way, direct beneficiaries through their representative bodies, are involved in the allocation of funds”.

9. A similar recommendation is made by Ten Years’ Time in its roadmap for funders, ‘Racial Justice and Social Transformation: How funders can act’⁴.
10. CBT has worked with intermediaries to achieve greater reach to minoritised communities in its recent history. For example, through its Moving on Up Project in collaboration with Trust for London and the Black Training and Enterprise Group (BTEG)²; funding for the Ubele Initiative as a strategic partner supporting the development of the London Community Response (LCR), joining the Funders for Race Equality Alliance, and in committing funding in principle to the incubation and development of the Baobab Foundation through Hackney CVS. Indeed, the London Community Response Fund (as part of the wider London Community Response collaboration) resulted in a significant proportion of emergency funding reached racialised minority led organisations during and following the lockdowns. Much of its success in this arena was due to a formal, close working relationship with equity partners who, as well as providing advice on programme design, acted as intermediaries to directly reach communities to support a greater volume of applications from underrepresented communities, including Black and minoritized.

About DINN

11. Established in April 2019, DINN is a registered CIC, and is user and needs-led. It operates in Africa and the UK⁵, with its UK work focussed on initiatives focused on initiatives with government, charities and business to support the social mobility of Black people. With its unique insight into the relationship between Black-led charities, social enterprises and funders, it is particularly well placed to act as a conduit for onward grant making.
12. It also works as an award-winning (NatWest, Harvard Business School, and others) infrastructure organisation providing capacity building support to charities and social enterprises across the UK. In addition to initiatives for its community of over 1,000 Black-led charities and social enterprises, it is often commissioned to provide capacity building support to individuals and organisations, and has an in-house team of skilled trainers, as well as a network of external experts that it works with.

⁴ Ten Years Time, 2022: Racial Justice and Social transformation: How funders can act: <https://tenyearstime.com/wp-content/uploads/2022/02/Racial-Justice-and-Social-Transformation-2.pdf>

⁵ Only a minority, about 5%, of its current activities are in Africa – the vast majority is UK-focussed, and within that, a majority has been London-focussed to date.

13. DINN's 'Futures Board' is responsible for the overall leadership of DINN and is responsible for agreeing the strategic aims, budget, and business plans and overseeing the activities of the organisation. This includes members with experience in leadership development, training, expertise in growth, expansion and supporting community based social enterprises to scale. The Chair, for instance, has previous trustee experience at London charity Hestia, and is the co-founder of a leadership development company.
14. With a background in social policy, DINN's CEO and founder, Bayo Adelaja, has a wealth of experience in developing initiatives to support underserved and underrepresented communities. She has to her name a myriad of accolades including being named amongst the top 100 most influential BAME leaders by the Financial Times and Inclusive Boards (2019), and one of the most influential women in social entrepreneurship in the UK (2018).
15. DINN received funding from CBT through the London Community Response Fund in Wave 4, as core funding to enable the organisational development of DINN as a broker and provider of support to Black-led organisations across London. The £10,000 investment from this grant directly supported the generation of 70% of its £1.3m income for the financial year, demonstrating DINN's capacity to leverage grant funding into further income.
16. As part of the emergency funding response to the coronavirus pandemic, DINN launched the 'Common Call' fund in 2020. Common Call was a grant fund designed to support Black entrepreneurs and innovators in the UK to build and sustain social enterprises. In its pilot, 16 organisations received a total of £50k. In its next iteration, 'Fund 2', £300,000 of onward grant making was distributed, with contributions from Comic Relief's Global Majority Fund, Barclays, National Emergencies Trust, Esmée Fairbairn Foundation, and the Clothworkers' Foundation. Competition across both waves of funding was significant, with 1,038 eligible applications received. With the scale of funding available, just 36 organisations received funding, demonstrating the scale of unmet demand from Black-led CSEs.

Proposal: The Continuum Fund

17. The proposed Continuum Fund's mission is two-fold: for the black-led CSEs eligible to access its funding and for the wider sector of organisations, including funders, that support them. DINN is, and the Continuum Fund will be, unique in the funding landscape as the only funder specifically dedicated to and targeting Black communities. Other initiatives, such as the Baobab Foundation or streams of funding available through more generic funders, tend to have broader focus on racialised communities in general. Whilst such programmes are important in redressing longstanding exclusion from access to funding across a broader spectrum of racialised communities, there remains a need for specific work targeting Black communities which is driven by Black-led organisations that is therefore better able to understand and address specific barriers and experiences.

18. The Continuum Fund has been devised to enable the long-term growth of more Black-led CSEs through a funding “continuum”, which offers a multi-stage programme of funding depending on where a CSE is in its development journey, ranging from core non-repayable grants to repayable zero interest loans and patient debt (that is, long-term capital). Alongside financial support, DINN will offer expert skills and development training to prepare funded organisations for later stages of the fund or further grant or social investment from other sources in the future.
19. The Continuum fund will offer the following funding journey to Black-led CSEs, of which it is recommended that CBT funding focuses exclusively on Stage One:
- I. Smaller Startups Stage: Core funding grants of £10k-£30k will be made to transformational small and start up Black-led CSEs with an income of £10k-£50k
 - II. Development Stage: “Impact first” repayable loans of £15k-£50k, focused on supporting Black-led CSEs to develop core systems to manage large grants and loans, targeted at organisations with an income of £50k-£150k
 - III. Growth Stage: Targeted at organisations with an income from £150k to £500k with revenue generation as part of their impact strategy, this stage will provide social investment in the form of patient capital based on revenue participation and principal repayment
 - IV. Mature Stage: Where CSE income exceeds £500k, introductions will be made to other social lenders.
20. All stages will be supported by a training and development programme for the cohort of funded organisations that provides skills support in key, highly practical areas, with an emphasis on real-time “know how”, rather than “know that” knowledge. Not limited to the production of business plans, development of financial models, or assessing enterprise options feasibility, it will also deliver the following types of content:
- a. Culture change: changing how the leadership and Trustees and leaders think, particularly around accountability, and discipline in delivering activity that generates a surplus.
 - b. Entrepreneurialism: skills in creative thinking, identifying, and prioritising opportunities, and developing and maintaining diverse partnerships.
 - c. Strategic capability: to formulate and implement plans, adjusting based on external environment business delivery: product development and delivery, including sales and marketing, talent development, and ability to manage staff and contractors for accountability.
 - d. Financial literacy: including full-cost, contingencies, and margins.
 - e. Alignment with impact: including the ability to balance business and impact priorities at strategic and tactical levels.

21. This combined support offer will address the specific identified barriers that face Black-led CSEs delivering market-based solutions seeking to access investment, which can include: mistrust or a lack of understanding of the language of investment due to historical underrepresentation in any type of investment and a need to develop skills to understand the scale of investment needed, and what is most appropriate and affordable to them. Many ‘early stage’ organisations have a limited track record of revenue generation, and therefore can be seen as too ‘risky’ for investment and can lack assets against which to secure investments. (N.B. the legal structures of CSEs eligible for the programme will be in line with CBT’s own criteria).
22. A theory of change for the Continuum Fund is included at **Appendix 1**, which details the short to long term outcomes and impacts that the fund and the training and support offered alongside will achieve, focussed on the impact on the CSEs themselves rather than the end users. Key outcomes from the fund will include the strengthened core functions of Black-led CSEs, the long-term improvement of income such that the average income gap between Black-led organisations and wider sector is reduced; and that Black-led organisations have increased capacity to plan and develop for the long-term, responding to the needs of service users rather than giving privilege to the criteria (perceived or actual) of funders. (Please note that where DINN’s own documentation uses the term “unrestricted”, it refers to the flexible and adaptive approach to funding that CBT typically refers to as “core funding”, and onward grant making will not be legally unrestricted).

Continuum – Budget and Fundraising

Table 1: Budget and Fundraising (5 years)

	Grant-making	Training (grant-making only)	Social Investment (SI)	Training (SI)	Running costs	Total
Target	£4.15m	£1.55m	£4.00m	£0.90m	£1.80m	£12.40m
CBT request (for first two years)	£0.96m	£0.59m	-	-	£0.46m	£2.00m
Natwest request	-	-	£1.00m	£0.10m (in kind)		£1.10m
Balance to be raised	£3.19m	£0.96m	£3.00m	£0.80m	£1.34m	£9.34m

23. The grant fund itself, a major focus of this recommendation, has a minimum viability level of £300,000 to disburse (supported by £60,000 running costs, inclusive of a training programme). However, whilst this would enable DINN to deliver a funding

programme at a similar scale to the Common Call fund in the pandemic, this would not have the same scope to achieve the strategic and systems-change level at which DINN's ambitions are set. The request under consideration here exceeds that minimum viability level and would place CBT as the first, and a major, contributor to the scheme, at a scale that supports DINN to start to meet that ambition and sector need.

24. DINN is currently engaged in several positive conversations from funders and financial institutions about the potential for investment across the Continuum Fund offer. Many of these conversations remain at an early stage, prior to the submission of an application, including to the Paul Hamlyn Foundation and Esmée Fairbairn Foundation. Due to the early stages of these conversations, officers recommend a condition that the funding sought in this request be released upon the confirmation that match funding of £960k towards the onward grant making component is secured, so that DINN may be able to leverage CBT's support into further commitments from other funders. This would mitigate any risk of reliance on CBT for the programme, which would undermine its long-term, systems change and strategic aims.
25. However, a more developed avenue for contributions towards the programme is a £1m investment currently under consideration by NatWest to contribute to the Social Investment stages of the fund. This fund would be held by NatWest and "ringfenced", for the funding to be provided directly through its own processes to funded organisations, with back-office costs incurred by NatWest, and with investees gaining access to NatWest training and support resources such as the accelerator programme, and mentorship and coaching, equivalent to approximately £100k of further support. This partnership with DINN will support the further development of DINN's expertise in social investment as DINN focusses on developing and delivering the grants offer, while developing its own social investment back office, and to launch its direct social investment offer in late 2023.
26. The requested contribution to running costs is recommended to be applied across the core costs of running the Continuum Fund (that is, not limited to those directly related to the grant-making), flexibility in which will enable DINN to develop the full pathway from Start Up to Growth stages as is appropriate to the growth of the fund. Over the first two years, the proportion requested equates to just under 72% of budgeted running costs. This is proportionate to the London benefit and the contribution will remain proportionate to any potential changes in split in benefit of the fund between London and the rest of the UK: currently, 90% of DINN's grant making has been focussed on London. Whilst the ambitions for the Continuum Fund are ultimately for its availability to Black-led CSEs UK-wide to grow, as 60% of the Black population of the UK is in London, DINN will always have a substantial London focus. Other funders who contribute to the programme will also be expected to give to its running costs, but it is appropriate for CBT in its position as one of the largest independent funders to contribute as a large proportion in the shorter term to support the programme as it first gets established.

27. Costs include staffing a team with experience in developing relationships and delivering grants programmes, including Directors of External Relations, Grants, and Investments. In addition, to these roles, to support a participatory approach to its grant making, costs are included to pay lived experience leaders to work alongside grants assessors and participate in the Grants Panel to ensure that expertise by experience is central to the grant making alongside professional experience. For example, the Grants Panel includes industry experts such as Patricia Hamzahee, a founder of GiveBlack, has worked with the Grants Panel in the previous Common Call Fund. With the national focus that is the ambition of the fund, DINN also plans to engage local community partners to retain understanding of Black communities at the local level, as well as to support the calls for funding to ensure that outreach is successful. Budget will support the time of those organisations to engage in this process.

28. Marketing and recruitment costs are expected to be at the same level in each of the first two years, though the focus of these will shift from initial recruitment and promotion of the initial grants' calls, to a greater focus on promoting and disseminating learning as it emerges from the fund.

Table 2: Running costs (two years under consideration – note that table 1 above covers the full 5 years; the CBT funding request is for £460,000, with the remainder of the costs below still to be raised)

Expenditure	Year One	Year Two	Total
Staffing	£210,000	£210,000	£420,000
Grants Panel	£10,000	£10,000	£20,000
Grant assessors and assessment committee	£30,000	£30,000	£60,000
Marketing and recruitment	£25,000	£25,000	£25,000
Community partners	£20,000	£20,000	£40,000
Overheads (inc. CRM and website)	£25,000	£25,000	£50,000
Total	£320,000	£320,000	£640,000

29. All onward grant making with CBT funds will go to London-based and focussed CSEs.

Drawdown of funding

30. As it stands, DINN hopes to announce the fund in January 2023, with an anticipated 3 calls for grant applications throughout the year, which would be the primary driver for the cadence at which funding instalments would be required, alongside the potential for earlier weighting of running costs to support the upfront set up and communications considerations. However, due to the attached condition to this

recommendation, and the unpredictable and often slower pace of external funding decisions, it is difficult to establish an appropriate schedule at this stage. CBT officers will work closely with DINN and the BHE & Charities Finance Team to design the drawdown arrangements such that payments are broken down over the two years and received only in advance of onward expenditure and/or grants commitments.

31. This is apart from an initial tranche of £150,000, recommended to be paid to DINN towards its running costs prior to the fulfilment of the condition of match funding, expected to support the roles of Director of External Relations, the Head of Grants and Investments and the Grants and Investments Manager. Whilst these roles are not expected to be exclusively London focussed in the longer term, the same proportion (of 60%) applied at this stage would present challenges to recruitment and ensuring the relevant skills are brought in house. Should match funding be secured and the balance of funds therefore be released, the overall contribution to running costs would remain proportionate. In the case that it would not, DINN will ensure that these roles are, in the short term, proportionately focussed to London benefit.
32. This initial release of funds will ensure that DINN is appropriately resourced in the early development stages of the Continuum Fund, to ensure that staffing is in place to raise the required match and significantly de-risk the condition for the organisation. This is supported by emerging research that its CEO is involved in at Centre for London's Impact Investing Research Group, and the challenges for raising investment for new organisations (where new programmes amongst existing mainstream funders tends to be preferred to investing). A smaller tranche of the fund (proportionate to the recommendation as a whole) committed by CBT will go some way to addressing the barriers to new funding organisations in establishing themselves as they encounter challenges in finding first supporters willing to commit funds.

Financial information

33. DINN currently receives its income from a mixture of grants and trading income. Since its founding in 2019, its income level has grown substantially as its work has expanded. DINN has spent less than it has earned, resulting in substantial surpluses which have been generated deliberately as part of DINN's growth strategy as it aims to ensure that it has 6 to 9 months expenditure available to support its growth and in recognition of the risks presented in the current state of the economy. The table below shows the reserves level is expected to drop as a proportion of expenditure in 2023; however, the net trend in total funds held in reserve is increasing to support the growth, and the proportion will level off as its growth steadies, and its target is to be in line with policy by 2025/26. Its balance sheet is strong, with an expected net asset position at year end 30 September 2022 of £1.3m, in line with the stated aim to support their growth. Net assets are made up of cash balances and significant deferred income relating to income received in advance of the projects to which they relate.

Year end as at 30th September	2021	2022	2023
	Draft Accounts	Forecast	Budget
	£	£	
Income & expenditure:			
Income	1,060,014	2,305,146	6,348,293
- % of Income confirmed as at	100%	100%	21%
Expenditure	(808,291)	(1,242,604)	(5,584,541)
Total profit/(loss)	251,723	1,062,542	763,752
Operating expenditure	748,868	1,183,398	5,584,541
Balance sheet:			
Net assets/(liabilities)	257,701	1,320,243	2,083,995
<i>Of which:</i>			
Share capital / share premium	0	0	0
Profit & loss reserves	257,702	1,320,244	2,083,996
	257,702	1,320,244	2,083,996
Months' expenditure covered by reserves	4.13	13.39	4.48

34. The recommended grant amount will not exceed 50% of the organisation's income, as per CBT's policy.

Conclusion

35. The pandemic's highlighting of existing inequity and the concurrent increase in profile of the Black Lives Matter (BLM) movement in 2020 resulted in an upsurge of investment in racialised communities from funders. Two years on, the impetus remains on funders to increase their reach to racialised communities and divest power and resources to organisations led by and for them with direct knowledge and expertise by experience of the challenges facing those organisations.

36. DINN, a "rising star" organisation is designing a programme of funding that meets needs established through that direct understanding, with a long-term vision to support the sustainability of Black-led CSEs by investing both in their work and leadership potential. Learning that emerges from this pioneering programme will be of great interest to CBT and the wider sector.

37. With ongoing challenges in breaking traditional models of funding and power dynamics in the sector, DINN requires bold action from a funder to be the first to commit support and leverage further commitments from those who hold such power and resource. CBT, with its track record of successful "pump priming" of

innovative initiatives is well placed to partner with DINN in the development of this programme.

38. Funding DINN supports CBT's vision - '*For London to be a city where all individuals and communities can thrive, especially those experiencing disadvantage and marginalisation.*' It also supports our PACIER values, in particular the aim to be progressive, inclusive, and representative and provides an opportunity for CBT to be adaptive and observe and learn from a fellow funder operating in new ways.

39. Finally, the Grants Committee's and BHE Board's support facilitates many of the actions set out in the CBT's Race Action Plan, DEI Working Group Action plan, and the Interim Review of Bridging Divides recommendations.

Appendices

- Appendix 1: DINN Theory of Change
- Appendix 2: Common Call – Fund Two: Insights from applications to a Black-focused grant fund

Nat Jordan

Head of Collaborative Action for Recovery Programme

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Common Call Continuum Fund Theory of Change

The Common Call Continuum Fund will be a bespoke, holistic package of finance and support for Black-led Charity and Social Enterprises (CSEs). The fund will offer 'joined up' processes, bringing together existing and new supporters of 'sustainable enterprise', to align efforts to help Black-led CSEs become business ready with access to a wide range of external funding sources including social investment.

The Common Call Continuum Fund is centred on systems theory and the pecking order theory of business finance. Systems theory will enable us to understand the components and dynamics of CSEs systems in order to interpret problems and develop balance intervention strategies with the goal of enhancing *goodness of fit* between individuals, CSEs and their communities. Our systems approach will put local voices in the lead and build on local strengths (rather than focus on problems). The approach will be intentional and adaptable about collaborating across organisations and different stakeholders.

Secondly, the fund uses pecking order theory to determine the funding requirements of CSEs at different stages of their development. Pecking order theory suggests that CSEs will have 'pecking order' preference of funding starting with largely internal funds then moving on to obtaining external funding sources. In other words, the typical CSEs would have a funding lifecycle of first using self-funding and grant funding, followed by subsidised debt followed by market rate debt and finally equity. The interconnectedness and substitutability between different sources of finance are crucial to financing the continuous development of CSEs.

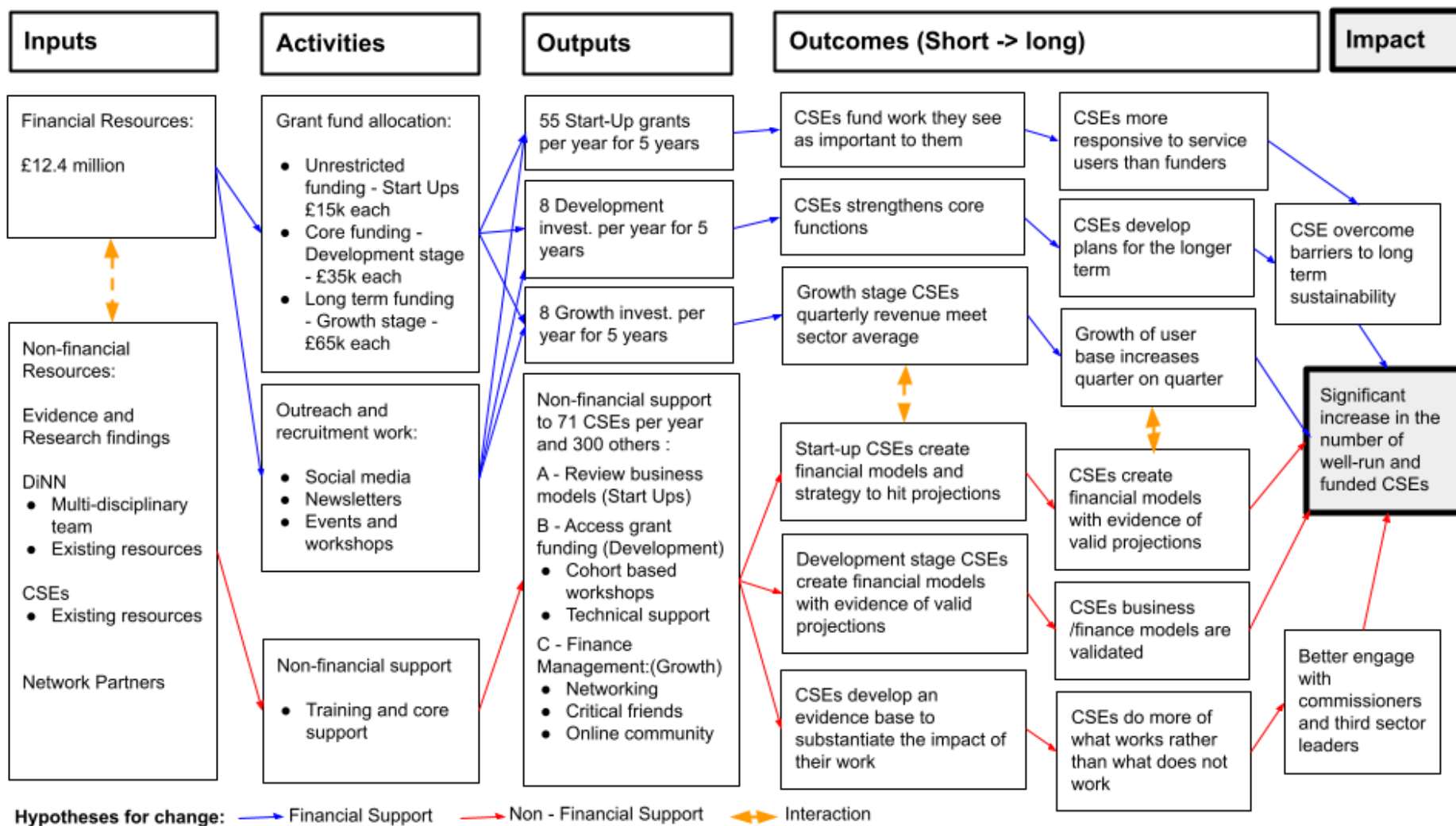
This theory of change focuses on the impact on CSEs rather than on end users. This higher level theory of change goes beyond just funding direct service delivery through supporting CSEs to become more efficient and effective at achieving a single goal. It includes capacity-building work with grantees; fund pilot projects in the ideas that prove CSEs' work and can then be scaled up; provide flexible funding to help CSEs be more responsive to user needs; and/or provide long term funding to enable longer term planning.

The target audience for this fund is Black-Led CSEs deploying market-based solutions, but which struggle to access available social investment because:

- They either mistrust or do not understand the language of "investment" (with founders typically being from communities under-represented in any type of investment, including social investment)
- They typically require skills training to consider how much investment they need and in what form is most appropriate and affordable
- They are often "early stage" with a limited track record of revenue generation
- They often lack assets
- Their business models follow a "low and slow" growth path
- They typically generate low margins
- They are vulnerable to external and internal risks, which are exacerbated by a lack of corporate governance

Provided below is a detailed presentation of the types of inputs, activities, outputs, desired outcomes of the common call continuum fund as well as hypotheses for change, to aid programme design. The assumptions on which the project is based are also provided. The theory of change will serve as the foundation for programme planning, management, communications, evaluation and future fundraising.

Theory of Change



Assumptions	Enablers or Inhibitors
<ul style="list-style-type: none"> ● Unrestricted funding enables more innovation among grantees and ensures the success of more projects and programmes. ● System change is possible in the short to medium term. ● More funders active in the CSE space will improve the prospects of positive and sustainable social change. ● CSEs with path dependent grant funding have a preference for social investment sources of finance over other forms of repayable finance. ● Grant and support is viewed as helpful rather than an unnecessarily complex relationship. ● Power dynamics between funder and grantee are managed appropriately and enables DiNN to take an <i>honest broker</i> role. 	<ul style="list-style-type: none"> ● Levels of engagement with the programmes - building relationship, sharing experiences and experimenting with new ideas ● Entrepreneurial orientation - autonomy, risk taking, innovativeness and proactiveness ● Learning orientation - disposition of grantee to learn programme content ● Organisational culture and style of leadership.

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Common Call Fund Two:

Insights from applications to a Black-Focused Grant Fund



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Foreword

The UK social sector is shifting faster than ever, the last twenty-two months (2020/21) have been an extraordinary journey for equitable practice in grant-making and social investment. We are seeing more grant-making and on-ward investing into user-led organisations and through more representative distribution partners like ourselves.

[Do it Now Now's](#), Common Call has a fascinating and important story to tell about grant-making that is truly beneficial to the sector. The importance of the Common Call programme and experience cannot be underestimated. First, it is useful to the leaders of Black-led charities and social enterprises who received grant funds and support in extremely challenging conditions, as pressure on the public purse combined horribly with the pandemic to constrict the limited pools of money available. Second, as a Black-focused fund that attracted 1101 applications for funding and 580 applications for infrastructure “funder plus” support in the past 12 months, we must take stock of how Common Call tested long held perceptions about how and through whom frontline minoritised organisations access capital, which is still a live debate.

As with any pioneering initiative, Common Call has not been without its challenges. It was never going to disrupt the boundaries of traditional attitudes towards grant making without navigating tensions and often operating in unknown territories. We simply must tell the full Common Call story and in particular the stories of our grantees. We are committed to doing even more to empower and strengthen the Black-led organisations in our network who have long hoped for, and now benefit from, the existence of a fund like ours in their ecosystem. I know that historically we haven't done enough to tell that story.

From its Pilot to present day, Common Call is a success story. Our sector is better because of it. I believe passionately that this approach to grant making can grow, and key to that growth is the sharing of the experiences of pioneering organisations such as Do It Now Now. During COVID-19, we saw the power of local actors effectively responding to the pandemic and protecting marginalised communities, where top-down institutions had failed. There are many pertinent lessons and benchmarks to consider. We need the sector to put real funding behind the idea that proximate leaders best understand problems and therefore the solutions.

As we start to consider a post-pandemic era and the effects of it, such as the wedge of inequality, local practitioners and marginalised communities on the ground have run out of patience for truism, debates, or lengthy strategic planning processes. They are also out of patience for empty promises to ‘do better’ or ‘examine bias’ without significant shifts in funding and on-ward grant distribution through more representative partners.

As an organisation Do it Now Now has developed insight into the ‘contract of understanding’ between Black-led charities, social enterprises and funders. The organisation is uniquely placed to navigate the expectations of both parties and engender commitment from funders to address the most pressing needs of racial disadvantage in the UK's Black community.

So, what better time than to capture the data and to undertake this analysis and develop recommendations for funders based on the lessons from the Common Call Pilot. I hope you find the outcome as interesting and useful as I do.

Ugo Ikokuwu

Director of Investments and Grants



Introduction

As the title suggests, in this report, we're focusing on the data. Until now, the story of the fund has been told through a statistically unrepresentative dataset. As we come to the close of Fund Two, now with access to two years worth of applications, and interviews with many of the organisations involved, we can now paint a more complete picture.

It's important to remember that Common Call set out to achieve something that many people in the impact sector thought impossible; to persuade Trusts and foundations to reconfigure their funds to create new Black-led specific funding pots and for those funds to operate in tandem with other programmes being open to Black-led organisations.

Prior to Common Call's existence, funding to Black led charities and social enterprises in the sector, while not unheard of, was commonly restricted to well-resourced larger mainstream organisations with evaluation teams and the capacity to maintain relationships with funders. This fund has represented a bold new direction. In that context, we consider both the management and performance of Common Call across two disbursement phases (2020-2021 and 2021-2022).

Black-led charities and social enterprises (CSE's) are as concerned about sustainability as funders, but in different ways. The importance of revenue funding for activities and capital investments for CSEs cannot be overemphasised. This is especially the case following the current pandemic, the devastating effects, as well

as plans towards recovery. Many of these organisations, despite making social and economic impact, have been left in very precarious situations and on the fringes, which could affect their sustainability. Despite the intersectional barriers experienced by Black-led organisations, focused primarily on Black communities in the UK, these organisations have demonstrated resilience as they continue to make significant and transformative impact in underserved communities.

In the first phase of DINN's innovative funding project - Common Call a total of 16 organisations received funding worth a total of £50k. For a sector unused to onward grant distribution through Black-led intermediaries, this was a significant achievement (see [Quick view: learnings from our pilot grant fund - Do it Now Now](#)). The funded organisations supported communities over a period of 6 months, at the peak of the pandemic. This led to diverse outcomes for their communities including, improved general wellbeing, reduced hardships as well as fostering social integration during a period where lockdown measures strained social connections.

At the close of the fund, we found that approximately 60% of the income of the UK's Black-led, Black focused organisations comes from the personal savings and employment income of their Directors, while approximately 20% comes from grants.

Following the success of the Pilot, we are delighted to have received funding from Comic Relief's Global Majority Fund



to provide financial support to Black-led charities and social enterprises who have been disproportionately impacted by COVID-19 in the UK. The £300,000 fund includes contributions from Barclays, National Emergencies Trust, Esmée Fairbairn Foundation, The Clothworkers' Foundation and Comic Relief. Fund Two

is characterised by increased deal flow and deal size, as well as expanding our outreach to Black-led organisations who are making significant impact across several sectors. This will in-turn allow them to expand outreach to their service users and communities while making a significant impact.

In the first phase of DINN's innovative funding project - Common Call a total of 16 organisations received funding worth a total of £50k



Improving the Process

Learning Incorporated from Common Call 1

Between the Pilot Fund and Fund Two, we introduced changes aimed at significantly reducing key barriers associated with fundraising. The aim was to streamline the process while ensuring we created an inclusive due diligence process. The key updates are discussed below.

Application form

After Common Call's Pilot, post-grant discussions with applicants revealed the need to further streamline the application process. As many of these organisations are under-resourced and don't possess the infrastructure support to build their fundraising capacity. Following this feedback, we reduced the number of questions and paraphrased some of the questions for greater clarity.

We observed the quality of many applications to the Pilot fund were below sector standards, so in Fund Two we ran tailored information sessions, created social media and email based feedback loops to ensure our reachability. We also ran over a hundred 1-2-1 pre-application calls with a Grant Manager to discuss applications process and questions ahead of any completion. This had a significant impact on

the number and quality of applications we received. The feedback from applicants was also very positive and many of them valued the opportunity to speak with a Grant Manager.

Policy documents

During Common Call's Pilot, we sought to create a more inclusive due diligence process by supporting applicants to create the necessary policies and practices ahead of submission. In Fund Two, we went a step further. In the Pilot Fund, applicants were required to upload copies of several key organisational policies including Safeguarding, Diversity and Inclusion and more as documents as evidence of their adherence to best practice. However, following our review of these documents, we wanted to better understand the practicalities associated with implementing these policies day-to-day. Therefore in Fund Two, rather than ask questions that required a binary response and an uploaded document, we sought a greater understanding for how potential grantees would handle specific events. For example, asking what steps would be taken in the event of a Safeguarding risk. This provided us with the opportunity to examine practices within organisations, while providing organisations the opportunity to re-evaluate their practices.

Publicising of grant opportunity

In the Pilot, we relied on social media and organisations within our network to promote the funding call. We received a total of 483 applications. This was spread across the UK, however, a large percentage of the applications were from organisations based in England with a high percentage from London. As a result of our learning from Common Call's Pilot, one of our key goals for Fund Two was to ensure a much more diverse geographical spread of applications to the fund. We were able to achieve this through a number of ways. We capitalised on many of the relationships we had formed in the 12 months since we entered the grant-making sector as a funder. We also worked in collaboration with a number of regional partners and infrastructure organisations who co-hosted events with us. We developed regional partnerships and referral routes. Others listed our grant opportunity on their websites, or sent out a promotional email to their entire network of organisations. This was in addition to the press coverage we received in large part due to the efforts of our primary funder, Comic Relief. In total, we received 836 Expressions of Interest for Common Call Fund Two. We analysed the archetypes of organisations between the two funding calls and realised that there were fewer sole traders and for-profit businesses proportionally represented, although our funding criteria was flexible and open on the types of legal structures we invested into.

Grant amount

Considering the limited funding awarded to Do it Now Now to disburse in Common Call's Pilot Fund (£50,000), our aim was to maximise outreach while making an impact. As a grant-funded impact delivery

organisation (providing training in financial inclusion, leadership skills, employability skills and entrepreneurship) to thousands of Black people year-on-year, we know that even small grants can make a positive and significant impact on an organisation's sustainability. For example, small grants can be deployed by organisations in digitising their impact delivery, hiring a strategist to consult on a particular problem, or investing in their customer relationship management (CRM) software. Therefore, we advised potential applicants that awards would be between £1k and £3k. The average ask for that pot of funding was £2.2k. However, following the quality of applications, and the needs of applicants, we felt that although not a huge amount, awarding £3k to grantees would likely have a transformational impact on their organisation.

Based on interviews and quantitative data collected through the process, we knew that Black-led organisations applying to the fund were spending out-of-pocket on things that had not traditionally been welcomed in grant applications; core costs, staff costs, capital costs. With this in mind, we increased the lower asks and requested new budgets that included key costs that they habitually paid out-of-pocket. Following that process, we awarded £3k to a total of 16 organisations, deploying £48k in total. Based on the identified needs and an increased pot of funding for Common Call Fund Two, we decided to set grant amounts of £5,000 OR £12,500. Organisations could apply for either sum, based on eligibility as stated in the published guidelines.

We encouraged organisations to state the real cost of running their impactful interventions. This is because of the current pandemic, with reduced/loss of income/ disposable income it has become increasingly difficult to fund projects personally. In our upcoming Learnings Report we will investigate what effect this change had on the grantees and applicants. While it is not inherently negative that founders and directors are donating money to their own organisations (on average 60% of the organisation's turnover), it becomes negative when we investigate the compounding factors. In the midst of a pandemic born financial crisis it is important to remember that:

- **Black people are the least likely racial group to have a combined household income of over £2000, as of March 2020.**
- **The households most likely to have a weekly income of less than £400 are from Black ethnic groups, at 35%.**
- **19.6% of the Black population lives in the most economically deprived parts of the country, the highest of any racial group to be concentrated in deprived areas.**
- **14.7% of Black people also live in the most employment deprived parts of the country, again the highest of any racial group.**

The above figures are all according to the most recent reports by the [Office of National Statistics](#) who also state that 45% of the Black African population in the UK is living in poverty.

As an organisation that is both funded and funder, our start in this sector is not at all dissimilar from the dire financial constraints many of our grantees and applicants, CEO Bayo Adelaja has shared in articles and podcasts about her disbelief and utter relief upon [Do it Now Now](#) being able to pay a modest salary to help her transition into 40 hours a week on the organisation as opposed to 40 hours a week on Do it Now Now and 30 hours a week as a freelancer with demanding clients.

The sector cannot continue to expect people who are already experiencing the brunt of what society has to offer to sacrifice what is in hand to intervene for themselves and others. The promise of the impact sector is that it does this work on their behalf without asking them to sacrifice more than what is sensible or safe.





Key Findings

Number of Applications

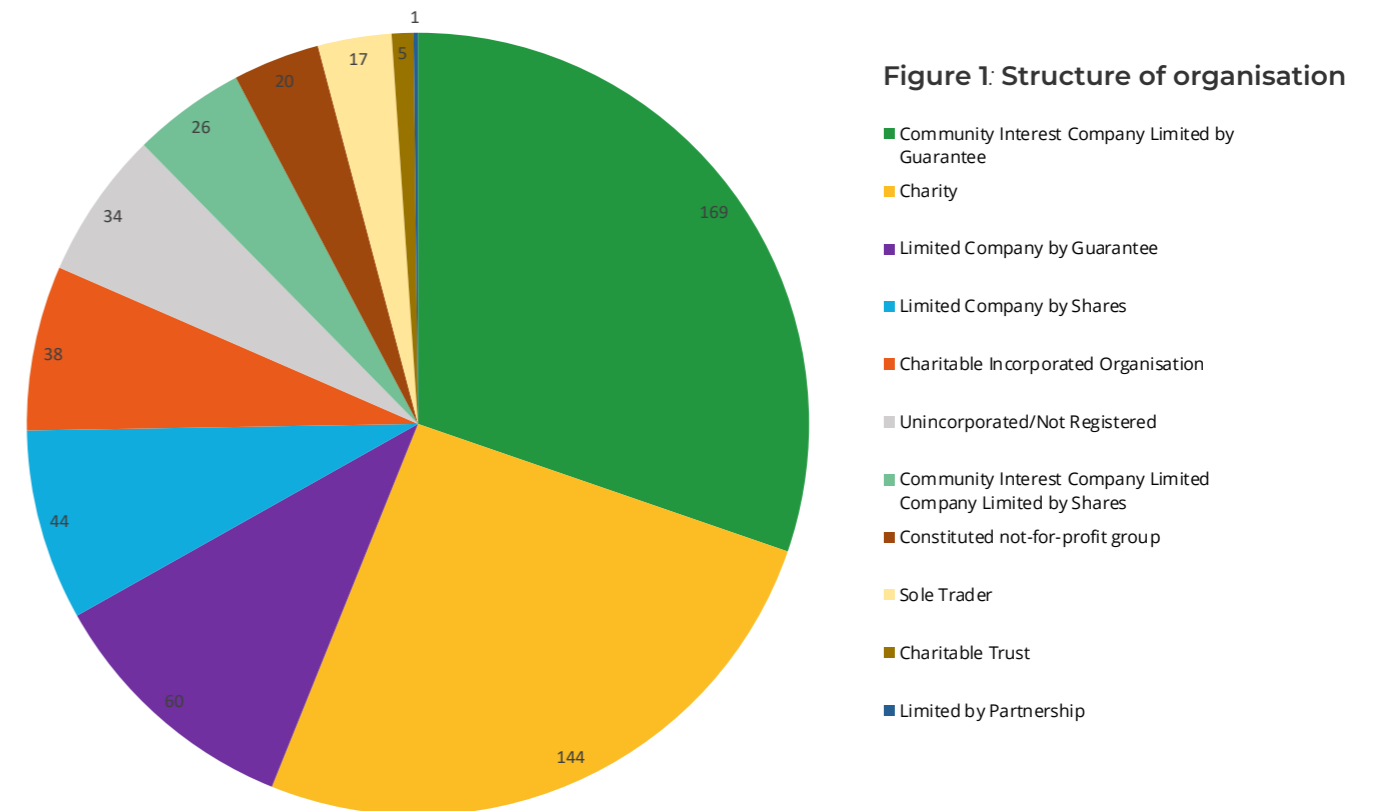
A total of 836 organisations expressed interest in the funding call. Of this number, 601 submitted and 235 organisations did not complete their applications. Our research reveals that there are two major factors responsible for this;

Lack of staff capacity, time and the need to direct resources where urgently needed.

Perception that they will be competing for the same oversubscribed pot of money.

Many Black-led organisations are typically micro and small. This means that only a few individuals carry out the day-to-day activities of these organisations, leaving little or no room for fundraising which typically requires expertise that lived experience leaders do not possess. Secondly, owing to the limited funds available (£300K) and the number of Black-led organisations across the UK, the organisations that did not complete the application weighed the opportunity cost of applying to a fund without proper training in bid-writing and full awareness of the funding landscape over spending that time supporting their communities and continuing to sacrifice their own personal finances to do so.

Structure of Organisations

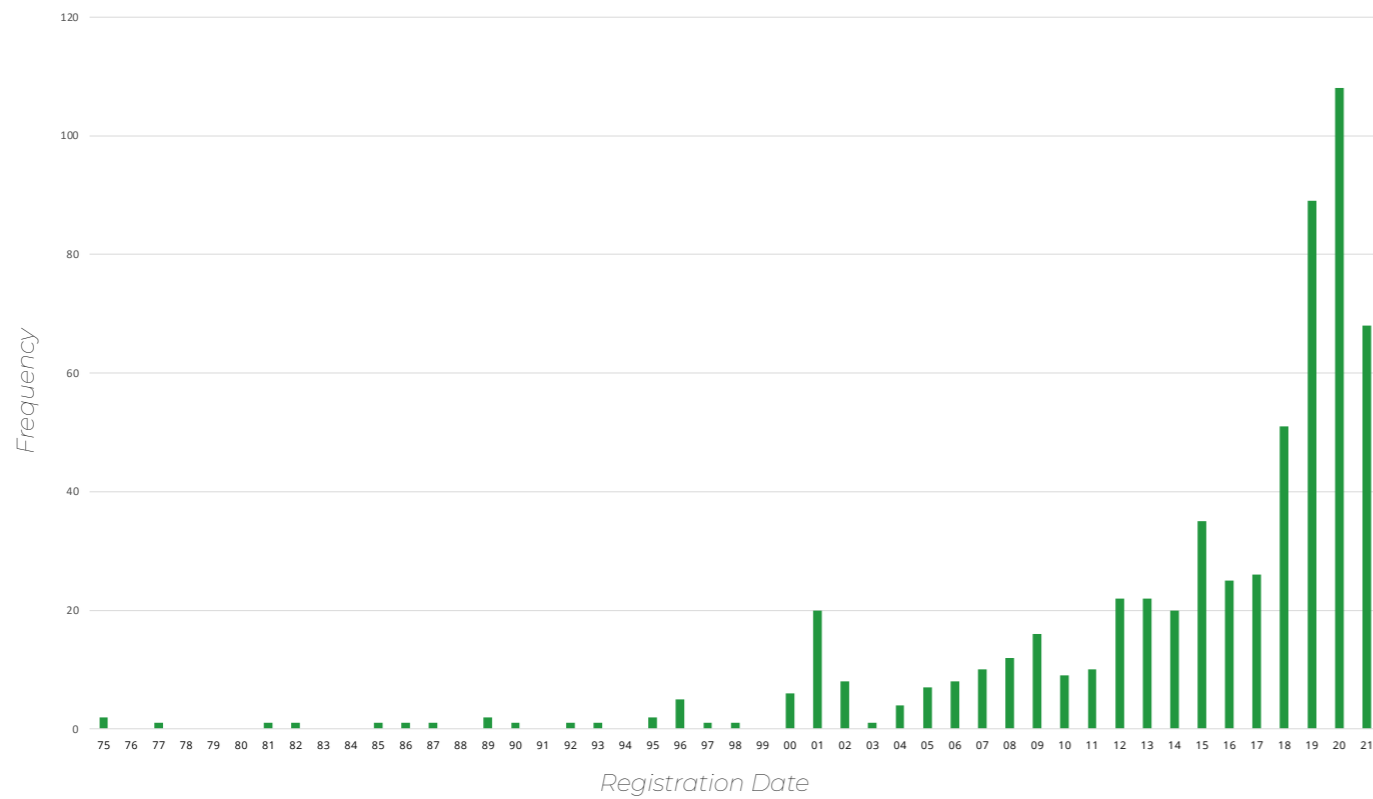


As shown in the figure above, the majority of the organisations that applied to Common Call 2 are Community Interest companies (CIC) limited by guarantee, followed by charities, while companies limited by partnership have the least representation. See Tables 5 and 17 in the Appendix.

Year of Registration

While Common Call Fund Two was open to unregistered organisations, we noticed a wide variation in the years organisations were registered which ranged from 1975 to 2021. The figure below presents the number of registrations between 1975 to date, based on the 601 applications received (For more details, see Table 1 in the Appendix).

Figure 2: Year vs number of registrations

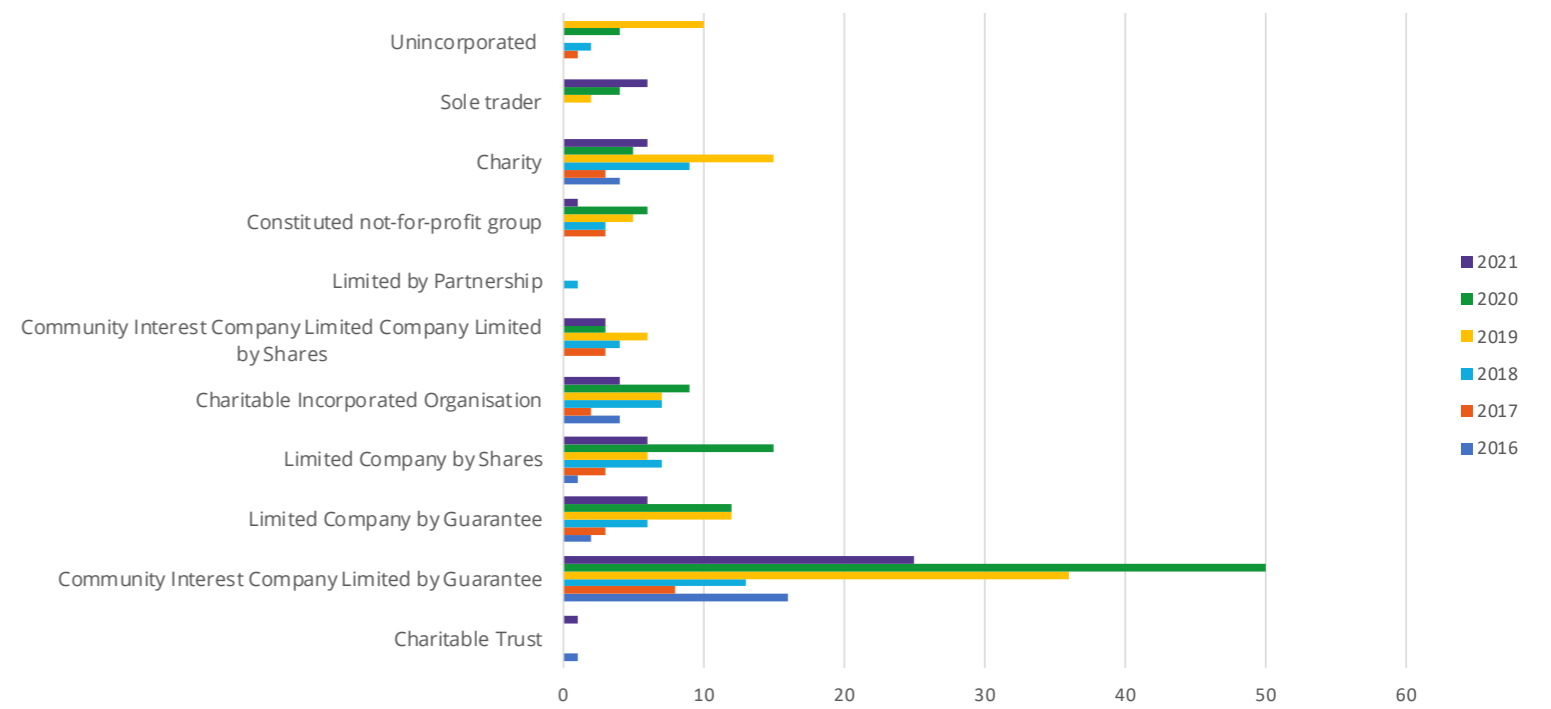


There has been an increase in the number of registrations since 2016, with the highest number of registrations (108) in 2020. This represents a 21.35% increase from registrations in 2019 (89). It is however not surprising, considering the role civil organisations played at the peak of the pandemic, supporting communities. The figure across shows the breakdown of registration by year and structure of organisation (see Table 2 in the Appendix).



21.35% increase from registrations in 2019

Figure 3: Structure of organisation vs Year of registration



As more Black people are running community projects, businesses and groups have come to discover the increased need for their services and the finance gap between their personal contributions and what is needed, many are seeking to engage in the formal funding system for the first time. It is expected that more registrations will take place in 2021.





Nation vs Number of Applications

The number of applications in Common Call 2 (601) represents a 33.26% increase from Common Call's Pilot Fund (451 applications). (See Table 3 in the Appendix).

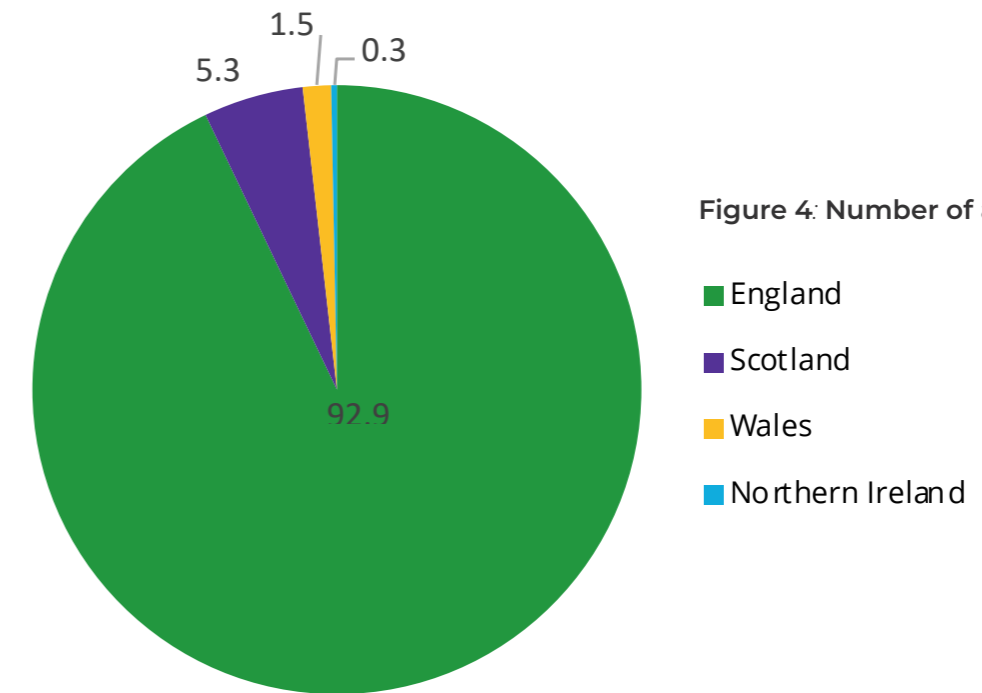


Figure 4: Number of applications per nation

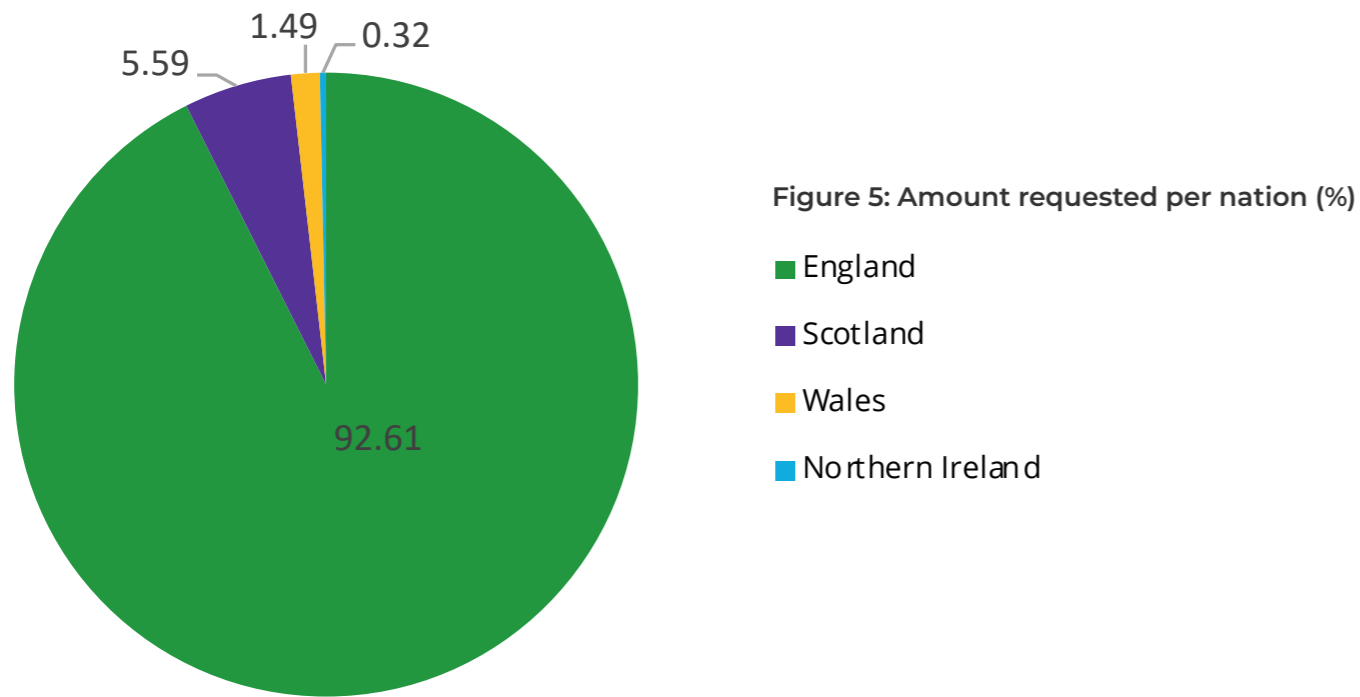
Additionally, there was a marginal increase in the number of organisations applying from outside England compared to Common Call's Pilot Fund. For instance, we received 32 applications from Scotland and 9 from Wales, compared to the year before when we received 3 from Scotland and 1 from Wales. For Northern Ireland, the number of applications dropped from 9 to 2. The reasons for this are being explored and will be presented in our next report. However, plans are underway to expand the number of Black-led organisations within our network and promote a more national outlook. Focus will be on Scotland, Wales, and Northern Ireland while building on our network in England. The figure above shows the spread of submitted applications across the UK (based on nations). As shown in the figure, England has the highest number of applications, 93% with Scotland at 5%, Wales 1% and Northern Ireland, less than 1% (0.0033%).

Amount Requested

The total amount requested (£5,547,500) is significantly higher than that of the Common Call Pilot Fund (£1,300,000) representing a 327% increase. Clearly, the current demand for grant funding exceeds the supply of £300,000. Breakdown of demand across nations is as shown in figure on page 18. (See Table 4 in the Appendix).



327% increase of funding requested overall from the Common Call Pilot Fund

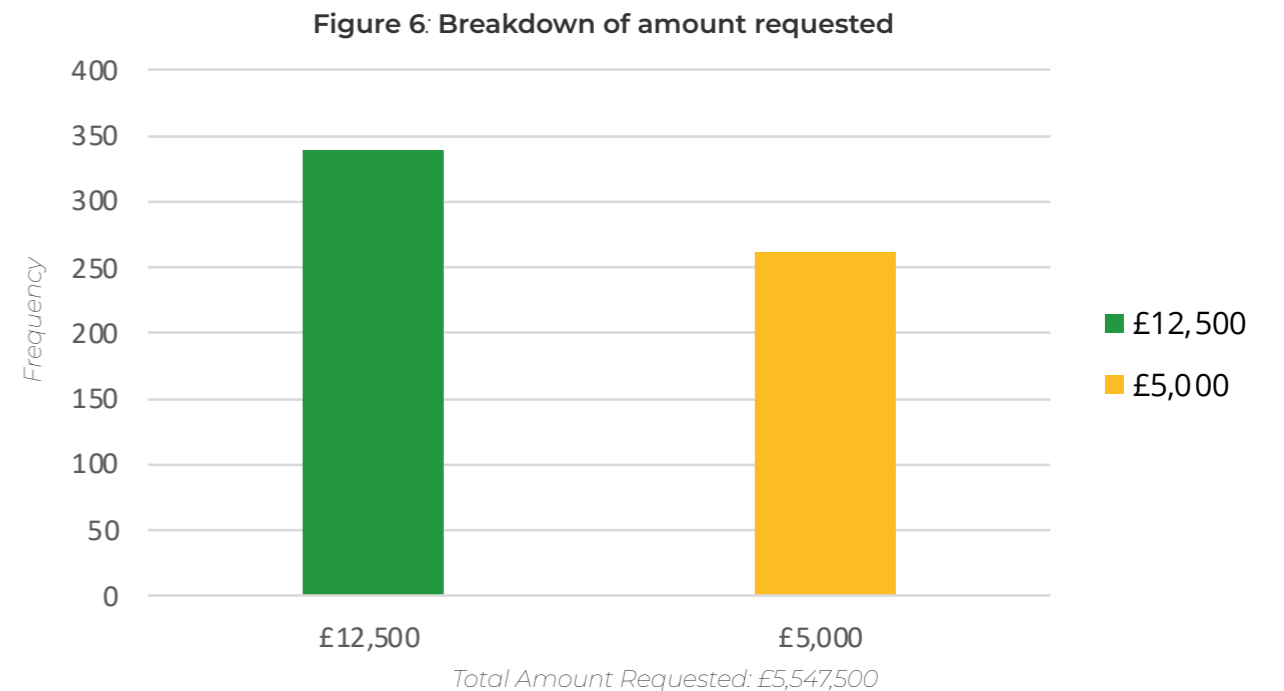


It is unsurprising that the request from England (£5,137,500) is significantly higher than the cumulative amount (£410,000) from other nations (Scotland: £310,000; Wales: £82,500 and Northern Ireland: £17,500). This is considering the ratio of applications across nations as well as the demographic breakdown of the Black communities across the UK, with England accounting for 60% of the entire Black population in the UK. However, as mentioned previously, we are working towards capturing more Black-led organisations across the UK.



Breakdown of Amount Requested

Unlike Common Call's Pilot Fund, in which organisations could only apply for £3,000, under Fund Two, organisations could apply for 2 strands - £12,500 or £5,000 with limitations on which could be chosen based on their registration status and income over 12 months prior to the application. Breakdown of the amounts requested is shown in the figure below. (See Table 19 in the Appendix).



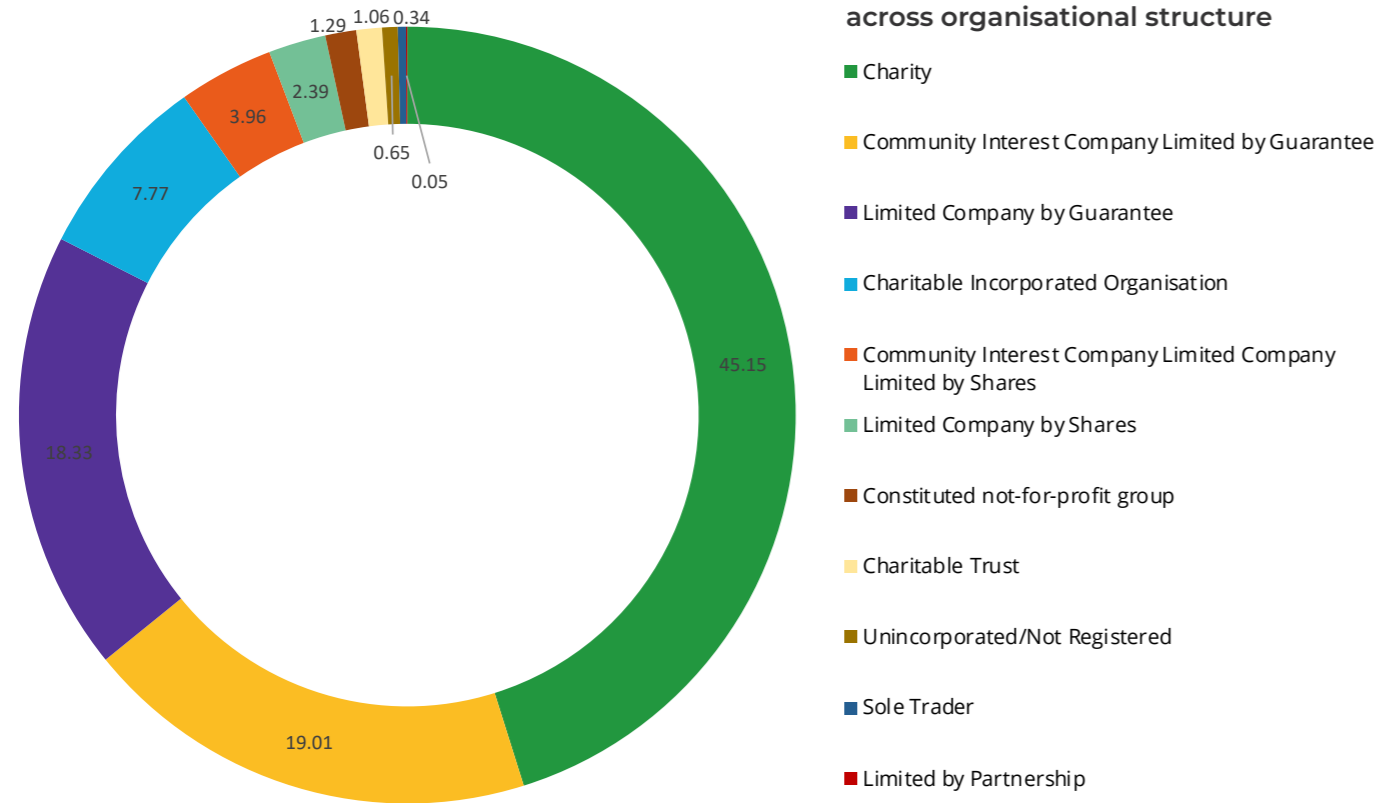
56% of organisations requested £12,500 and 44% requested £5,000. Again, it is not surprising that more organisations applied for grants of £12,500. This reflects the demand for grants for the delivery of support to Black communities on a sustainable basis as previously stated. Preliminary discussions with organisations suggest that some organisations opted for £5,000 despite being eligible for £12,500, as a means to increase their chances of securing grants.

Funding request from England is significantly higher than the cumulative amount from other nations.

Income

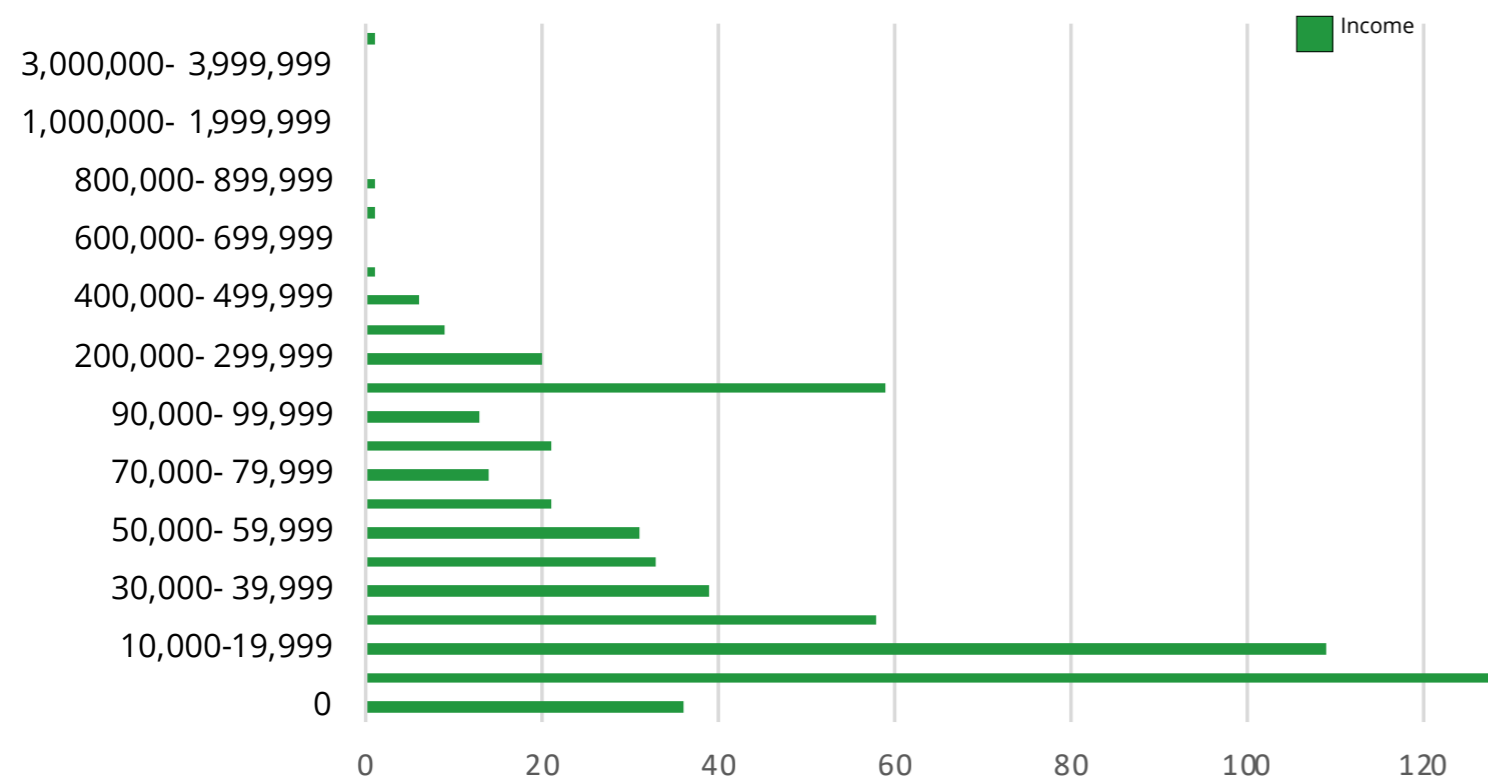
The income of the 601 organisations that completed their applications amounted to £38,665,056.57 in the past 12 months. As shown in Figure 7 on page 20, charities had the highest amount of income, representing 45% of the total income received. The second highest income was reported by CICs limited by guarantee, representing 19% of the total income received. Next is companies limited by guarantees representing 18% of the total income received. Income from charitable incorporated organisations amounted to 8% of the total income received. Limited by partnership organisations had the least reported income (0.05%). (See Table 6 in the Appendix).

Figure 7: Breakdown of total income across organisational structure



It is worthy of mention that the total income received by these organisations could potentially mask the level of income received by individual organisations in the past 12 months. The figure below provides an overview of income levels (see Table 7 in the Appendix).

Figure 8: Income range vs Number of Organisations:



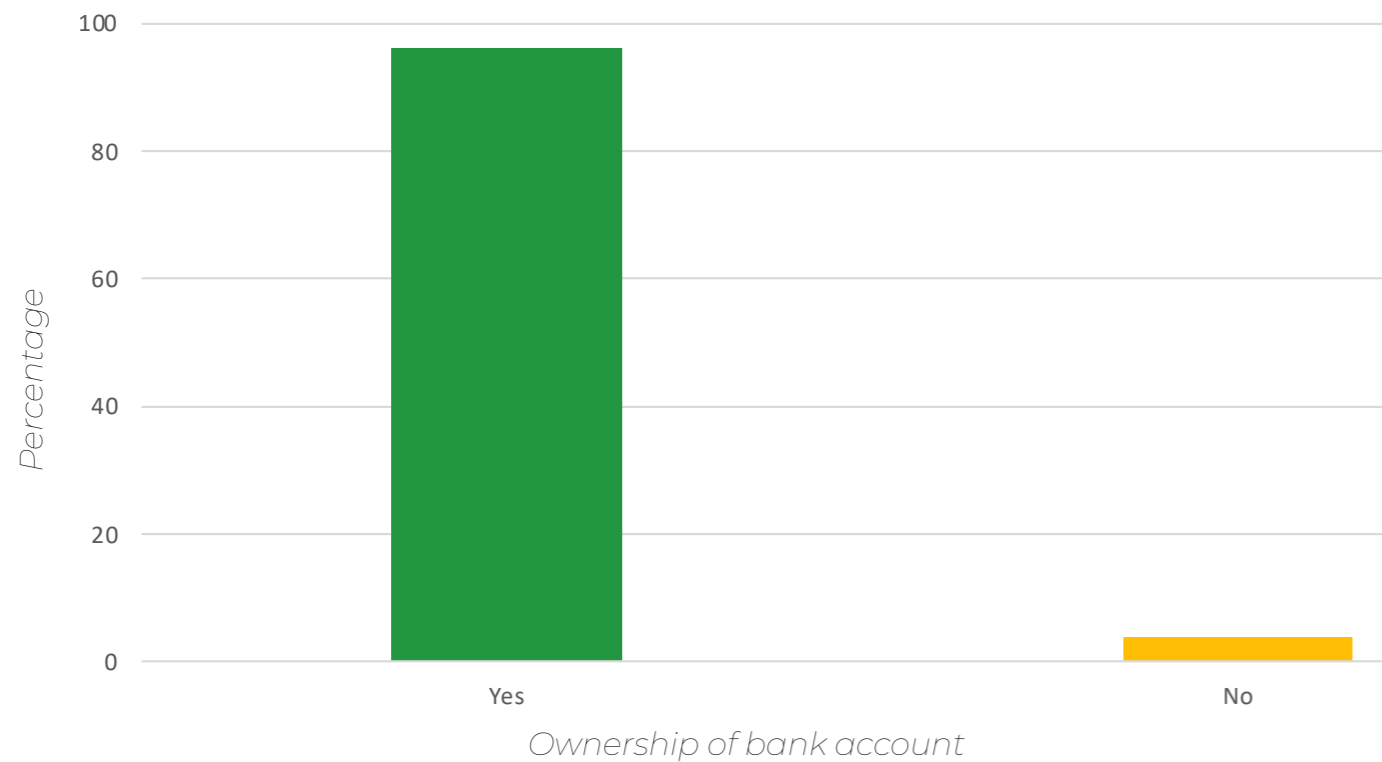
It is worthy of mention that there is only one large organisation in our sample. However this is not a fair picture of the spectrum of the entire Black community's income range as the call for Common Call Fund Two specifically states that we would only be funding organisations with an income under £500K.

As shown in Figure 8 on page 20, 36 organisations did not receive any income during the period under review, 128 organisations representing 21.23% had income of up to £10,000 and 109 organisations representing 18.1% had income of between £10,000 and £19,999. 59 organisations represented 9.8% reported income between £100,000 to £199,000, very few organisations reported income above £200,000 in the past year. Our findings elicit concerns over the sustainability of 273 organisations (45.4%) who earn less than £19,999 annually. Evidently, apart from organisations being underfunded, there is a wide income gap, highlighting the challenges faced by organisations whose incomes are above £250,000 (a typical cut off by funders for small grants) and those with incomes of greater than £250,000 but less than £500,000. Due to funder cut-offs, these organisations could be systematically excluded from accessing grants, because as organisations grow past a certain income threshold, the funders that supported them are unable to provide grants any longer due to eligibility criteria in terms of income threshold. Preliminary findings indicate that there is not enough support from the sector to ingratiate Black led organisations into social investment to help them bridge that gap. This will be further explored, and findings presented in a future report.

Ownership of Bank Accounts

Our findings show that though 96% of the 601 organisations that completed Common Call Two funding applications have bank accounts, 4% do not. Considering the importance of financial inclusion for individuals, communities, and enterprises, we will examine the factors responsible for non-ownership of bank accounts. Thereafter, we intend to work with organisations who do not currently have a bank account, as well as financial institutions to explore how identified barriers can be addressed. More specifically, we are interested in the effect of non-brick and mortar banks (challenger banks) on fundraising activities. This is especially as most funders require the organisation to have a bank account as well as two signatories. This is not possible with challenger bank accounts who typically accommodate only one signatory (see Table 12 in the Appendix).

Figure 9: Ownership of bank account



Sources of Income

Equally important is the source of income. Analysis reveals that the income of Black-led organisations is derived from multiple, often overlapping sources including grants, bank loans as well as personal savings of Directors.

352 organisations reported income from 'Grants Only', Charities were the most represented (39.2%). Next is Community Interest Companies (28%). Again, this is unsurprising based on the number of organisations with this structure and requirements of funders especially with respect to asset lock. Next is Charitable Incorporated Organisation with 10.2% reporting income from Grants Only. While not surprising, it is worthy of mention that companies limited by shares and partnership who reported income from grants only accounted for 0.9% and 0.3% respectively. This suggests that regardless of social objectives and impact, organisations with these legal frameworks/structures do not typically attract/receive grants arising from the legal structure of their organisations. Funders typically request asset locks in place and where this is not the case, irrespective of social objective and impact, it becomes a challenge. We will explore this further in an upcoming report.

96% of the 601 organisations that completed the funding applications have a bank account



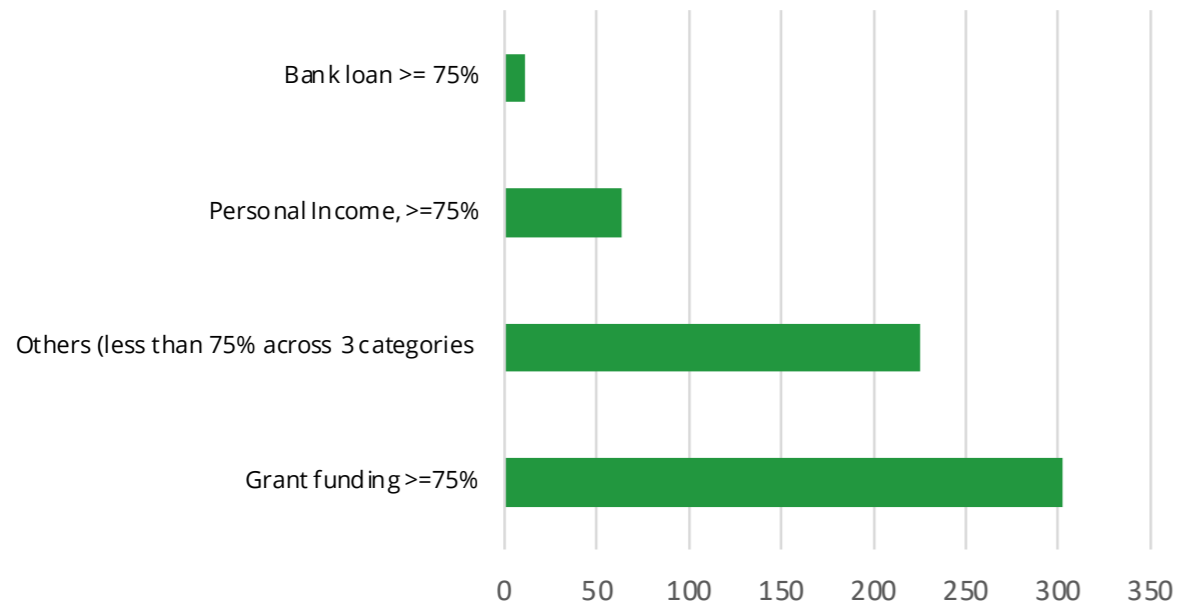
Key Findings on Breakdown of Top Income Sources

Findings from our analysis indicate that there are overlapping sources of income (For more information, see Table 13 in the Appendix). Generally, grants represent a substantial source of income for Black led organisations. 119 organisations, representing 19.8%, reported that 100% of their income were from grants, while 125 organisations, representing 20.8%, had no income from grants. Additionally, 393 organisations representing 65.4% did not report any income from the personal income and savings of Directors, 54 organisations representing 8.99% derive 100% of their income from personal income and savings of Directors and Management Team, as well as from PayDay Loans. This affects the general income of the Directors who are essentially funding projects and supporting communities through personal sacrifice. It is remarkable that 93 organisations, with social missions are funded solely from the personal income of Directors, Trustees, and Management team. Most of the organisations in that reality are Limited Companies by Shares, Unincorporated Organisations and Community Interest Companies Limited by Shares. Income from Bank Loans are not as common as income from grants and personal income/savings. For instance, only 4 organisations representing 0.7% reported 100% income from only Bank Loans.

Breakdown of Top Income Sources

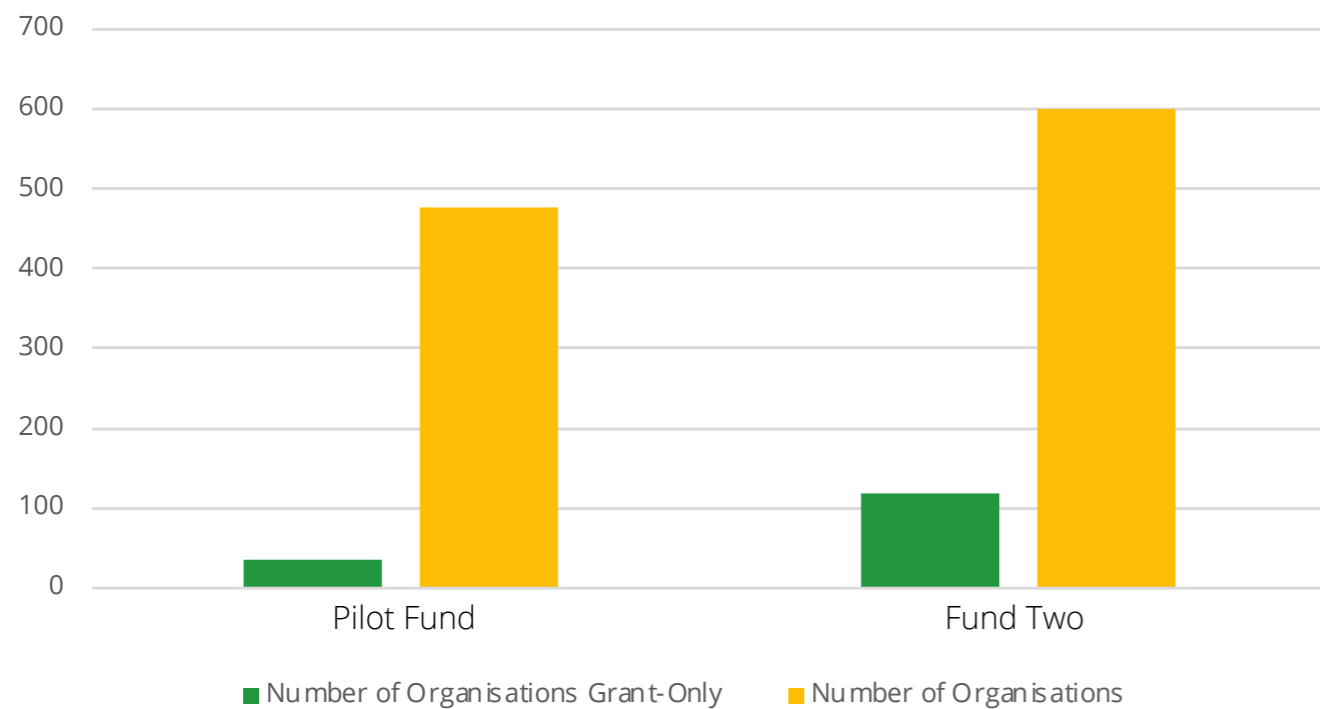
Three major sources of income are identified. Grants, Bank loans and Personal savings, with income obtained from 'Grants only' accounting for 58.6% of total annual income. As there are overlapping sources of income, we were interested in sources of income that represented over 75% of organisations total income across the three main identified income streams. As shown in the figure below, grants represent the highest source of income (75% and over) while bank loans had the least. (See Table 15 in the Appendix).

Figure 10: Source of income 75% and above



Findings from Common Call One and Two suggest there has been an increase in income from grants funding. This is shown in the figure below. (See Table 16 in the Appendix).

Figure 11: Common Call Pilot Fund and Fund Two: Income as Grants only



Preliminary analysis suggests that there are several factors responsible for this. These include increased awareness, availability of more grants and increasing focus on grant funding for improved income. Furthermore, corporations have not rebounded in terms of streams of income.



Outcome Areas

Findings indicate that organisations work across several outcome areas (see Table 8 in the Appendix). For this analysis, we were interested in their primary outcome areas. Breakdown of outcome areas is as shown in figure below.

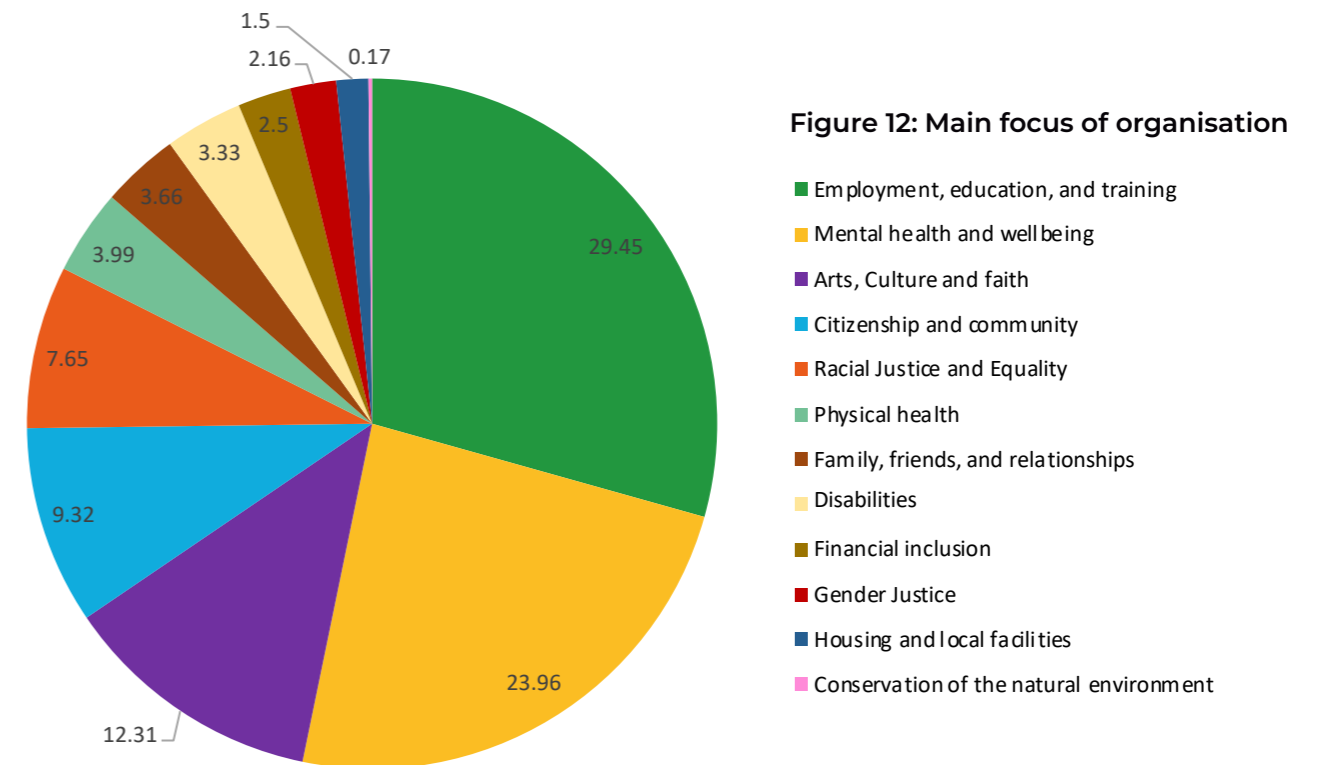


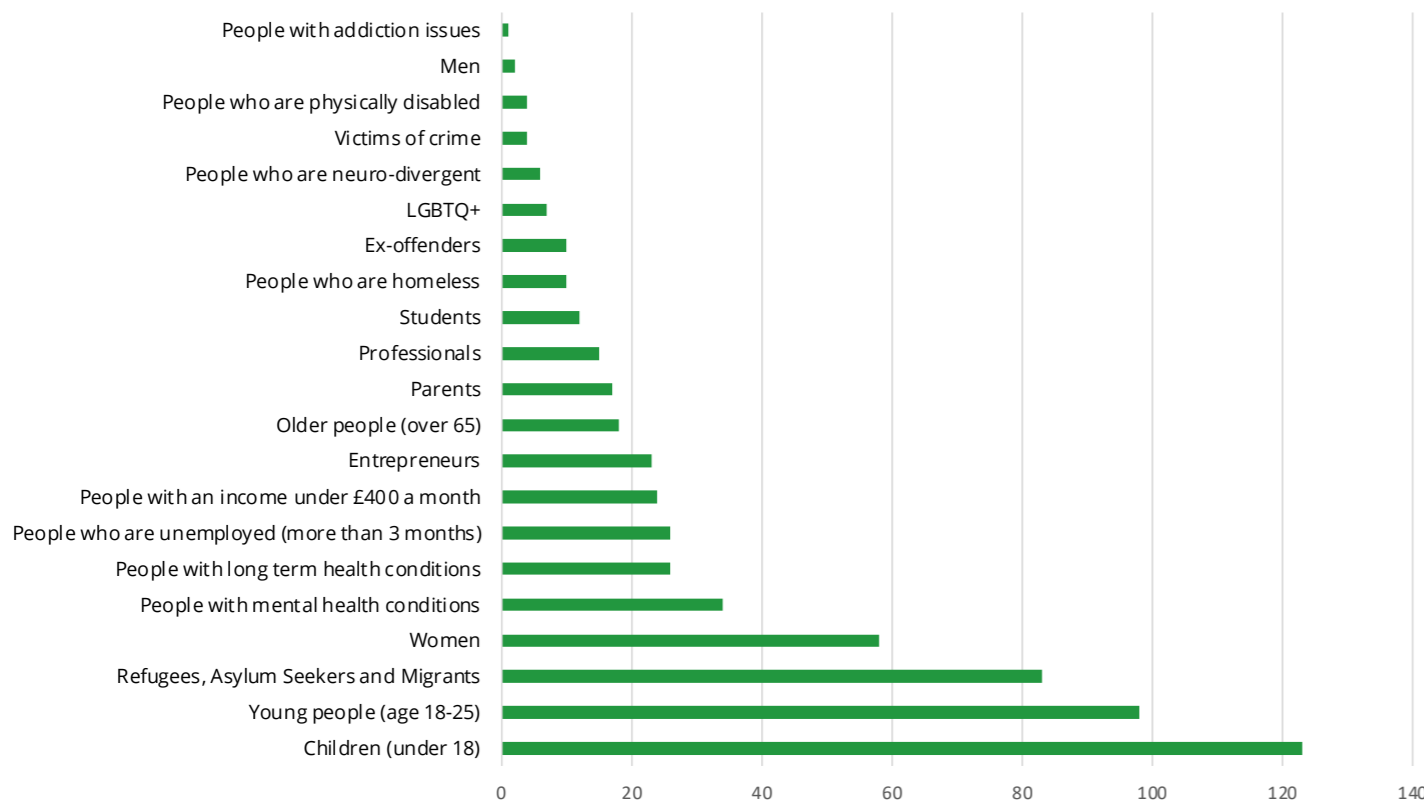
Figure 12: Main focus of organisation

The top 5 outcome areas accounted for are 'Employment, Education and Training' (30%), 'Mental Health and well-being' (24%), 'Arts, Culture, and Faith' (12%), 'Citizenship and Community' (9%) and 'Racial justice and Equality'(8%). This provides useful insight into some of the key challenges facing the Black community and the groups working to address those issues. The findings suggest that employment is one of the most pressing challenges for Black communities in the UK. This is unsurprising considering that unemployment rates are significantly higher for ethnic minorities at 12.9% compared to 6.3% for their White counterparts (Equality and Human Rights Commission, 2020). There is a need for more funding channelled towards organisations that seek to promote employability or create employment for individuals from Black communities. The top three outcome areas differ between the Common Call Pilot Fund and Fund Two, the most remarkable difference found in outcomes relating to 'Art, Culture, and Faith'. Previously 'Art, Culture, and Faith' outcomes was the second lowest outcome area while it is now present in the top three areas and accounts for 12%. This may provide an insight into the potential shift of the landscape of Black communities and associated areas for support.

Demography of Support

Although organisations typically support multiple groups, our analysis focuses on the main demographic Black-led organisations support and whether the organisations have lived experiences of the problems they seek to solve. Breakdown of demography is as shown in the figure below. (See Table 9 in the Appendix).

Figure 13: Demography

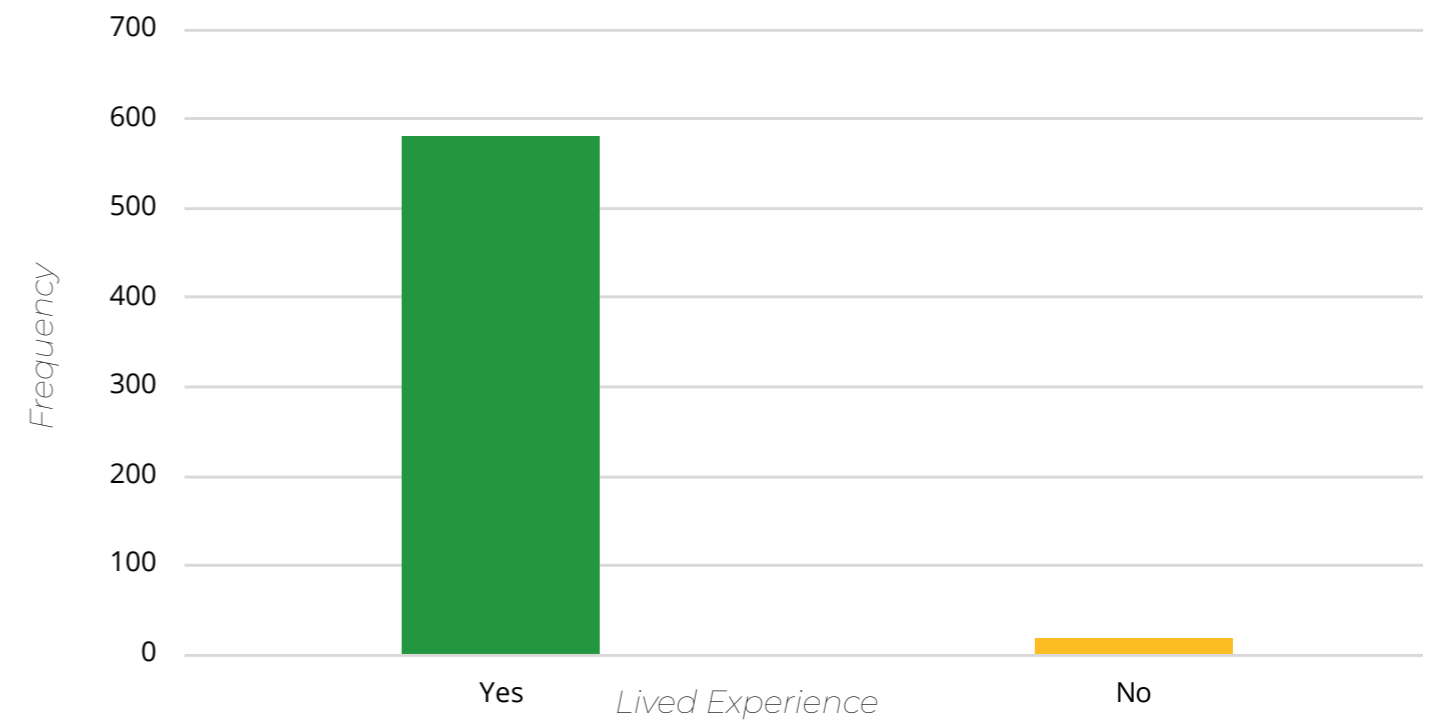


Top 5 demographic focus are: Children (21%), Young people (18-25) (16%), Refugees, Asylum Seekers and Migrants (14%), Women (10%) and Low-income earners-less than £400 a month (4%). Going by the outcome areas identified above, it is surprising that Individuals unemployed for more than 3 months (4%) as well as people with mental health conditions (6%) did not make the top five demographic list especially as they are part of the top three outcome areas. We intend to investigate this further in our upcoming reports. Our current hypothesis is that the organisations in our Fund Two pool, due to the under-funded nature of their work may not have the resources to work with the people that are furthest away from support and instead primarily work at the level of lower impact for less affected people. If this is the case, it would prove to be a disservice to the Black community and the people who run those organisations who are not able to provide the level of support that is truly needed by the community they serve. Another potential factor could be a lack of skills in the area that would support them to take responsibility for the deep impact work needed at the fringes of service provision for deeply under served populations. When coupled with the reality that most Black-led organisations are led by a Lived Experience Leader, it is incumbent upon the sector to support Lived Experience Leaders to become more effective in providing deep impact work for people at the fringes of the sector's existing service provision.

Lived Experience

Individuals with a strong understanding of local communities, and the prospects and problems faced by the people in them are better placed to provide support. Lived Experience Leadership is the premiere way to expand the reach of civil society into the so-called 'hard to reach' places.

Figure 14: Lived Experience



As shown in the figure above (see Table 10 in the Appendix), 97% of organisations have Lived Experience of the issues they seek to address. The high percentage of Leaders with Lived Experience tells a profound story about the impetus and drive for sector entry and continued existence. The organisations led by people with Lived Experience are addressing societal issues from a place of experience and lived expertise, and thus, should be effectively empowered to do so.

Summary, Next Steps & Recommendations

Geographical Spread

Most of the applications came from England. We aim to expand our outreach across the other nations in the UK to better understand the similarities, differences, and contextual challenges. This will enable us to expand and design our products and services according to needs. Additionally, an expanded network will be useful to stakeholders, funders, and policy makers.

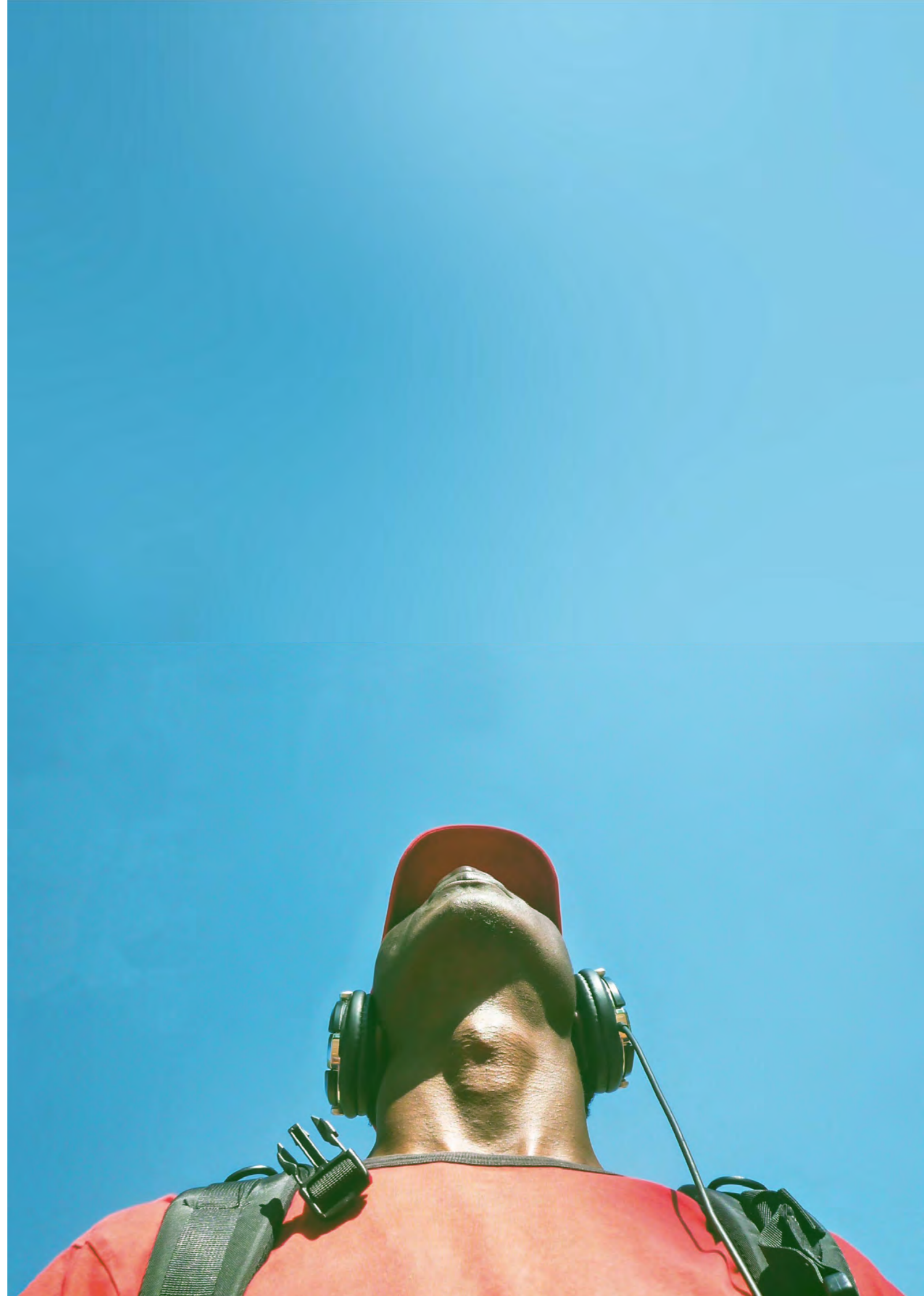
Income

Several Black-led organisations, typically micro and small, are struggling to remain afloat. These organisations, despite numerous challenges, are making a significant impact on their local communities. Black Individuals and families are over-represented in low-income groups and are more likely to be living in poverty than their white counterparts (Equality and Human Rights Commission, 2020). Therefore, the reliance on personal income is highly disturbing and proves even more that there is an urgent need to ensure Black-led organisations are funded and supported to do deep-rooted work in their local communities.

Fund Two was oversubscribed by almost 350% of the amount of funding we have available to disburse. As mentioned in our previous report, there is the need for significant direction of funds towards Black-led organisations specifically. As more funders embrace this concept of ring fenced funding for the specific communities that are most in need, we will find more individuals that are so-called 'hard to reach' will be able to engage with the sector through the Lived Experience Leadership of Black-led organisations, thereby diversifying access to support as well as the provision of that support.

Lived Experience

Evidence provided in this report indicates that Black-led organisations developed out of a significant challenge of Lived Experience. In addition to having a deep-rooted understanding of the problem based on their own experience, Black-led organisations also have cultural and linguistic similarities to the 'hard to reach' groups that the sector consistently fails to access. As a sector, we need to remove the barriers experienced by these organisations especially with regards to securing funds, training, and expertise for the transformative work they do.



Appendix

Table 1: Year vs Number of Registrations

Year	Number of Orgs
1975	2
1976	0
1977	1
1978	0
1979	0
1980	0
1981	1
1982	1
1983	0
1984	0
1985	1
1986	1
1987	1
1988	0
1989	2
1990	1
1991	0
1992	1
1993	1
1994	x
1995	2
1996	5
1997	1
1998	1
1999	0
2000	6
2001	20
2002	8
2003	1
2004	4
2005	7
2006	8
2007	10
2008	12
2009	16
2010	9
2011	10
2012	22
2013	22
2014	20
2015	35
2016	25
2017	26
2018	51
2019	89
2020	108
2021	68

Table 2: Structure of Organisation and Year of Organisation (2016-2021)

Structure	2016	2017	2018	2019	2020	2021	Total
Charitable Trust	1					1	2
Community Interest Company Limited by Guarantee	16	8	13	36	50	25	148
Limited Company by Guarantee	2	3	6	12	12	6	41
Limited Company by Shares	1	3	7	6	15	6	38
Charitable Incorporated Organisation	4	2	7	7	9	4	33
Community Interest Company Limited Company Limited by Shares	0	3	4	6	3	3	19
Limited by Partnership	0	0	1	0	0	0	1
Constituted not-for-profit group	0	3	3	5	6	1	18
Charity	4	3	9	15	5	6	42
Sole trader	0	0	0	2	4	6	12
Unincorporated	0	1	2	0	4	10	17

Table 3: Number of Applications per Nation

Nation	Number of Applications	Percentage
England	558	92.9
Scotland	32	5.3
N. Ireland	2	0.3
Wales	9	1.5
Total	601	100

Table 4: Amount requested per Nation

Nation	Amount requested (£)	Percentage
England	5,137,500	92.61
Scotland	310,000	5.59
N. Ireland	17,500	0.32
Wales	82,500	1.49
Total	5,547,500	100

Table 5: Structure, Nation and Number of Organisations

Structure of Organisation	England	N. Ireland	Scotland	Wales	Total
Charitable Incorporated Organisation	38	0	3	2	43
Charitable Trust	5	0	1	0	6
Charity	144	0	16	4	164
Community Interest Company Limited by Guarantee	169	0	6	0	175
Community Interest Company Limited Company Limited by Shares	26	1	0	0	27
Constituted not-for-profit group	20	0	3	0	23
Limited by Partnership	1	0	0	0	1
Limited Company by Guarantee	60	0	1	1	62
Limited Company by Shares	44	0	0	0	44
Sole Trader	17	0	0	0	17
Unincorporated/Not Registered	34	1	2	2	39
Total	558	2	32	9	601

Table 6: Structure of Organisation Vs Annual Income

Structure of Organisation	Income (£)	Percentage
Charitable Incorporated Organisation	3,002,992.78	7.77
Charitable Trust	410,387.00	1.06
Charity	17,455,506.71	45.15
Community Interest Company Limited by Guarantee	7,350,815.97	19.01
Community Interest Company Limited Company Limited by Shares	1,532,064.69	3.96
Constituted not-for-profit group	497,083.10	1.29
Limited by Partnership	20,000.00	0.05
Limited Company by Guarantee	7,086,477.16	18.33
Limited Company by Shares	925,590.78	2.39
Sole Trader	131,892.15	0.34
Unincorporated/Not Registered	252,246.23	0.65
Grand Total	38,665,056.57	100

Table 7: Income range vs Number of Organisations

Income range (£)	Frequency	Percentage
0	36	5.99
1-9,999	128	21.29
10,000-19,999	109	18.14
20,000- 29,999	58	9.65
30,000- 39,999	39	6.49
40,000- 49,999	33	5.49
50,000- 59,999	31	5.16
60,000- 69,999	21	3.49
70,000- 79,999	14	2.33
80,000- 89,999	21	3.49
90,000- 99,999	13	2.16
100,000- 199,999	59	9.82
200,000- 299,999	20	3.33
300,000- 399,999	9	1.50
400,000- 499,999	6	0.99
500,000- 599,999	1	0.17
600,000- 699,999	0	0
700,000- 799,999	1	0.17
800,000- 899,999	1	0.17
900,000- 999,999	0	0
1,000,000- 1,999,999	0	0
2,000,000- 2,999,999	0	0
3,000,000- 3,999,999	0	0
4,000,000- 4,999,999	1	0.17

Table 8: Outcome Areas

Outcome Areas	Frequency	Percentage
Arts, Culture and faith	74	12.31
Citizenship and community	56	9.32
Conservation of the natural environment	1	0.17
Disabilities	20	3.33
Employment, education, and training	177	29.45
Family, friends, and relationships	22	3.66
Financial inclusion	15	2.5
Gender Justice	13	2.16
Housing and local facilities	9	1.5
Mental health and wellbeing	144	23.96
Physical health	24	3.99
Racial Justice and Equality	46	7.65
Total	601	100

Table 9: Demography

Demography	Frequency	Percentage
Children (under 18)	123	20.46
Entrepreneurs	23	3.83
Ex-offenders	10	1.66
LGBTQ+	7	1.17
Men	2	0.33
Older people (over 65)	18	3
Parents	17	2.82
People who are homeless	10	1.66
People who are neuro-divergent	6	0.99
People who are physically disabled	4	0.67
People who are unemployed (more than 3 months)	26	4.33
People with addiction issues	1	0.17
People with an income under £400 a month	24	3.99
People with long term health conditions	26	4.33
People with mental health conditions	34	5.66
Professionals	15	2.5
Refugees, Asylum Seekers and Migrants	83	13.81
Students	12	2
Victims of crime	4	0.67
Women	58	9.65
Young people (age 18-25)	98	16.3
Total	601	100

Table 10: Lived Experience-led

Category	Frequency	Percentage
Yes	582	97
No	19	3
Total	601	100

Table 11: Structure of Organisation vs Annual Income

Organisational structure	No of organisations	Percentage representation in sample	Amount (£)	% Representation of income by structure of organisation
Charitable Incorporated Organisation	43	7.2	3002992.78	7.77
Charitable Trust	6	1	410387	1.06
Charity	164	27.3	17455506.71	45.15
Community Interest Company Limited by Guarantee	175	29.1	7350815.97	19.01
Community Interest Company Limited Company Limited by Shares	27	4.5	1532064.69	3.96
Constituted not-for-profit group	23	3.8	497083.1	1.29
Limited by Partnership	1	0.2	20000	0.05
Limited Company by Guarantee	62	10.3	7086477.16	18.33
Limited Company by Shares	44	7.3	925590.78	2.39
Sole Trader	17	2.8	131892.15	0.34
Unincorporated/Not Registered	39	6.5	252246.23	0.65
Total	601	100	38665056.57	100

Table 12: Ownership of Bank Account

Categories	Frequency	Percentage
Yes	578	96.2
No	23	3.8
Total	601	100

Table 13: Sources of Income

Source of Income	Frequency	Percentage
Business Bank loan	2	0.3
Competition winnings	2	0.3
Grant funding	352	58.6
Grant funding, Business Bank loan	5	0.8
Grant funding, Business Bank loan, Social investment loan	2	0.3
Grant funding, Competition winnings	8	1.3
Grant funding, Competition winnings, Business Bank loan	2	0.3
Grant funding, Competition winnings, Social investment loan	1	0.2
Grant funding, Social investment loan	3	0.5
Personal employment income (of the Directors, Board or Leadership Team)	21	3.5
Personal employment income (of the Directors, Board or Leadership Team), Grant funding	29	4.8
Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2	0.3
Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	1	0.2

Table 13: Continued

Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Payday loan (of the Directors, Board or Leadership Team)	1	0.2
Personal loan (of the Directors, Board or Leadership Team)	1	0.2
Personal loan (of the Directors, Board or Leadership Team), Grant funding	7	1.2
Personal savings (of the Directors, Board or Leadership Team)	42	7
Personal savings (of the Directors, Board or Leadership Team), Business Bank loan	2	0.3
Personal savings (of the Directors, Board or Leadership Team), Competition winnings	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Grant funding	41	6.8
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	4	0.7
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Competition winnings	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Competition winnings, Business Bank loan	2	0.3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team)	25	4.2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Business Bank loan	3	0.5
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Business Bank loan, Social investment loan	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding	26	4.3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2	0.3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Competition winnings	2	0.3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team)	2	0.3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Business Bank loan	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team)	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Business Bank loan	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding	1	0.2
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2	0.3
Total	601	100

Table 14: Structure of Organisation vs Number of Applications

Structure of Organisation	Frequency	Percentage
Charitable Incorporated Organisation	43	7.2
Charitable Trust	6	1
Charity	164	27.3
Community Interest Company Limited by Guarantee	175	29.1
Community Interest Company Limited by Shares	27	4.5
Constituted not-for-profit group	23	3.8
Limited by Partnership	1	0.2
Limited Company by Guarantee	62	10.3
Limited Company by Shares	44	7.3
Sole Trader	17	2.8
Unincorporated/Not Registered	39	6.5
Total	601	100

Table 15: Source of Income 75% and above

Category	Frequency	Percentage
Bank loan >= 75%	11	1.83
Grant funding >=75%	302	50.25
Personal Income, >=75%	63	10.48
Others (less than 75% across 3 categories)	225	37.44
Total	601	100

Table 16: Grants only for Pilot Fund and Fund Two

	Number of Organisations Grant-Only	Number of Organisations	% of Orgs Grant-Only
Pilot Fund	36	478	7.53
Fund Two	119	601	19.8

Table 17: Source of Income

Source of Income	No of Orgs
Business Bank loan	2
Competition winnings	2
Grant funding	352
Grant funding, Business Bank loan	5
Grant funding, Business Bank loan, Social investment loan	2
Grant funding, Competition winnings	8
Grant funding, Competition winnings, Business Bank loan	2
Grant funding, Competition winnings, Social investment loan	1
Grant funding, Social investment loan	3
Personal employment income (of the Directors, Board or Leadership Team)	21

Table 17: Continued

Personal employment income (of the Directors, Board or Leadership Team), Grant funding	29
Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2
Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	1
Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Payday loan (of the Directors, Board or Leadership Team)	1
Personal loan (of the Directors, Board or Leadership Team)	1
Personal loan (of the Directors, Board or Leadership Team), Grant funding	7
Personal savings (of the Directors, Board or Leadership Team)	42
Personal savings (of the Directors, Board or Leadership Team), Business Bank loan	2
Personal savings (of the Directors, Board or Leadership Team), Competition winnings	1
Personal savings (of the Directors, Board or Leadership Team), Grant funding	41
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	4
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Competition winnings	1
Personal savings (of the Directors, Board or Leadership Team), Grant funding, Competition winnings, Business Bank loan	2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team)	25
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Business Bank loan	3
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Business Bank loan, Social investment loan	1
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding	26
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Grant funding, Competition winnings	2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team)	2
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Business Bank loan	1
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding	1
Personal savings (of the Directors, Board or Leadership Team), Personal employment income (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	1
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team)	1
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Business Bank loan	1
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding	1
Personal savings (of the Directors, Board or Leadership Team), Personal loan (of the Directors, Board or Leadership Team), Grant funding, Business Bank loan	2
Grand Total	601

Table 18: Structure of Organisations

Structure of Organisation	Frequency	Percentage
Charitable Incorporated Organisation	43	7.2
Charitable Trust	6	1
Charity	164	27.3
Community Interest Company Limited by Guarantee	175	29.1
Community Interest Company Limited Company Limited by Shares	27	4.5
Constituted not-for-profit group	23	3.8
Limited by Partnership	1	0.2
Limited Company by Guarantee	62	10.3
Limited Company by Shares	44	7.3
Sole Trader	17	2.8
Unincorporated/Not Registered	39	6.5
Total	601	100

Table 19: Breakdown of amounts requested by organisations

Amount	No of organisations	Total (£)	Percentage
£12,500	339	4,237,500	56
£5,000	262	1,310,000	44
Total	601	5,547,500	100

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Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: Strategic Initiative – Increasing the quality and scale of giving and capacity building for London’s social enterprises (Ref: 19714)	Public
Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> 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 (£388,260 funding allocation from BHE designated grant making fund)
Report of: David Farnsworth, Managing Director of BHE	For Decision
Report Authors: Tim Wilson, Funding Director Catherine Hobbs, Funding Manager	

Summary

This report requests £388,260 over three years as a strategic initiative to the School for Social Entrepreneurs. Funding would support the charity’s work to build the digital infrastructure for a capacity-building and enterprise development programme for London-based and London-focused social purpose organisations. Funding will also be used to provide enterprise support to 20 groups whose work is aligned to City Bridge Trust’s (CBT) mission and values. CBT has a long-standing engagement with issues of capacity building and, through its Stepping Stones programme, with enterprise development. School for Social Entrepreneurs has a proven track record supporting a diverse range of social purpose businesses, and the match trading platform recommended by this strategic initiative is a means to scale already successful work.

Recommendation

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity’s best interests:

- i) Approve £388,260 over three years (£16,500; £188,830; £182,930) to the School for Social Entrepreneurs to develop a match trading portal and provide match trading grants to London-focused social enterprises.

Main Report

Background

1. The term “social enterprise” is relatively new, only dating back to the 1980s. It is generally understood to mean a focus on social, environmental and/or cultural issues with a business-like delivery. Social enterprise describes an approach, and

the term covers a range of legal forms, including Community Interest Companies and trading arms of registered charities. The movement's umbrella body, Social Enterprise UK, estimates there are over 100,000 social enterprises in the UK, employing around 2 million people and contributing £60 billion to the economy. Social Enterprise UK has four hallmarks for when an organisation can be regarded as a social enterprise. For SEUK, a social enterprise must:

- a. Have a clear social or environmental mission set out in its governing documents and be controlled in the interests of that mission.
 - b. Re-invest or donate at least half of its profits or surpluses towards its mission.
 - c. Be independent of state or government control and earn more than half of its income through trading.
 - d. Be transparent in the way it operates and the impact it has.
2. The importance of trading means that social enterprises have a high reliance on markets for income. This can mean that social enterprises are more likely to thrive in richer communities but struggle in poorer ones. In turn, this can lead to grant-dependency for those social businesses working in areas of higher deprivation, and an inability to grow, which in turn means that poorer communities receive less social enterprise support than richer ones.
 3. "Match trading" (MT) provides grant funding to supplement income generated through trading. It is a simple mechanism designed to incentivise trading by providing pound for pound matches up to a pre-determined cap. MT support is intended to help social enterprises grow customer acquisition, boost financial resilience, develop sustainable business models, and enhance impact delivery in deprived communities. This is intended to strengthen the recipient organisations, making them more financially viable and better able to achieve sustained impact.
 4. MT was developed and pioneered by School for Social Entrepreneurs (SSE) in 2017 with pilot funding from the Lloyds Bank Foundation and the National Lottery. Since then, funders including Power to Change, Access, the Scottish Government, Esmée Fairbairn, Guys' & St Thomas', Rank, and Mercers have provided MT support to enterprises across the UK along with assistance to SSE's core costs. Over 650 enterprises have received grants to date with evidence indicating that MT recipients typically see income from trading increase by 64% (2.5 times the amount compared to those in a control group receiving 'traditional' grants).
 5. Work to date has been overseen by a MT task force which includes a dedicated equity, diversity, and inclusion partner (Voice4Change England). SSE reports that (nationally), 25% of MT-funded organisations have been led by people from ethnic minority backgrounds. The MT model was referenced by Government in February 2022 with a specific focus on its use in disadvantaged places.

School for Social Entrepreneurs – background

6. School for Social Entrepreneurs (SSE) was founded in 1997 by Lord Michael Young. A registered charity, it works across the UK, India, and Canada to run courses, providing funding and mentor people who want to start, scale and/or

strengthen organisations focused on positive difference. Independent evaluation indicates that organisations supported by SSE have a 66% five-year survival rate compared to 44% for pure-profit businesses in the UK.

7. CBT has not previously funded SSE, although it has supported several successful applicants to the *Stepping Stones* programme. Additionally, SSE was a partner along with Impact Hub Kings Cross in CBT's grant to Social Enterprise UK exploring options for a dedicated social enterprise building.

Background and detail of proposal

8. SSE approached CBT in late 2021 seeking funds to develop a "MT Funder Portal", with pilot work focused on London. SSE hopes the portal will boost the growth of match trading by changing the way funders are engaged from requests to support resilience and trading (which SSE says is not core to many grant-making programmes) to a focus on place and social issues (which should be easier to align with main grant programmes). The inspiration here is London Funders' Covid response portal which was used successfully during the pandemic as a shared platform to help grant providers identify organisations and approaches that were of interest to their work.
9. The MT Portal will be designed as a 'one-stop shop' for funders to:
 - a. Discover, fund and support social enterprises and trading charities.
 - b. Enhance inclusivity and access by using a common application form used across multiple funders.
 - c. Improve efficiency by collecting and validating trade data to release matched grant amounts.
 - d. Reduce administrative time for funders through effective use of technology and automation.
 - e. Support peer learning.
 - f. Use data to provide insights segmented by place and theme.
10. Although outside scope of this funding request, SSE plans to work with the London School of Economics' Marshall Institute on a qualitative research project to examine the impact of match trading on organisational behaviours and social outcomes.
11. The MT Portal is ultimately intended to support social enterprises across the UK but SSE plans to begin work on London activity. This will allow the development of data protocols, localised user-testing and initial work on gathering and disseminating learning before the portal is scaled.
12. SSE seeks a 20% contribution to the MT portal development costs from CBT and intends to secure the balance via a national partnership it is currently securing. Whilst this balance is not yet confirmed from external sources, SSE's trustees have pledged to underwrite the costs of remaining development costs through reserves, meaning that any CBT contribution can begin without delay. The end goal is a thriving MT portal that allows funders to identify high-quality social enterprise organisations delivering work in line with those grant-makers' own vision, mission, and funding priorities.

13. CBT is also asked to support 20 social enterprises in Greater London through a two-cohort-based learning scheme and match trading grant programme. These organisations would receive support to develop sustainable business models, increase their trading income, and strengthen resilience. They would receive tailored support and benefit from peer learning.
14. SSE believes that many of the organisations appearing on the portal would meet CBT's eligibility criteria for grant funding. CBT and SSE will work collaboratively to select social themes and/or geography and ensure that enterprise grantees match CBT's eligibility criteria.

Budget

	2022/23	2023/24	2024/25
<i>Match trading portal development</i>			
Project management	£7,320	£3,520	-
Developer costs	£4,000	£2,000	-
Impact management	£2,340	£3,510	£3,510
Stakeholder engagement	£2,840	£4,800	£4,420
<i>Match trading grants & enterprise learning</i>			
Reach recruitment & assessment		£14,000	£14,000
Delivery costs		£58,000	£58,000
Monitoring & evaluation		£3,000	£3,000
Match trading grants (£10k per participant)		£100,000	£100,000
TOTAL	£16,500	£188,830	£182,930

Financial information

15. A review of SSE's previous set of audited accounts shows the organisation is in a positive financial position. Its income has fluctuated over the last five years but grew significantly in 2021 and 2022 due to the organisation's role in distributing the Social Enterprise Support Fund (SESF) which provided financial support to social entrepreneurs during the Covid-19 pandemic. The majority of SSE's income is generated through restricted charitable grants, (88% of overall income for 2021, up from 76% in 2020) including a large £3.35m grant from the National Lottery Community Fund towards the SESF. Outside of this, other restricted sources are numerous and diverse.
16. The organisation's reserves policy dictates that reserves must reflect the cost of central overheads for 12 months, as well as the costs of closure or restructure and the required funds for investment activity. Accounts demonstrate that the charity has exceeded this target for both 2020 and 2021 and projected figures to 2023 continue to show a reserves figure above the reserves policy target. Restricted deficits are managed through higher restricted reserves accumulated in previous years and a large unrestricted donation will provide the opportunity to designate part of the reserve fund for future programmes. The charity has secured 44% of its income against 81% confirmed expenditure for 2023 but has healthy levels of

surplus free reserves to meet any potential excess expenditure costs even with income levels returning to reduced levels after the temporary increase of the SESF.

Year end as at	2021 Signed Accounts £	2022 Forecast £	2023 Budget £
Income & expenditure:			
Income	8,645,248	10,278,759	5,519,053
Expenditure	(8,515,162)	(9,998,251)	(6,095,506)
Gains/(losses)	96,118	0	0
Surplus/(deficit)	226,204	280,508	(576,453)
Reserves:			
Total restricted	956,504	977,376	249,923
Total unrestricted	1,215,051	1,474,687	1,625,687
Total reserves	2,171,555	2,452,063	1,875,610
Of which: free unrestricted	1,189,845	1,449,481	1,600,481
Reserves policy target	900,000	900,000	900,000
Free reserves over/(under) target	289,845	549,481	700,481

Conclusion

17. The proposed strategic initiative complements CBT's work to increase the quality and scale of giving and is in line with BHE's joint Philanthropy Strategy. BHE's Philanthropy Director was involved in early discussions with SSE that led to the development of this proposal. Initial match trading data, gathered from independent assessment of income gains is encouraging and the proposed portal a good means of scaling work. CBT's support at this point could be catalytic and is recommended to the Committee.

Appendix

- Appendix 1: Strategic Initiative Filters

Tim Wilson

Funding Director & Social Investment Fund Manager

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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: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: London's Giving Strategic Development Fund	Public
Which outcomes in the <i>BHE Bridging London 2020 – 2045 Strategy</i> 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 BHE designated grant making fund)
Report of: David Farnsworth, Managing Director of BHE	For Decision
Report Author: Jenny Field, Consultant	

Summary

City Bridge Trust (CBT) has been a long-term supporter of place-based giving schemes (PBGS), most recently under the Connecting the Capital funding strand. In addition, CBT supports the development and capacity building of local giving schemes through the London's Giving strategic initiative which is hosted by London Funders. These funding streams support both the Bridging Divides funding strategy (in particular, the strategic aim to grow stronger, more resilient and thriving communities in London) as well as the joint BHE & City Corporation Philanthropy Strategy (in particular, the strategic aim to support and raise awareness of high quality giving in the capital). In addition, the Grants Committee have approved proposals for a Strategic Development Fund to enhance and complement existing support for London's Giving which was launched on 3 February 2022, with a closing date of 17 March 2022. The purpose of this report is to update the Grants Committee on this funding initiative and to seek approval for five grants over £250k as part of the London's Giving Strategic Development Fund.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Receive this report and note its contents.
- ii) Approve the five grants towards London's Giving Strategic Development Fund as recommended in Appendix 1 – 5.

Main Report

Background to London's Giving

1. CBT's engagement with place-based giving schemes (PBGS) began in 2011 when it became a founder funder of Islington Giving as a Strategic Initiative with a grant of £119,500 over three years approved in April 2011. This was at a time when the appetite to establish PBGS was growing amongst London's communities and CBT supported a number of emerging schemes as Strategic Initiatives.

2. Inspired by the success of Islington Giving, CBT have also been supporting the promotion and development of PBGS since February 2014. This launched as [London's Giving](#) in February 2015 and is hosted by London Funders. As well as a range of online resources, news items and articles, London's Giving provides one to one support to individual schemes, regular network learning events and, in partnership with Rocket Science, enables local schemes to use shared impact measurement tools.
3. Since April 2018, funding for PBGS have been a stated priority under the [Connecting the Capital](#) strand of the Bridging Divides programmes.
4. Support of PBGs, as examples of pioneering and impactful philanthropic approaches incorporating the giving of both time and other assets, also supports BHE's and the City Corporation's (CoLC) Joint Philanthropy Strategy, which outlines BHE's and CoLC's aim to contribute to higher impact and higher value philanthropy through support and awareness-raising in the UK and internationally.

What is a Place-Based Giving Scheme?

5. A PBGS is a partnership, initiative, or organisation which understands, highlights, and responds to local needs. It is more than a distributor of grant-funding to local communities. Schemes aim to bring together the public, private and voluntary sectors to bring about real change in local communities and to unlock resources and assets (financial and non-financial) for the benefit of those communities.
6. There is no blueprint or 'one size fits all' template for PBGS. Every scheme in London is different, depending on local conditions but they all share the same principles, developed by London's Giving. These are:
 - a. Recognising that everyone has something to give: time, talent and resources
 - b. Building a shared understanding of local aspirations and needs, not driven by donors or funders
 - c. Listening to local people and encouraging them to participate in decision-making
 - d. Collaborating with partners to find better ways to improve places
 - e. Independence from any one stakeholder; all partners have an equal voice
7. Whilst some PBGS have become independent charitable organisations in their own right (e.g. Camden Giving), other are hosted as a restricted fund of a suitable local organisation (e.g. Hackney Giving hosted by Hackney Council for Voluntary Service) or local funder (e.g. Islington Giving hosted by Cripplegate Foundation).
8. Currently, there are 14 active PBGS in London with a further six in development. The latest impact report can be found [here](#).

Strategic Development Fund

9. As part of the Interim Review of Bridging Divides, the Grants Committee agreed that work should be undertaken to further support the development of London's Giving and PBGS at your September 2021 meeting, with £7m being earmarked for this

purpose. A consultation meeting was held in November 2021 with the London's Giving Network. From this, a Task and Finish Group was established, comprising representatives from the Network, London Funders and the BHE staff team which co-designed the funding guidelines for the Strategic Development Fund (SDF).

10. As reported in the Managing Director's report at the Grants Committee meeting in June 2022, work is also underway on a further two ideas that emerged from the Task and Finish Group. One of these was to build on the work of London's Giving to establish a Resource Hub for PBGS. The other was to establish a Challenge/Match Fund to enable local schemes to leverage funding from new donors. Following a competitive tendering process, consultants TSIP and Deborah Xavier are scoping the feasibility of these two ideas. This scoping is due for completion in the autumn and the fundings will be reported to the Grants Committee meeting in December 2022.
11. The SDF launched on 3 February 2022 with a closing date of 17 March 2022. Applications were invited for work to:
 - a. Accelerate the strategic development of schemes.
 - b. Test different models of participatory giving and engagement.
 - c. Seed-fund new and emerging schemes where the funding can leverage additional resources.
 - d. Pool resources amongst local schemes.
 - e. Enable a local scheme(s) to take on specific expertise through a third party, such as, but not limited to, web development; use of data; marketing; development of grants systems.
12. Applicants were also advised that it was envisaged that *"...most grants being up to around £250,000 but this is only indicative, and we can award more or less than this amount depending on the nature of the application"*.
13. 19 applications were received in total. Of these, two were not from PBGS and are recommended for rejection at today's meeting. Following assessment, a further three applications were considered insufficiently strong to merit a grant recommendation, and these are also recommended for rejection today at Appendix 5 at Item 16.
14. Five applications are recommended for funding today at Appendix 1 -5, whilst three others will be brought to the December 2022 meeting. The remaining six are recommendations for grants of <£250,000 and will therefore be dealt with by Delegated Authority.

Conclusion

15. There is a growing belief in the importance of place, not least within Government and amongst think tanks and funders. The pandemic brought the importance of place into even sharper relief as we all spent more time in our neighbourhoods. During the pandemic, a number of PBGS played an important role in getting funding and resources to where they were most needed.

16. However, establishing a PBGS takes time and patience. Many local schemes have limited resources – often just one or two part-time members of staff. It is hoped that the SDF will help the funded schemes get to the next level in their development. The longer-term role of CBT with regard to PBGS will to some extent, at least, be informed by the feasibility work currently underway as described in paragraph 9.

Appendices – London’s Giving Strategic Development Fund – Grant Recommendations over £250k

- Appendix 1 – Camden Giving (19288)
- Appendix 2 – Barking & Dagenham Giving (19287)
- Appendix 3 – Merton Voluntary Service Council (19289)
- Appendix 4 – The Bridge Renewal Trust (19307)
- Appendix 5 - Richmond Parish Lands Charity (RPLC) (19294)

Jenny Field

Consultant

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Appendix 1 – Camden Giving

MEETING 26th September 2022

Ref: 19288

ASSESSMENT CATEGORY: Bridging Divides - London's Giving: Strategic Development Fund

Camden Giving

Amount requested: £281,117

Amount recommended: £259,300

Adv: Clara Espinosa

Base: Camden

Benefit: Camden

Purpose of grant request: to develop a participatory governance structure through the alumni network, allowing more people experiencing inequality to make decisions about social change in Camden.

The Applicant

Camden Giving's main objective is to invest in projects in Camden that overcome inequality. Based on a notion that everyone has something to give; be that time, skills, or money, it channels those resources into grassroots community action that responds to local challenges. Originally hosted by Voluntary Action Camden (VAC, the council for voluntary service in the LB Camden), Camden Giving (CG) was launched in April 2017 as part of the London's Giving movement. CG registered as a charitable incorporated organisation (CIO) in August 2017.

CG supports grassroots community activities that provide immediate relief of key issues in Camden, including wealth inequality, environment issues, social cohesion, and community safety. It connects residents to volunteering opportunities, participatory funding, resident decision-making groups and employment opportunities. It prioritises shifting power to a varied range of voices from the local community enabling them to make funding decisions.

Background and detail of proposal

In the four years since its launch, CG has become a leader in the field of participatory grant-making (PGM) and has worked with 198 panellists. The two significant pieces of funding; the KX Fund and the HS2 Camden Fund have enabled Camden Giving to fund a wide range of grass-roots projects, and it has used its partnerships with local businesses to leverage support in the form of skilled employee volunteering. All funding decisions are made by panels of local people, and CG has developed programmes to train and pay people with lived experience to make decisions about where the money goes. For example, CG recently launched its Equality Fund which was designed by a panel of Camden residents with experience of inequality. CG worked with the panel of ten Camden residents over several months, providing training and development support (as well as financial compensation for their time). After this, the panel invited applications and together awarded grants to successful organisations in Camden.

CG is applying for the Strategic Development Fund to test a different model of participatory giving and engagement. It would like to use the funding to go towards three elements that will contribute to CG's sustainability: the creation of an alumni network, the development of a digital voting application and the increase of referral networks.

Through PGM, residents are in control of decision making as to which organisations should receive grant funding in Camden. CG wishes to go a step further and to form a path for ex-panellists to make decisions on CG's governance through the creation of an alumni network. This network will allow local panellists to influence decision making within the organisation on a strategic level. This idea was developed in response to panellists showing a desire to stay involved beyond the one-year grant cycle. Panellists' involvement in PGM reduces feelings of isolation and creates a feeling of belonging in their community, 100% of panellists have said that they will become more involved in their community due to their involvement in PGM. In addition to this, for panellists with lived experience of trauma, being involved in PGM can be a healing process. More than half of its current panellists are from black or ethnic minority communities. Due to the time and knowledge that individuals give to overcoming inequalities, CG funds work that meets the needs of Camden's communities. However, this labour disproportionately falls on black and ethnic minority residents and working with residents in a time limited way has the potential to become extractive. The creation of an alumni network will reduce the transactional nature of PGM. A governance structure will be developed which means Camden residents especially those from marginalised communities will make over-arching decisions on CG's grants strategy. This will increase community power and will contribute to the longer-term sustainability of PGM, allowing local people to feel listened to and will encourage them to continue their journey in participatory involvement through strategic decision making.

All panellists will be invited to join the alumni network once they have been on a panel for one year. They will come together to make strategic decisions on the future of CG on topics such as how long should the grants be for, whether CG should be focusing on social investing rather than grant making, what the role of place-based giving schemes (PBGS) in London's current climate is, what CG could be doing with regards to gang related activities that go beyond the borders of Camden and what changes can be made to CG's grants policy. The network will help to build a shared understanding of local aspirations and will demonstrate to donors that there are issues that residents consider to be a priority. It will be a space to discuss topics that come up through PGM but need a wider discussion. The board of trustees has approved delegated authority to the alumni members. The funding requested would be used initially to pilot the alumni network however the idea would be for the network to come together several times a year to discuss and vote on important topics. In addition to this, CG also wishes for the network to be co-designed by the members and this will involve coming together through the form of focus groups to create a term of reference which will outline their responsibilities. The focus is on changing the way things are done, it will be a space for creative thinking, and participants will be supported to use their personal experiences from living in Camden.

Through establishing PGM practices, CG has learnt that setting up participatory groups takes time and although relationships will have already been established, organising meetings, and ensuring all panellists have received the right information and training will require additional resources. Therefore, part of the funding will go towards employing an Alumni Manager who will work with the panellists to develop the alumni network. Responsibilities will involve providing individual support to alumni members and ensuring that they are compensated for their time. The ideal candidate for this position would be a Camden resident who has experience in community youth work and is well placed to support people individually. The Alumni Manager will also help to

set up a digital tool which will be used to carry out the voting on strategic decisions. CG will work in partnership with Meta to develop this tool which will allow alumni members to learn and vote on decisions remotely, considering that some alumni members have caring responsibilities. CG will share learnings and challenges of setting up this tool with other London Giving schemes.

Additionally, CG is requesting funding to go towards the development of referral networks to increase the representation of the following four target groups: Somali community, people with disabilities, young people and the LGBTQI+ community. The strengthened referrals with local organisations will allow CG to provide specialist support to ensure groups are representative and accessible, CG will be funding them to refer panellists in. The referral network will support people from under-represented groups to join Camden Giving's PGM panel, for example by providing one to one disability support to someone to join grant meetings. The referral network will also support citizens to apply for funding from Camden Giving for social action projects, for example by supporting a young person to apply for funding for the first time.

CG will share learning of the practicalities of implementing a participatory governance approach and what the challenges will be. Learning will be shared across the London Giving network, the PGM community of practice and CG will use this data to keep building its PGM toolkit.ⁱ There will be a focus on measuring how the alumni network supports CG's delivery plan, looking at connecting people to opportunities that increase power and how this model can be used to influence partners to change the way they are working.

City Bridge Trust is currently contributing core funding towards two leadership roles, which will enable CG to develop relationships, fundraise for Camden and begin to implement a business plan. CG's proposed work in this funding application aligns with its five-year strategy which focuses on shifting community power and increasing the amount of funding distributed in Camden. Participatory decision making through the alumni network will demonstrate to donors that CG is placing communities with lived experience at the centre of problem solving and that it is embedded in how CG functions. At the end of the three years CG will have a sustainable model of how to keep community panellists involved with the organisation, it will have strong referral pathways and a dynamic voting application which other PGM communities will be able to use. CBT funding will allow CG to do something differently and it supports the strategic aim of this scheme as people with lived experience of the issues that CG is concerned about will be the ones influencing the organisation's direction, creating a more inclusive environment for people that face barriers to be part of social change.

Financial Information

Camden Giving's income for YE 2021 was unusually high as it had had entered a multi-year partnership to deliver its 3-year HS2 Camden Fund of £3.5m and 4-year KX Fund of £860,000. Both partnerships provided a significant amount of income for the organisation, but the majority was restricted to onward funding and no further commitments were made from either donor. For YE 2022, CG faced challenges with fundraising due to the pandemic as business supporters could not commit as much as hoped and donors were giving smaller amounts, the charity ended the year with a deficit of £179,090. Income is predicted to increase for YE 2023 as CG is gradually building a mixed funding pipeline of around 30 separate supporters made up of businesses and

high net worth donors as well as multi-year commitments from funders including National Lottery Community Fund and Paul Hamlyn Foundation.

The trustees review the reserves policy on an annual basis. For YE 2021 the policy was to maintain unrestricted free reserves equivalent to nine to twelve months running costs, this equated to £263,000 - £351,000. The reason behind the high reserves policy was due to the uncertain fundraising climate following the pandemic. CG was not receiving as much funding towards its core costs, but donors wanted to contribute to restricted onward grants. The increased reserves policy ensured that CG had enough reserves to cover its core commitments to deliver the increase in onward grants. In June 2022, the trustees decided to lower the reserves target due to a more stable income stream and agreed that such a high reserves policy was no longer necessary. For YE 2023, CG is predicted to exceed its reserves policy due to securing more unrestricted income, but any surpluses will be ringfenced and used to increase grants awarded via either the Equality Fund or Future Changemakers Fund. The organisation will remain financially healthy but can ensure that surplus funds are used for furthering its objects.

Year end as at 31st March	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	2,341,024	998,912	1,211,884
Expenditure	(1,667,380)	(1,178,002)	(858,304)
Surplus/(deficit)	673,644	(179,090)	353,580
Reserves:			
Total restricted	678,418	478,161	634,943
Total unrestricted	268,181	289,348	486,146
Total reserves	946,599	767,509	1,121,089
Of which: free unrestricted	264,726	285,893	482,691
Reserves policy target	263,000	260,356	137,000
Free reserves over/(under) target	1,726	25,537	345,691

Funding History

ID	Type	Meeting Date	Decision
15877	Bridging Divides	08/07/2020	£140,000 over three years as core funding contributions towards the Director and Assistant Director posts.
14362	Strategic Initiatives	31/01/2018	£60,000 over two years towards the salary of a f/t Relationship Manager.

Recommendation

The recommended amount was reduced to discount a request for high overhead costs. CG is in a healthy position financially to be able to deliver this project on a reduced grant.

£259,300 over three years (£83,900; £86,400; £89,000) towards the f/t Alumni Manager and contribution to the alumni and referral network costs.

Appendix 2 – Barking & Dagenham Giving

MEETING 26/09/2022

Ref: 19287

ASSESSMENT CATEGORY: Bridging Divides - London's Giving: Strategic Development Fund

Barking & Dagenham Giving

Adv: Wai Chan

Base: Barking & Dagenham

Benefit: Barking & Dagenham

Amount requested: £398,277

{Revised request: £258,470}

Amount recommended: £258,500

The Applicant

Barking and Dagenham Giving (BDG) is a registered charity originally set up as a project of Barking and Dagenham Renew which was established at the end of 2015. BDG was launched in May 2020 to create opportunities for residents and organisations to work together to address the most pressing issues in the borough.

A new CEO was appointed in July 2020, whom you already fund on a part-time basis, through the Place Based Giving strand and has lead major new developments over a relatively short period of time. In December 2020, London Borough of Barking and Dagenham Cabinet announced the creation and transfer of a new Community Endowment Fund to BDG with the proceeds of the Community Infrastructure Levy. The fund, which totals c£1m in its first year, will be added to annually.

The Application

Funding is requested over three years, primarily contributing towards key community engagement and facilitation roles: the Learning and Participation Manager supported by a Project Officer; and strategic development, via an additional day towards the CEO role (your current grant is for 3 days of the CEO's time).

The proposal aims to further build on its community engagement and leadership participatory models and pilots:

- **Local participatory grant-making** – recruiting local people as decision-makers and assembling representative panels for each round of funding. BDG has made several rounds of grant distributions (totalling £250k+) including Covid/Rapid Response and 'Community Pot' grants to smaller community organisations
- **£1m community-led endowment fund**– a Community Steering Group of residents has been trained in impact investment and developed an investment policy
- **Closed Collective model** –bringing together shared issue/location organisations to collaborate and make joint funding decisions based on their knowledge of local service/needs gaps e.g., Youth Sector Network pilot

BDG has responded rapidly to local needs over the pandemic, using different participatory models, leveraging gifts-in-kind, and putting residents and community organisations at the centre of decision making. BDG also plans to innovate and scope opportunities for local mapping, data collection and platforms, and to share research

and learning. As part of its wider strategic work, BDG intends to collaborate with charities and the local authority to examine the complex debt problem and root causes of poverty within the borough. The proposal has been revised in discussion with your officer, to reflect the indicative grant level for the fund.

Funding History

ID	Type	Meeting Date	Decision
16039	Bridging Divides	26/11/2020	£248,400 over 5 years towards the salary of a CEO, together with associated running costs.

Financial Information

BDG produces consolidated group accounts incorporating the activity of the 90% owned affordable housing subsidiary Barking and Dagenham Reside Weavers LLP. The financial information provided below relates solely to the charity, BDG. Filing for the with the Charity Commission is late for 2021 and was also late in 2017 (33 days) and in 2019 (53 days). The local authority currently manages audit and Charity Commission filing, and BDG intends to take over this responsibility to mitigate late filing in the future.

Under lease arrangements, Barking and Dagenham Giving receives surplus rent of up to £250 each year per operational property in the LLP, to carry out charitable works in the local community. The annual revaluation of properties held by B&D Reside Weavers LLP has resulted in significant losses to the LLP and the group, as the costs of construction are higher than market value (determined by letting income, which is below market rate as these are social housing properties). However, 100-200 additional properties are planned to be leased over the next three years, increasing income to the charity. Free reserves are held above target and further stability for the charity is provided by the new c£900k Community Endowment Fund given to the charity by the LB B&D with the proceeds of the Community Infrastructure Levy.

Year end as at 31 March	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	270,389	1,310,054	569,677
Expenditure	(289,618)	(332,310)	(595,608)
Gains/(losses)	0	0	0
Surplus/(deficit)	(19,229)	977,744	(25,931)
Reserves:			
Total endowed	0	862,595	862,595
Total restricted	12,719	160,684	134,018
Total unrestricted	125,041	92,225	92,960
Total reserves	137,760	1,115,504	1,089,573
Of which: free unrestricted	125,041	92,225	92,960
Reserves policy target	88,000	88,000	88,000
Free reserves over/(under) target	37,041	4,225	4,960

The Recommendation

BDG has taken a pioneering approach to its community-led endowment fund and is to be commended for the way that learning and policies are publicly shared and developed by community members. This proposal is to support their pilots in community-led

investments and grants and is particularly aligned with two specific fund aims: strategic acceleration and testing different models of participatory giving.

Funding is recommended:

£258,500 over 3 years (£80,620; £106,700; £71,180) towards the strategic development of Barking and Dagenham Giving, for the costs detailed in the submitted revised budget.

Appendix 3 – Merton Voluntary Service Council

MEETING 26/09/22

Ref: 19289

ASSESSMENT CATEGORY: Bridging Divides - London's Giving: Strategic Development Fund

Merton Voluntary Service Council

Adv: Caspar Cech-Lucas

Amount requested: £399,450

Base: Merton

{Revised request: £250,127}

Benefit: Merton

Amount recommended: £250,300

The Applicant

Merton Voluntary Service Council (MVSC, aka Merton Connected) is a charitable company located in Mitcham. MVSC's mission is to promote charitable purposes in Merton, build the capacity of local third sector organisations, and promote partnership working. The applicant also hosts Healthwatch Merton and holds the social prescribing contract for Merton in all six of the borough's Primary Care Network areas. Merton Chamber of Commerce represents a service delivery partner who will drive the strategy discussed within the application. MVSC also hosts Merton Giving (MG), which launched in Autumn 2018 as a focal point for local community giving.

The Application

Through the application MVSC hopes to accelerate MG's strategic development, further integrating participatory practices, pooling resources among local organisations, and enabling local organisations to take on specific expertise (representing four of London's Giving's Strategic Development Fund Priority Areas). The applicant hopes to develop giving in the borough from different audiences, with a focus on business giving, alongside the development of participatory approaches and grant giving to result in long term sustainability.

The application aims to increase capacity to deliver outcomes across core MG areas (generating cash donations, in kind donations, and participatory grant funding). The positions applied for include a Fundraising and Engagement Manager and a Communications Officer, with other costs including recruitment and training, a contribution to customer relationship management (CRM) and web development, and a contribution to overheads. In addition, funding will be used for steering committee development, a programme review, an impact report, a local needs analysis, grant funding strategy development, and the development and implementation of a revised fundraising plan (with a focus on small and medium enterprises, large businesses, and high net-worth individuals).

The application aims to leverage local assets by further cementing MG as a thriving, sustainable, local giving model, becoming the go-to local funder in the borough. MG aims to distribute £847k through 204 grants over the three-year period of the grant benefitting over 33,000 residents and enabling over 3,000 volunteers. The target is also to raise £115k from businesses in the local area.

MG is an active member of the Giving Together collaboration (which was funded at the last Grants' Committee meeting through the Cornerstone Fund and represents a collaboration between several place-based funders). The aim is to integrate participatory practices in place-based giving schemes' grant funding to ensure that communities experiencing structural discrimination can be heard. MG will apply this learning to ensure its grant making is evidence based on community needs, moving towards a resident curated approach shaped by people who have lived experience. Corporate and individual engagement with a wide range of potential donors will encourage support via Merton Giving in a way which is both accessible and relevant. A diverse range of community organisations will benefit through skilled volunteering and in-kind donations from the business community.

The applicant originally applied with a budget of £399k, but your officer judged this would represent unsustainable growth and noted that the initial request included some ineligible costs. Through discussion with the applicant, a revised budget has been submitted that is more in keeping with the other applications submitted to the Strategic Development Fund. Your funding will act as a contribution to the overall strategic development project that the applicant has put forward in this application.

Funding History

ID	Type	Meeting Date	Decision
15384	Bridging Divides	30/10/2019	£122,000 over two further and final years towards the salaries of the Head of Development and CEO; project costs and overheads; and fees for an income-generation consultant.
15427	Bridging Divides	30/10/2019	£285,000 over 5 years towards salary costs of a Business Development Manager, running costs, marketing, communications, and overheads.
14754	Stepping Stones	06/07/2018	The applicant does not provide a persuasive case that social investment is a fundamental part of its thinking for the future, so the proposal is instead a (well presented) request for general business support which is outside scope of Stepping Stones.
14058	Stepping Stones	15/06/2017	Application rejected. The role of social investment was judged to be a distant possibility.
13043	Investing in Londoners	18/03/2016	£160,000 over three years towards the Head of Development's salary and the Chief Executive's salary, evaluation workshop costs and associated overheads.

Financial Information

The organisation has exceeded its reserve target of six months of budgeted core net operating costs in 2020/21 and 2021/22 (holding £125k against a target of £92k in 2020/21 and holding £228k against a target of £77k in 2021/22). The Trustees decided to raise the reserves target for 2021/22 to £157k so it includes core costs of strategic partner core work due to a potential funding delay from the local authority. The applicant also plans to upgrade its phone and IT systems and to provide a 5% cost-of-living salary increase for staff from 2023/24. Most of the deficit in both the 2021/22 accounts and 2022/23 accounts relates to restricted grant-giving funds rather than free reserves, due to a timing difference in grants for distribution funding being received towards the end of the previous financial year. In 2020, a local Clinical Commissioning Group ceased operating, and a £760k pot of funding was split and passed to MVSC, represented by

the restricted "Sutton and Merton CCG - MVSC 2025 fund" in the organisation's accounts. The organisation's 2023 budget shows a £383k deficit, but this a reflection of £381k of that restricted fund being used for onward grant making.

The Recommendation:

£250,300 over three years (£83,400, £81,700, £85,200) towards the strategic development of Merton Giving, specifically for the costs detailed in the submitted revised budget.

Appendix 4 – The Bridge Renewal Trust

MEETING 26/09/22

Ref: 19307

ASSESSMENT CATEGORY: Bridging Divides - London's Giving: Strategic Development Fund

The Bridge Renewal Trust

Adv: Caspar Cech-Lucas

Amount requested: £488,422
{Revised requested: £250,050}

Base: Haringey

Benefit: Haringey

Amount recommended: £250,500

The Applicant

The Bridge Renewal Trust (TBRT) is a registered charity. Established in 2009 the applicant has over a decade of experience providing front-line and specialist support services to improve the quality of life of local people. Its work focuses on health and wellbeing, supporting education and employment, and relieving and preventing poverty. TBRT is the Strategic Partner for Haringey Council and provides a range of support for the community, voluntary, and social enterprise sector. The applicant does this by helping organisations with capacity building, improving access to funding, and through collaboration. TBRT also hosts Haringey Giving (HG), established in 2019 as an independent, resident led partnership and local Place Based Giving Scheme. Haringey Giving is the aspect of TBRT that will deliver all work applied for in this application.

The Application

TBRT has applied for strategic development costs including the existing salary of the Director (replacing your Bridging Divides funding that was previously supporting it, which is now coming to an end) and contributions to several new positions including a full time Development Manager and a part time Communications Officer. The request also includes contributions to premises costs, recruitment and training, marketing and evaluation consultancy, and database development. Through this funding HG aims to show strategic development in all aspects of delivery; grant making, participatory practices, fundraising, and community benefit.

TBRT has a strong fundraising record from Trusts and Foundations, including City Bridge Trust as detailed in the table below. Overall, the fundraising target for the term of this grant is just over £1m. HG had over 1,000 donors since its inception, raising over £500k from corporates, individuals, and high net worth individuals. 93% of corporates in Haringey are small and medium enterprises and therefore represent a large part of HG's corporate strategy. The aim is to raise £600k of in-kind support from corporates over the life cycle of the grant. The strategy allows corporates to give in several ways including skilled volunteering, cash donations, and in-kind donations.

The positions applied for will enable for further citizen-led, participatory grant making to take place, particularly with communities who experience structural discrimination when seeking funding. The aim is that the applicant's grant making model becomes responsive to local community priorities and set by people who have experienced of the challenges that the grant making hopes to address. The applicant has distributed over £483k to 112 community projects through four grants programmes and has begun to develop and test participatory grant making practices that allow individuals with lived experience to have an impact on decision making. TBRT also leads the Giving Together

collaboration of place based giving schemes who aim to bring more participatory practices into their grant making that City Bridge Trust recently funded through your Cornerstone Programme. This application dovetails neatly with the funding detailed in the table below, with this Strategic Development funding allowing for the expansion and solidification of the work delivered so far by TBRT in its locality. The applicant originally applied with a budget of £488k, but your officer judged this would represent unsustainable growth and noted it included some ineligible costs. Through discussion with TBRT, a revised budget has been submitted that is more in keeping with the other applications submitted to the Strategic Development Fund. Your funding will act as a contribution to the overall strategic development project that the applicant has put forward in this application.

Funding History

ID	Type	Meeting Date	Decision
19150	Cornerstone Fund	20/06/2022	£300,000 over three years 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.
18693	Cornerstone Fund	30/09/2021	£25,000 towards the development of a collaboration of Place Based Giving Schemes to address structural discrimination in accessing funding and support using participatory methods across diverse communities in London.
17491	Bridging Divides	28/01/2021	£210,000 over three years towards the core costs of the ongoing development of Haringey Giving (HG).
14495	Strategic Initiatives	31/01/2018	£105,000 over two years towards the salary of a f/t Director for Haringey Giving, as part of the London's Giving network of place-based giving schemes.
12233	Investing in Londoners	28/01/2015	£72,900 over three years towards a food growing, cookery and family well-being programme.

Financial Information

TBRT is based in 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 £3m of this was designated against the net book value of fixed assets and programme related investments.

The applicant's reserves target is to hold six 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. Although the reserves target is not met in the table below, the charity looks 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.

Recommendation:

£250,500 over three years (£83,200, £95,000, £72,300) towards the strategic development of Haringey Giving, specifically for the costs detailed in the submitted revised budget.

Appendix 5 – Richmond Parish Lands Charity (RPLC)

MEETING 26/09/2022

Ref: 19294

ASSESSMENT CATEGORY: Bridging Divides - London's Giving: Strategic Development Fund

Richmond Parish Lands Charity (RPLC)

Adv: Jenny Field

Amount requested: £253,673

Base: Richmond

Benefit: Richmond

Amount recommended: £254,000

The Applicant

This application is made by Richmond Parish Lands Charity (RPLC) on behalf of oneRichmond (OR), a place-based giving scheme (PBGS) operating within the London Borough of Richmond. RPLC is an endowed charitable foundation that makes grants to individuals and community organisations in Richmond, with a particular focus on frail elderly people and those in need; the care of people experiencing ill-health or hardship; the provision and support of recreational and leisure activities; the promotion of education and support for individuals to access it; and any other charitable purposes for the benefit of the local community.

OR was formed as a partnership, initially between RPLC and another Richmond-based endowed charitable foundation, Hampton Fuel Allotment Fund (HFAF). It is not yet a legal entity which is why this application is made on its behalf by one of the lead partners.

The Application

OR has already established itself as an important part of the local community, and it works closely with the local voluntary and community sector, including Richmond Council for Voluntary Service. It received funding from the National Lottery Community Fund last year to provide grants to 15 community organisations working with young people affected by the Covid pandemic, working with a cross-sectoral decision-making panel which included 4 young people. It is valued by its founding partners for its engagement with those they find harder to reach. The purpose of this application is to build on this work and take it to the next level, firstly by establishing OR as an independent organisation (Charitable Incorporated Organisation) and then to develop a five-year strategic plan that will establish it as a trusted delivery partner with place-based giving firmly embedded within the borough. It should be noted that if OR becomes independent during the life of this grant, any funds from CBT would continue to be held by RPLC as a restricted fund on behalf of OR.

It is proposed to employ a full-time Strategic Lead to lead this work whose key tasks will include:

- Recruitment of a diverse trustee board that is representative of the local community.
- Building a network of funders and delivery partners with the aim of establishing OR as a vehicle for effective giving. This will include engagement with the local business community, especially though the local Business Improvement District, as well as potential individual donors.

- Work with RPLC and HFAF to transition OR to participatory models of grant-making, drawing on learning from the wider London's Giving Network.
- Identifying and communicating unmet need through peer-research and community participation.

It is also proposed to employ a part-time Project Co-ordinator to take forward the community engagement and participation agenda. The key tasks of this role will be to:

- Participate in existing community forums to raise OR's profile and gather insights into community needs which will inform OR's work.
- Build on and strengthen OR's existing networks within the local voluntary and community sector.
- Outreach to underrepresented groups and develop programme that will benefit them.
- Participate in London's Giving network meetings and other events.

Funding History

None

Background and detail of proposal

OR was established in response to independent research, commissioned by RPLC and HFAF in 2018 and undertaken by Rocket Science, into the needs of the borough. The report, *On the Edge*, found that the perception of Richmond as wealthy masks high levels of need locally. OR was established as a response to these needs.

One of the strategic aims of OR is to commission, co-ordinate and communicate peer-led research and other means of community participation in shaping the delivery of its work. For example, it recently commissioned a peer-led research project on the needs of young people in the borough, undertaken by 14 young peer researchers who interviewed 222 young people along with local charities, community groups and the public sector. The findings of this research are informing its work with young people's organisations in the borough.

Financial Information

From the audited accounts for the year end 2021, RPLC's endowment amounted to c£114,000,000 and is therefore in a financially strong position to hold this grant on behalf of OR. It currently holds funds for OR as a restricted fund which amounted to £39,994 as at June 2021. Both RPLC and HFAF are committed to sharing the future administrative costs of OR (approximately £40,000 per annum each) which means its core costs are secure as it moves towards independence and widening the range of its supporters.

Year end as at 30th June	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	3,236,542	3,262,000	3,210,000
Expenditure	(3,774,329)	(4,339,000)	(4,391,000)
Gains/(losses)	8,410,841	2,529,000	3,352,000
Surplus/(deficit)	7,873,054	1,452,000	2,171,000
Reserves:			
Total endowed	113,676,430	115,900,430	118,312,430
Total restricted	39,994	39,994	39,994
Total unrestricted	1,774,804	1,001,804	760,804
Total reserves	115,491,228	116,942,228	119,113,228
Of which: free unrestricted	1,774,804	1,001,804	760,804
Reserves policy target	1,000,000	1,000,000	1,000,000
Free reserves over/(under) target	774,804	1,804	(239,196)

The Recommendation

From its track record so far OR has demonstrated its potential to firmly embed placed-based giving within the borough. Although the borough has two established charitable foundations (its founders) the purpose of OR is to be more than a grant-maker, with its commitment to act as a catalyst for change: ensuring better use of all resources locally and by attracting new sources of funding, including from business as well as residents. It is a key characteristic of a PBGS that it can go beyond the role of a grant-maker and harness the use of all assets within a local community. Its founding funders are supporting it at least in part because it has reach into local communities that they lack. A grant, rounded up slightly, is therefore recommended.

£254,000 over 3 years (£61,000; £103,000; £90,000) towards the development of oneRichmond as an independent placed-based giving scheme.

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Committee: Grants Committee of the Bridge House Estates Board	Date: 26 September 2022
Subject: Grant Funding Activity: period ended 8 September 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 June 2022 through to 8th September 2022; the remaining 2022/2023 grants budget; grants spend to date and for this meeting by London Borough compared with the Multiple Index of Deprivation; any grant variations that have been approved under delegated authority; and seeks the Grants Committee's approval for 6 grant rejections and 11 grants over £250k.

Recommendations

It is recommended that the Grants Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity no. 1035628) and solely in the charity's best interests:

- i) Receive this report and note its contents;
- ii) Approve the grants as recommended in Appendix 3; and,
- iii) Approve the rejection of grants as listed in Appendix 4.

Main Report

Budget and Applications update

1. There have been 85 grants awarded from the main grants programmes since the last meeting of the Grants Committee bringing the net grant spend to date for this financial year to £17.3m (including associated costs and allocations, £17.7m). This leaves the remaining budget for 2022/23 (after £2m agreed in principle but not yet committed to Baobab) at £82.6m.
2. A full summary of grants committed and funds available for future commitments can be seen in **Appendix 1**. Heat maps of spending are shown in **Appendix 2**.
3. In addition to the grants listed in **Appendix 1**, 12 applications were withdrawn and 0 lapsed since the last meeting to 8th September 2022.

Recommendations to approve over £250k

4. The Grants Committee's approval is requested for 11 Bridging Divides applications of over £250k within this report. A copy of the corresponding grant assessment reports can be found at **Appendix 3**. Five additional applications of over £250k as part of London's Giving Strategic Development Fund can be found at Item 15.

Grant Rejections

5. The six applications above the level delegated to officers recommended for rejection at this meeting are listed within **Appendix 4**. In each case the "purpose" of the application is that provided by the applicant organisation. The reasons for rejection are specified following assessment against the Bridging Divides funding strategy criteria and related Policy Guidance.
6. 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.
7. A list of all rejections approved in line with the current delegated authority procedure are provided within **Appendix 5**.

Grant Variations

8. 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 6**.

Funds approved or declined under delegated authority

9. The details provided at **Appendix 7** advises the Grants Committee of funds approved under delegated authority and urgency procedures from June 2022 to 8th September 2022.

Feedback on CBT

10. 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 8**, insights from May to July 2022 have been collated, focussing on new learning as well as opportunities for improvements, with the feedback received being generally very positive overall.

Conclusion

11. This report provides details of grant funding activity since the last meeting of the Grants Committee in June 2022 and seeks the Grants Committee's approval for 6 grant rejections and 11 grants over £250k.

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: Grant recommendations to approve over £250k
- Appendix 4: Grant rejections recommended for approval
- Appendix 5: Grant rejections
- Appendix 6: Grant variations
- Appendix 7: Funds approved or declined under delegated authority or under urgency requests
- Appendix 8: CBT Feedback

Scott Nixon

Head of Managing Director's Office

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

<i>Date of this report: 06/06/2022</i>	Designated Fund - Bridging Divides, Cornerstone, Bridge Fund	Restricted funds - LCRF, TFL, RRR2	TOTAL
	£'000		
Funds balance at 1 April 2022 per draft accounts	207,967	297	208,264
<i>Already earmarked for projects</i>	(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>	(10,905)	0	(10,905)
<i>Delegated authority grants since last Cttee</i>	(6,404)	0	(6,404)
TOTAL AWARDED TO DATE OF REPORT	(17,308)	0	(17,308)
Number of grants awarded	150	0	150
Write backs, variations & revocations financial YTD	19	0	19
Number of grants revoked, varied or written back	15	0	15
Other costs incl. staff costs associated with £200m uplift	(136)	0	(136)
Conditional grants*	(178)	0	(178)
Stepping Stones loan awarded under Bridging Divides*	(50)	0	(50)
TOTAL SPENT/ALLOCATED TO DATE	(17,653)	0	(17,475)
Subtotal: available at the date of this report	189,965	297	190,440
Total grants recommended for approval 20 June 2022	(10,574)	0	(10,574)
Remaining funds available	179,392	297	179,867
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>	(17,327)	0	(17,327)
<i>Other costs and allocations</i>	(364)	0	(364)
Budget available to Committee at report date	84,629	180	84,809
Baobab funds not yet committed	(2,000)	0	(2,000)
Remaining budget available	82,629	180	82,809

*Awarded in 21/22 but remain in this report for 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. Darker colours correlate to more money.

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

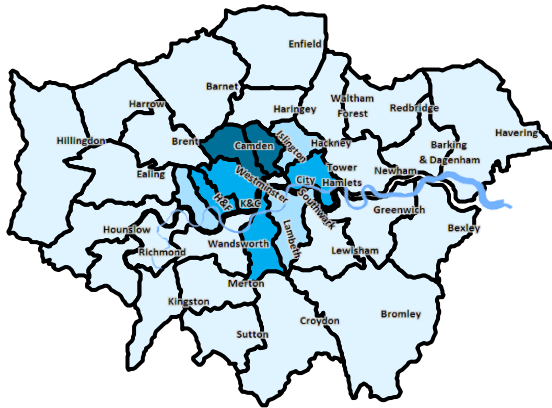


Main grants from start of Bridging Divides (September 2018) to committee date (excluding LCRF)

Main grants for this committee



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



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 recommendations to approve over £250k

MEETING 26th September 2022

Ref: 19106

ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital

London Legal Support Trust

Adv: Sandra Jones

Amount requested: £362,283

Base: City

Benefit: London-wide

Amount recommended: £362,200

The Applicant

The London Legal Support Trust (LLST), a charity established in 2003, assists voluntary sector legal advice agencies and law centres in London and the Home Counties through a range of support including grant funding. LLST is part of a network of seven Legal Support Trusts across Wales and England working to support pro bono and advice agencies in collaboration with the Access to Justice Foundation.

LLST has four core strands of work in support of free legal advice services in London. These are: raising funds to distribute as grants; working collaboratively with others to raise funds for the free legal advice sector; supporting the improved management and infrastructure of the sector through the *Centres of Excellence* programme; and helping reduce costs and save money through pro bono or discounted schemes.

LLST also convenes the London Specialist Advice Forum (part funded by City Bridge Trust) for legal advice agencies to improve knowledge sharing in the sector, as well as providing peer support.

Additionally, City Bridge Trust part funds a strategic initiative along with LLST and the Legal Education Foundation to build the capacity of legal organisations to bill the Legal Aid Agency correctly and become more sustainable.

The Application

The former CBT Committee initially supported this project in March 2014 as a Strategic Initiative, awarding £150,000 per annum over three years towards core salary and other costs for the provision of Centres of Excellence across Greater London. Funding was extended for two years under CBT's Investing in Londoners programme in September 2017. In 2019 the organisation received three years' continued support for the Centres of Excellence programme, which they were eligible to apply for under Bridging Divides criteria. LLST is now coming to the Committee for a further two years funding for this programme and is eligible to do so under CBT's funding policy which does not require fallow periods for infrastructure work.

Funding History

ID	Type	Meeting Date	Decision
19437	Strategic Initiatives	20/06/2022	£5,000,000 over five years to the London Legal Support Trust for running costs and onward grant-

			making as part of the Advice Skills Development Fund. (revised upwards to £6m by BHE Board on recommendation from the Grants Committee).
19096	Strategic Initiatives	09/03/2022	£50,000 for the year towards the costs of a full time Billing Co-ordinator and associated running costs as a partnership with LLST and Legal Education Foundation.
15328	Strategic Initiatives	25/07/2019	£345,000 over five years for a full time Development Officer plus senior officer support for the CEO and Head of Funding and associated project costs of establishing, developing, and maintaining the London Specialist Advice Forum.
15445	Bridging Divides	25/07/2019	£464,000 over three years towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
14136	Investing in Londoners	20/09/2017	£300,000 over two years towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
12218	Strategic Initiatives	13/03/2014	£450,000 over three years towards core salary and other costs to support the provision of Centres of Excellence in Greater London.

Background and detail of proposal

In 2013 LLST developed a strategy known as *Centres of Excellence* offering advice agencies support to attain 'Centre of Excellence' status. Most of the grant funding raised and distributed by LLST is directed towards those agencies having achieved this status.

The LLST Centre of Excellence project provides funding (raised separately) and free management consultancy/ training to not for profit agencies delivering legal advice services. Those agencies applying undergo a stringent 'MOT' undertaken by LLST and identify where an organisation might need to improve to attain status. Free consultancy and training support is provided throughout the process.

LLST estimates it costs, on average, £20,000 - £25,000 to turn an applicant organisation into a robust Centre of Excellence with improved strength and sustainability. Some of this comprises the cost of providing bespoke professional support and some is in the form of grant-aid to the organisation to free its capacity to fully engage in the process and/or offset staff temporarily away from front-line duties. The development process allows the organisation to plan and concentrate its efforts on improving both its services and its financial security for the future, which is often hindered by the current cycle of uncertainty and crisis management. The process also provides the opportunity for sharing best practice and developing a strategic focus across the sector in London.

Financial Information

The table below does not include the receipt of the £6,000,000 Alliance funding that was recently agreed by the BHE Board. 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 for work 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.

The organisation has anticipated that for the year ended December 2023 (which includes the first year of the £6million, they will have a very small surplus of £2,148. It expects to maintain a healthy level of free reserves.

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

The Recommendation

LLST is a specialist and unique organisation that provides expertise to build the capacity of voluntary sector legal advice agencies and is ideally placed to support organisations to become Centres of Excellence. Monitoring provided for the preceding years funded by this Committee indicates that this project has exceeded targets and going forward the organisation will be increasing the number of Centres of Excellence. Continued investment in the LLST's work will help strengthen and improve the legal advice sector across the capital and will help it better meet the increasing needs of Londoners. The amount recommended is comparable to previous funding and includes a reasonable increase for inflation each year:

£362,200 over two years (£176,100; £186,100) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.

MEETING 26 September 2022

Ref: 19273

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support

Westminster Citizens Advice Bureau

Adv: Sandra Jones

Base: Westminster

Amount requested: £316,187

Benefit: Westminster

Amount recommended: £316,200

The Applicant

Established in 1996 and a registered charity, Westminster Citizens Advice Bureau (WCAB) provides free advice services to people who live, work, or learn in Westminster. In 2020/21 it received almost 25,000 different enquiries, with the three main problem categories being benefits (51%), debt and money advice (12%), and housing and homelessness (15%). The organisation operates from one main site in Paddington, with sessions provided from four outreach sites around the borough. The organisation is a member of the Westminster Advice Partnership Service alongside Age UK Westminster, Asylum Aid and DeafPlus. The Westminster Advice Partnership Service has been contracted by Westminster City Council since 2018 to deliver advice services for local people.

The Application

Funding is sought to provide debt, money and energy efficiency advice and education through four specialist hubs in areas of multiple deprivation in Westminster. This will be achieved through the costs of 0.6FTE debt caseworker and 0.4FTE project manager/ trainer and associated running costs.

The hubs will be situated in community partners where there is most need, both because of lack of access to advice currently and based on the Index of Multiple Deprivation (IMD), evidence of fuel poverty and other areas of risk, including gambling harm. The 2021 Westminster Gambling Vulnerability Index, which considers factors including temporary or supported housing, residential addiction centres, demographics as well as IMD is a further useful source of data to identify area of needs that is used to identify hub locations. These hubs will support people facing debt and energy issues through assisting them to manage their immediate financial situation then working with them to understand and address the underlying issues they face, including those related to fuel poverty, health, employment, and gambling risk. The organisation has already identified three potential hubs and started working with community organisations to develop them.

Alongside delivering debt and energy advice WCAB will train volunteers and staff in community organisations to work with their service users who are at risk of debt and fuel poverty. Training will empower volunteers to ensure that those at risk of debt are referred for advice at an early stage, as well as supporting the volunteers to deliver awareness raising and training on relevant issues such as budgeting, understanding benefits and employment support available and energy efficiency.

Financial Information

WCAB had a net in-year deficit on unrestricted funds of £141,946 for YE 2021. This was due to an £87,264 increase in the pension deficit following revaluation. The in-

year deficit led to total unrestricted free reserves of £115k, which is below the organisation's reserves policy target.

The free unrestricted reserves are significantly below the charity's reserves policy; however, this is not considered a major risk as the organisation is moving to new premises in the current financial year. The new premises will be accessible (unlike the current space), will enable WCAB to save money on rental expenditure and offers additional space which can be sublet, meaning that unrestricted reserves can be rebuilt.

Year end as at	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	1,285,513	1,371,195	1,231,698
Expenditure	(1,336,445)	(1,330,464)	(1,287,232)
Investment & Pensions gains/losses)	(87,264)		
Surplus/(deficit)	(138,196)	40,731	(55,534)
Reserves:			
Total restricted	5,975	46,641	51,069
Total unrestricted	163,883	163,948	103,986
Total reserves	169,858	210,589	155,055
Of which: free unrestricted	115,138	143,121	83,159
Reserves policy target	300,000	300,000	300,000
Free reserves over/(under) target	(184,862)	(156,879)	(216,841)

Funding History

ID	Type	Meeting Date	Decision
12298	Investing in Londoners	28/01/2015	£107,300 over three years for 21hpw of the debt advisor, financial workshops and associated running costs.

The Recommendation

The organisation has a good track record in delivering advice services and when Westminster City Council tendered for one main organisation to provide advice in the borough, WCAB won the 5-year contract. This contract covers welfare benefits, children centres, mental health, and housing. The contract does not include debt advice. The organisation is part of 'Debt Free London', which enables it to have some funding for debt advice, but this only covers one-off support. The application to City Bridge Trust will enable WCAB to cover debt and energy casework in 4 hubs based in areas of high disadvantage, allowing the CAB to reach new clients who would not traditionally go to a CAB.

£316,200 over 5 years (£61,400; £62,600; £62,800; £64,100; £65,300) towards the costs of a 0.6 FTE debt caseworker, 0.4FTE project manager/ trainer and associated running costs.

MEETING: 21/09/22

Ref: 19304

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support/Food Poverty

The Felix Project

Adv: Clare Payne

Base: Tower Hamlets

Amount requested: £300,000

Benefit: London-wide

Amount recommended: £300,000

The Applicant

The Felix Project is a company limited by guarantee and registered charity, established in 2016. Working solely in London, it seeks to address issues of food poverty by rescuing surplus food from the food industry and redistributing it to more than 1,000 charities and schools across the capital. It currently collects or receives food from over 900 suppliers, including supermarkets, wholesalers, farms, delis, and restaurants and has four redistribution centres across the capital. Since July 2021, it has also been preparing meals from Felix's Kitchen in Poplar which are distributed to charities whose beneficiaries may not have the skills or resources to cook for themselves. Fuel poverty is a particular issue in relation to the latter.

The charity experienced a period of sustained, but gradual growth until early 2020. In anticipation of reduced income due to the pandemic, and increased demand on the charities it worked with, it mounted a public fundraising campaign in partnership with the Evening Standard in March 2020. This generated more than £10million. Such a significant increase in income presented the charity with many opportunities and since early 2020 it has opened a fourth food depot, developed a professional kitchen, expanded the number of charities it works with, and increased strategic partnerships to address food poverty in the capital. During the early months of the pandemic, it formed the London Food Alliance (LFA) with FareShare London and City Harvest and set up food distribution hubs across all London boroughs. Following ongoing discussions with FareShare London, the Felix Project has now taken over the former's London operations, which includes access to its food tracking and traceability technology system (GLADYS) and national supply partners. As a result of this, over 300 charities and community organisations who were previously paying a fee for food supply to FareShare are now receiving food via the Felix Project for free.

The charity has eleven trustees, two of whom are the founders of the charity. Board skills include finance and investing, marketing and brand development and voluntary sector experience. An active volunteer is also on the board to offer continued insight into the experiences of volunteers, of which there are over 3,500. The charity has 85 full-time and seven part-time staff, a large proportion of whom are involved in the food preparation element of its work. Currently, none of its volunteers are DBS checked as they do not have direct or unsupervised contact with beneficiaries.

The Application

The Felix Project is seeking support for the costs of a Head Chef over three years, and a contribution to the costs of meal packaging and ingredients such as herbs and spices and cooking oil, which are not received through donations. Staff costs are the

largest outgoing for the charity and packaging of food and pre-cooked meals is also expensive. The charity is doing some development into biodegradable packaging. Currently, all its packaging is recyclable. However, it cannot guarantee with any certainty that those receiving food will be recycling all the accompanying packaging. The Head Chef will be based at Felix's kitchen and have responsibilities which include developing resources and cooking videos to educate families on preparing meals with surplus food, hosting kitchen visits, and ensuring that meals prepared are culturally sensitive.

Background and detail of proposal

This is the charity's first proposal to one of City Bridge Trust's main grant programmes, though it is likely to have connections with many existing grantees through its food distribution networks. For example, it regularly distributes food to Steps2Recovery, a new grantee and charity in Hackney providing accommodation and support to ex-offenders in recovery from drug and alcohol problems.

The Felix Project's existing activities include:

- Rescuing good quality surplus food from more than 900 suppliers and redistributing this for free, to over 1,000 frontline charities and schools across London.
- Operating four redistribution depots across London.
- Delivering a Green Scheme in central London, where volunteers deliver food by walking or cycling in their lunch break or after work.
- Preparing meals from Felix's Kitchen in East London, which are distributed to charities whose beneficiaries may not have the resources or skills to cook for themselves.

Planned activities which have already been referenced in the assessment, include the development of an employability programme for young people, the progression of Felix's Kitchen as a space for community engagement, and recipes and cooking videos to educate families on preparing meals. The Head Chef will have significant involvement in all these areas. The charity anticipates that it will rescue up to 780 tonnes of good quality surplus food per year from food industry partners.

Funding History

ID	Type	Meeting Date	Decision
17183	COVID19 London Community Response Fund	08/07/2020	£10,000.00 to fund the essential and urgent costs to carry on providing support to Londoners.

Financial Information

Trustees and senior staff at the Felix Project view its fundraising success in 2020 as a one off and are focused on maintaining free reserves at a level to fund its ambitious growth target to deliver 100 million meals in 2024. It has two designated reserve funds, which are included in the total unrestricted reserve figures presented on the following page. These are split into two - the Impact Growth Fund and the

Investment Fund, which are forecast at a combined total of £4.8 million in the year ending 2021. The first will be used to fund projects that are already underway, committed, and current (for example IT projects that were initiated in 2021 and prior) to ensure that the charity has the funding available to see these through. The Investment Fund is ringfenced to support new strategic priorities including new investments in areas of work such as technology capability, innovation and infrastructure, impact monitoring and evaluation, health and safety and operational enhancements, developing the employability programme and investing in learning and skills across the charity. It should be noted that the leases on two of its four depots conclude in the next two years, and it anticipates sizeable costs relating to moving operations to new premises. Whilst the charity is spending its designated funds, significant sums are set aside for the leases if needed.

Prior to the financial year ending December 2021, the charity's free reserves target had been nine months of unrestricted expenditure. Its trustees reduced this to six months of unrestricted expenditure in 2021, which is presented in the 2021 and 2022 figures. The charity was successful in obtaining several grants from Trusts and Foundations at the height of the pandemic and continues to focus on this stream to generate income, whilst also investing in building relationships with corporates to boost unrestricted income.

Year end as at December 2020	2020	2021	2022
	Signed Accounts	Management Accounts	Budget
	£	£	£
Income & expenditure:			
Income	12,360,190	8,323,584	6,802,524
Expenditure	(3,633,108)	(6,761,064)	(9,102,911)
Surplus/(deficit)	8,727,082	1,562,520	(2,300,387)
Reserves:			
Total restricted	677,633	3,385,082	3,538,396
Total unrestricted	10,606,497	9,461,569	7,007,868
Total reserves	11,284,130	12,846,651	10,546,264
Of which: free unrestricted	4,668,316	3,893,691	3,893,691
Reserves policy target	4,149,667	2,766,445	3,994,997
Free reserves over/(under) target	518,649	1,127,246	(101,306)

The Recommendation

The Felix Project is a young organisation, which has undergone significant expansion in the last two years. The success of its public funding campaign during the pandemic was not anticipated by its staff team and board, who worked strategically to expand activities at pace to reach those in need. Substantial efforts were made by senior staff and the charity's board in developing the infrastructure and impact measurement tools to support such rapid expansion. The charity has ambitious ongoing targets for growth both in terms of reaching a greater number of charities and schools, but also in providing additional support to those receiving its food. In addition to teaching resources, it also plans to develop a mentoring and training programme for young people from low income and marginalised backgrounds to support them to become employable kitchen professionals. It will collaborate with Street League and Beyond Food Foundation on the delivery of this programme.

The request is in alignment with the Trust's policy to reduce the number of Londoners experiencing food poverty. The Felix Project has developed an extensive

infrastructure through which to distribute surplus food and is innovating to ensure it can monitor locations of increasing food poverty and match these with charities and volunteers to deliver surplus food. The development of Felix's Kitchen, with capacity to prepare 5,000 meals a day, six days a week, demonstrates the charity's keenness to innovate and expand its impact beyond purely the distribution of ingredients.

A verbal reference was obtained from a colleague at the Scheinberg Relief Fund, which provided a grant to the charity during the pandemic. This individual was extremely positive about the organisation's reach and the quality of its governance. She also highlighted its keenness to learn from others and cited that the Felix Project has been speaking to similar charities in countries including Israel and Canada to gain insight into the latest technology on food refrigeration.

It is assessed that the charity has made the necessary internal changes to manage existing growth, but also to expand and innovate in the coming years. Volunteers are central to its delivery model, and it has instigated the necessary staffing to support sustained recruitment of volunteers across London. It has invested in technology to ensure that food can be assessed and distributed as quickly as possible and is seeking to improve its ability to measure impact both on the charities receiving the food, but also on their beneficiaries directly. Funding is recommended:

£300,000 over 3 years (3 x £100,000) to cover the salary of a Head Chef at Felix's Kitchen and to contribute to the costs of meal packaging and ingredients over three years.

ASSESSMENT CATEGORY: Bridging Divides - Mental health services

AFRUCA - Safeguarding Children

Adv: Abi Sommers

Amount requested: £100,000

Base: Hackney

{Revised request: £351,490}

Benefit: Hackney

Amount recommended: £342,250

Purpose of grant request: To provide a culturally appropriate therapeutic support programme for Black and Minority Ethnic (BME) children in foster care due to domestic abuse being reunified with their birth families.

The Applicant

AFRUCA – Safeguarding Children (AFRUCA) was established as a registered charity in 2002 to advocate for African children in the UK and Africa. The charity was founded as Africans Unite Against Child Abuse – a community response to high profile deaths of newly arrived African children. Its UK operations are primarily split between London and Manchester where it works closely with social services and local authorities to safeguard BME children and ensure provision of culturally appropriate child protection services, and raise awareness of safeguarding among parents, faith leaders and communities. AFRUCA works on varied child protection matters e.g., anti-trafficking, female genital mutilation, and the branding of children as witches.

Background and detail of proposal

You awarded AFRUCA a three-year grant of £134,200 in January 2015. The funding was to develop mental health support for victims of trafficking aged 12-25, to begin their journey towards recovery. The project was successful and found culturally adapted therapy to be effective. AFRUCA reported reduced anxiety and depression among service users. AFRUCA did not apply for continuation funding at that time to review the service and reflect on learnings. It has incorporated these into its current application. AFRUCA's work with social services across London has become more entrenched since then.

AFRUCA now wishes to strengthen its support for children and families referred by social services. It is seeking funding to recruit a full-time Child/Family Therapist, accredited by the British Association for Counselling and Psychotherapy (BACP). The therapist will provide a culturally appropriate therapy service for 30 BME children a year who have been involved in the local authority child protection system because of child/domestic abuse and are being reunified with their birth parents after a period in foster care. Children will receive six sessions of integrative, person-centred therapy² incorporating aspects of play therapy to help them readjust following time away and rebuild trust, emotional bonds, and attachment with their birth parents. Parents will receive two sessions of therapeutic parental support reflecting on strengths, and goal setting and reviewing. These sessions will be held just before or

² Integrative therapy is an approach to treatment that involves selecting the techniques from different therapeutic approaches best suited to a client's particular needs. Person-centred therapy allows clients to take more of a lead in sessions where the therapist acts as a compassionate facilitator.

very soon after children return and some weeks afterwards. The therapeutic support for parents will strengthen the reunification process, reducing the likelihood of repeat abuse or a return to care. It will complement AFRUCA's existing positive parenting training for parents of children in foster care/child protection across London. AFRUCA plans to support children and families flexibly, adjusting the number of sessions to individual needs where required.

Reunification with parents is the most common route out of care in England.³ However, Black African, Caribbean, and Chinese children in foster care are less likely to be returned to their birth parents than children from other ethnicities.⁴ Moreover, successful reunification is not guaranteed. Services to support reunification vary greatly between local authorities contributing to varied outcomes.⁵ A lack of clearly defined and embedded reunification policy and protocol represents a weakness in support provision and is a nationwide problem. Children and adolescent mental health services have been identified by professionals as a specific area where there are gaps in provision in relation to reunification, for instance, in terms of thresholds for the service, waiting lists and strict eligibility criteria.⁶ AFRUCA's project is designed to address these gaps in service and provide vital support for BME family reunification. Much of the research around reunification highlights the importance of also considering the needs of parents during the process for maximum success.⁷ This need is reflected in AFRUCA's provision of therapeutic parental support to complement therapy for children returning to their families.

AFRUCA initially applied for £100,000 under CBT's transition funding offer. After discussion with a CBT Officer, it asked to be assessed under the new mental health services strand and submitted a revised project budget to support this, which is now for 5 years, hence the increase in grant amount requested. AFRUCA's proposal meets with CBT's criteria for non-statutory mental health services for people experiencing disadvantage and inequality. The funded practitioner will be BACP accredited and provide a specialist response to the multiple disadvantages experienced by looked-after BME children, who may be survivors of abuse.

AFRUCA is a community-led organisation targeting BME communities, with 75% of clients coming from Black communities. Its Board and staff team are representative of the communities served and have lived experience of the issues dealt with by the charity. AFRUCA has previously found it relatively easy to recruit representative staff and is confident it can recruit a therapist with the relevant cultural knowledge. AFRUCA has different fora for service users to engage in decision making, such as through social media and a Survivors' Group. However, these methods seem to be more appropriate for families to engage with rather than service users who are children. Prior to lockdown, AFRUCA carried out more formal consultations on its

³ Children looked after in England including adoptions: <https://explore-education-statistics.service.gov.uk/find-statistics/children-looked-after-in-england-including-adoptions/2021>

⁴ Disproportionality in Child Welfare: <https://dera.ioe.ac.uk/11152/1/DCSF-RR124.pdf>

⁵ Reunification from Out-of-Home Care: A Research Overview of Good Practice in Returning Children Home from Care: https://research-information.bris.ac.uk/ws/portalfiles/portal/174570240/web_Reunif_LitRev_12_.pdf

⁶ Improving practice in respect of children who return home from care: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/486821/improving_practice_for_children_who_return_from_care.pdf

⁷ Ibid.

services, whereas now it has more informal but continuous feedback processes. AFRUCA uses its community events, which comprise of intergenerational knowledge sharing, to help amplify the voices of children and inform its work. Prior to the pandemic, it also gathered feedback from children through its work in schools. AFRUCA is committed to its service being accessible and is considering how it can best offer a flexible service, including weekend, evening, and remote sessions.

Regarding governance, the trustee Treasurer position is currently vacant. Subject to an award being made, AFRUCA has expressed interest in accessing the City Bridge Trust's free capacity building support and signposting to external trustee recruitment platforms.

Financial Information

AFRUCA is in a stable financial position with responsive financial management. Although slightly under target of three months' expenditure, it has stable reserves which will increase from 2021/22 to 2022/23 due to the release of designated funds. AFRUCA had a significant decrease in income between 2017/18 and 2019/20 due to several large grants coming to an end without renewal. Since then, it has diversified its income sources, including growing its trading income, to mitigate against this risk in future. AFRUCA has secured 47% of income for 2022/23. A notable proportion of the unconfirmed income is from child protection training which AFRUCA has a good track record of generating. Several outstanding decisions are for continuation funding. Some unconfirmed income relates to projects which will not proceed if funding is not secured. AFRUCA has recently recruited added fundraising capacity.

Year end as at 30 June	2021	2022	2023
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	403,628	501,455	869,151
Expenditure	(347,636)	(491,244)	(785,772)
Surplus/(deficit)	55,992	10,211	83,379
Reserves:			
Total restricted	124,156	114,380	236,380
Total unrestricted	209,480	229,467	190,846
Total reserves	333,636	343,847	427,226
Of which: free unrestricted	72,325	97,148	180,646
Reserves policy target	86,909	122,811	196,443
Free reserves over/(under) target	(14,584)	(25,663)	(15,797)

Funding History

ID	Type	Meeting Date	Decision
17803	COVID19 London Community Response Fund (Wave 3)	17/09/2020	Towards the cost of delivering child protection services remotely including the cost of family support worker and family support supervisor.
12693	Investing in Londoners	23/09/2015	£134,200 over three years for the costs of a part-time Mental Health Worker/Therapist (21hpw), project costs and overheads for work benefitting young Londoners.

Recommendation

AFRUCA is a well-trusted community-led organisation with a previous positive relationship with City Bridge Trust. Its proposed work will provide vital services for children facing multiple disadvantages and fits with CBT's funding priority for mental health services. The recommendation is adjusted from the revised request to reduce high overhead costs and account for inflationary increases. Funding is recommended as follows:

£342,250 over five years (£64,500, £64,000, £68,000, £71,500, £74,250) towards a full-time BACP accredited Child/Family Therapist to provide a culturally appropriate therapy service for children being reunified with their birth parents after a period in the care system, as well as associated project and management costs. The funding is restricted for AFRUCA's London work.

MEETING: 26/09/22

Ref: 19332

ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions

Fine Cell Work

Adv: Clare Payne

Base: Wandsworth

Amount requested: £251,352

Benefit: London-wide

Amount recommended: £251,355

The Applicant

Fine Cell Work is a registered charity and company limited by guarantee. It was established in 1997 to teach needlecraft to serving prisoners and has, in the intervening years, grown in reach and activities. In addition to now working with “stitchers” in prisons, to improve readiness for release, it also delivers a post-prison support service called Open the Gates, to help participants find employment and to settle and reintegrate into the community. A previous grant from City Bridge Trust enabled the scaling up of this programme.

Those the charity works with in prisons are generally long-term male prisoners, many of whom have complex support needs. On leaving prison, stitchers are offered the chance to become apprentices at the charity’s hub in Battersea. Apprentices receive a mentor, the opportunity to undertake a textiles qualification and support with addressing practical barriers in their life such as housing or benefits issues. A key aim of the programme is to assist individuals into employment. However, mental health issues or the nature of an apprentice’s sentence may mean that they will never be able to re-engage with work. In such cases, the charity supports them to build relationships with organisations and agencies that can offer them safe opportunities to socialise and contribute as volunteers.

Some apprentices come to the charity through referrals from probation services or partner voluntary sector organisations, so will have spent time in prison but not been part of a stitcher programme. This avenue of referral has been particularly helpful in bringing women to the hub, and Fine Cell Work reports that approximately 30% of its current apprentices are female.

The charity has an engaged board and several high-profile Patrons including the author Tracey Chevalier, Esther Freud, and Dame Judy Dench. Prison volunteers, and volunteers who mentor apprentices are key in the success of its activities. Safeguarding is rigorous within the charity and Fine Cell Work places great importance on supporting boundaries to be maintained between volunteers, stitchers, mentors, and apprentices.

Stitchers and apprentices produce textile products including cushions and bags, which are sold through the charity’s website as well as via outlets such as the Tate Modern. Fine Cell Work also takes commissions and works in collaboration, one example of this being the Human Touch Project which, in 2020, involved the production of art works jointly designed by stitchers and contemporary artists including Ai Weiwei.

The Application

Fine Cell Work is applying to deliver and expand its Open the Gates service, which provides an employment and independent living offer for ex-prisoners, with an aim of helping them progress into work and crime-free lives.

The charity is seeking a contribution to the costs of its post-prison support service, which includes contribution to two staff salaries and training costs for stitchers. Open the Gates supports prisoners after release enabling them to resettle successfully into society, find employment and/or purposeful activity to live stable, independent lives. Mentoring, accredited training and bursary support all significantly reduce the risk of reoffending. The holistic nature of the service also ensures that wider issues are addressed such as low confidence, financial concerns, or housing issues all of which can affect an individual's ability to transition successfully from prison and to experience purpose and belonging in community life.

In the coming five years it aims to increase the number of ex-prisoners supported annually from 35 in 2022 to 50 from 2024 onwards. Using existing staff and volunteer mentors, the project will deliver the following support:

- Address the additional barriers faced by ex-prisoners in seeking employment, particularly following the pandemic, ensuring that they have the wider employment skills (alongside accredited textiles skills) to progress into work, and the chance to obtain funding for further training and self-employment costs.
- Provide support to ex-prisoners in the critical time just after release within a known and trusted community where they can continue to develop their textile skills while obtaining advice on housing, benefits, and other services.
- Provide ongoing training, housing, and financial advice, with emerging needs and issues picked up through regular check-ins with programmes staff alongside mentoring meetings. This will ensure participants can access the support needed before any issues escalate and become a crisis.
- Enable participants to rebuild their confidence, social skills, and networks in a safe space for transition back into independent living.

The programme is holistic and tailored to individuals. A mentor is usually assigned for 3-6 months, but in some cases ongoing support is provided for over a year. Fine Cell Work's Support Officer and Hub Supervisor will be integral in coordinating referrals to the Hub, providing practical teaching, advice and guidance to participants and ensuring that interaction with the Open the Gates programme is empowering and positive for all stitchers.

Funding History

Meeting Date	Decision
16/09/2019	£9,750 to support and develop the resilience of frontline staff.
18/03/2016	£133,000 over three years towards the running and on-costs of Fine Cell Work's Open the Gates programme supporting ex-prisoners towards employment and settled living.
20/01/2011	£98,500 over 3 years towards the salary costs of a Studio Workshop Manager at H.M.P Wandsworth helping improve social and employability skills.

Financial Information

Fine Cell Work is assessed to be in a stable financial position. It has a free reserve target of four to six months of total expenditure (the assessor has calculated the figures below using six months). Whilst these are forecast to be under target in the year ending December 2022, a comfortable buffer is still in evidence. The bulk of the charity's income comes from donations and grants which in the year ending December 2020, contributed £668,400 of income. Draft accounts for December 2021 show an increase in donations and grants income to £835,868, and income of £460,937 from the sales of textiles and products. It is forecasting a sales income of £334,823 in the year ending December 2022, which is assessed to be realistic, if not a little cautious. It is also in receipt of several multi-year grants from funders including the Henry Smith Charity, Bank of America and Charles Hayward Foundation which extend into 2024, 2023 and 2025, respectively.

Year end as at December 2020	2020	2021	2022
	Signed Accounts	Draft annual accounts	Forecast
	£	£	£
Income & expenditure:			
Income	1,130,199	1,116,433	1,271,023
Expenditure	(1,060,255)	(950,012)	(1,288,696)
Surplus/(deficit)	69,944	166,421	(17,673)
Reserves:			
Total endowed	0	0	0
Total restricted	11,810	58,035	56,466
Total unrestricted	666,295	786,491	770,387
Total reserves	678,105	844,526	826,853
Of which: free unrestricted	636,062	600,932	584,828
Reserves policy target	535,000	475,006	644,348
Free reserves over/(under) target	101,062	125,926	(59,520)

The Recommendation

Fine Cell Work is an award-winning charity, with a strong brand reputation and model of work that builds the confidence, skills and support networks of ex-offenders leaving prison. It has a good track record of stitchers moving into employment and has an open-door policy so that those requiring practical help or advice after leaving the hub can, if they need to, come back to Fine Cell Work.

The charity describes 2022 as a year of regrowth. With prison access severely restricted during the pandemic, the numbers of stitchers and apprentices it was able to work with reduced significantly. It aims to increase the number of ex-prisoners supported annually from 35 in 2022 to 50 from 2024 onwards. Engagement with these and production of needle craft merchandise is critical to the charity's social enterprise income.

The request is in alignment with the Trust's policy of funding services which support people in the transitional period after leaving prison. The Open the Gates programme and hub, provides an environment of structured support to extremely marginalised individuals as soon as their sentences end. It should be noted that Fine Cell Work has approached three other funders for the balance of the Open the Gates programme. An update will be sought on these if funding is approved. If they are successful, then further support will still need to be found in the fourth and fifth year of the grant. Funding is recommended:

£251,355 over five years (£50,270, £50,810, £50,380, £49,805, £50,090) towards the costs of the Open the Gates programme. This includes £38,491 and £46,189 (both spread over five years) towards the salaries of an Engagement and Support Officer and a Hub Supervisor, and a contribution to rent, ex-prisoner training costs and internal evaluation costs.

MEETING: 26/09/2022

Ref: 19364

ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions / Tackling Abuse, Exploitation and Hatred

Lesbian, Gay and Bisexual Anti-Violence and Policing Group

Adv: Clare Payne

Amount requested: £300,336

Base: City

Benefit: London-wide

Amount recommended: £300,350

The Applicant

Established in 1982, the Lesbian, Gay and Bisexual Anti-Violence and Policing Group, commonly known as Galop, is a charity and company and limited by guarantee. It is the capital's leading charity working with the lesbian, gay, bisexual, transgender (LGBT+) community, providing advice, support and advocacy to people who have experienced biphobia, homophobia, transphobia, sexual violence, hate crime, domestic abuse, or sexual violence. It also works with victims and survivors of honour-based abuse and so-called conversion therapies. Galop runs three national helplines and in 2020/21 had 6,426 contacts to these. The charity uses learning from its frontline work with clients to develop services, seek national policy change, and to improve statutory guidance for victims. It further bolsters this through key pieces of research around LGBT+ people's experiences of abuse and violence. 97.5% of Galop's staff and 80% of trustees are LGBT+.

The Application

Galop seeks funding to develop a new and specialist therapeutic service, which will enable it to support 524 LGBT+ people who have experienced abuse and violence, over five years. Despite its many years of advocacy and advice, the charity has never provided direct counselling to those it works with and considers this to be a gap in its own provision and across London. This proposal will enable it to fill this through the delivery of a multi-layered therapeutic service, which will include trauma counselling, safety and stabilisation counselling, weekly support groups and peer support. Led by a Head of Therapeutic Services, this service will also employ a team of freelance counsellors and trainees.

Background and detail of proposal

In 2021, Galop undertook LGBT+ domestic abuse service provision mapping, alongside Durham University. Whilst there was some counselling available in the capital, much of it was fee based or did not cater specifically for the experiences of LGBT+ survivors and victims of violence and abuse. The charity undertook further consultation with partner agencies including Women's Aid, London Friend, and the Survivor's Network, all of whom were highly supportive of the need for specialist LGBT+ counselling provision in London. Following this establishment of need, Galop went on to deliver a consultation exercise with 40 survivors to shape the model, range of services and modes of delivery such a service might encompass. The views and feedback of these individuals, along with input from the CEO of Mind Out, the mental health organisation for LGBT+ people helped Galop to develop the service design described in this proposal.

Many of those accessing this service will come through Galop’s Domestic Abuse helpline and will be experiencing multiple disadvantages. For example, threats of homicide and abduction by family members means that LGBT+ youth make up 25% of homeless youth in the UK. Galop reports that currently 70% of its clients have drug and/or alcohol issues, a high-level will be experiencing poverty and almost half are from minority ethnic communities. The service will also take referrals from partner organisations such as London Rape Crisis Centres, Survivors UK, Stonewall Housing, and the Jigsaw Partnership which supports homeless LGBT youth.

Services delivered through this programme of work will include 24 weeks of trauma counselling for clients who want to process the abuse they have experienced. Acknowledging the impact of abuse and identifying ways they can feel safe will reduce post-traumatic stress disorder (PTSD) symptoms, such as night terrors, and help clients move forward. For those not yet ready to address the abuse, trainee counsellors will provide 12 weeks of safety and stabilisation counselling, focusing on psychoeducation to provide clients with self-management techniques. Goals might be to increase feelings of control and self-empowerment and increase understanding about the impact of trauma. Both strands of counselling will be repeated with new clients over the course of the five years. Small support groups will also run from the very beginning of the programme, which will be facilitated to build client relationships and reduce isolation. Peer networks and peer support will be encouraged to develop organically.

There will not be a typical “journey” for individuals accessing this service and the provision has been designed to be flexible to participant needs and ability to discuss their experiences. For example, some individuals who are at crisis point may begin trauma counselling as soon as they enter the provision, whilst others may be part of the support groups and peer network element for some time before feeling able to enter one to one counselling. In addition to engaging directly with this provision, clients may also be referred to other Galop services to receive additional support in areas such as housing.

The Head of Therapeutic Services will be the clinical lead for this trauma-informed service and will be responsible for the line management of counsellors and trainees, assessments for clients being matched to trainees, complaints, safeguarding reviews and reporting, monitoring, and evaluation of the service. This individual will also have a small client caseload. Five-year funding is being requested as it is believed this will provide the stability to establish and evaluate this new service. Such evaluation will be used to refine provision, but Galop is also keen to share findings with relevant partners and funders to improve delivery of counselling to those from the LGBT+ community in London, and across the country.

Funding History

Meeting Date	Decision
24/10/2002	£40,600 over three years towards the development of a third-party reporting scheme combating homophobic crime in London.

25/9/2014	£150,000 over three years for the salary of a full-time specialist Case Worker and towards general running costs of the specialist service to LGBT victims of hate crime.
11/09/2020	£23,056 towards the new build of the organisation's website to meet the surge in demand experienced under COVID-19.

Financial Information

Galop has secured 90% of its forecast income for the year ending March 2023, all of which is from MOPAC grants or contracts. The charity is overly reliant on statutory funding, which it acknowledged at assessment and is actively seeking to rectify. In June 2022, it employed a designated fundraiser whose sole focus areas are to diversify the charity's incomes sources and to increase income from charitable foundations. It trialled a programme of fee-based training for external organisations in the year 2021/22, which raised £10,410. Galop believes this will generate around £80,000 in the current financial year now that social distancing restrictions are fully relaxed, which seems realistic.

Galop's free reserves policy is to hold just over £400,000 for a combination of risks including costs of winding up and continuity in the event of lost funding. Whilst the charity did not achieve this target in the years ending March 2021 or March 2022, its position is improving each year and is expected to be broadly in line with target by 2023.

Year end as at March 2021	2021	2022	2023
	Signed Accounts £	Actuals £	Budget £
Income & expenditure:			
Income	2,130,245	2,485,031	2,867,402
Expenditure	(1,858,836)	(2,146,000)	(2,823,294)
Gains/(losses)	0	0	0
Surplus/(deficit)	271,409	339,031	44,108
Reserves:			
Total endowed	0	0	0
Total restricted	332,023	582,169	582,169
Total unrestricted	289,762	378,377	422,485
Total reserves	621,785	960,546	1,004,654
Of which: free unrestricted	262,550	351,165	395,273
Reserves policy target	407,085	407,085	407,085
Free reserves over/(under) target	(144,535)	(55,920)	(11,812)

The Recommendation

Galop is assessed to hold the trust of the LGBT+ community in London and to be a charity heavily influenced by user experience. It has strong relationships with the police, with other LGBT+ charities, with local authorities in London and with central government. It has undergone rapid expansion of its frontline advocacy and advice since early 2020 with a doubling of its staff team. This is partly due to a desire to respond to an unprecedented rise in demand for support over the pandemic, but also to the arrival of a new CEO in early 2020, who had the fundraising experience to catalyse such a response.

This application is to develop a specialist trauma-informed counselling service for LGBT+ people in London who have experienced violence and abuse. Some of the latter will have experienced abuse years ago but felt unable to report it to the police or to other services, whilst others may have suffered hate crime during the pandemic for example and be dealing with the ongoing mental health implications of that. The service will offer flexibility in the point of engagement and support participants to identify and work towards their own desired outcomes.

The request is in alignment with the Trust's policy of funding services which assist survivors of abuse. Those accessing therapeutic support through this service will experience improved mental health and confidence to engage with other services and agencies. The peer support element will also reduce isolation and create networks of wider support which can be sustained outside of Galop's involvement in years to come. Critically, services will be delivered by LGBT+ counsellors, whose lived experience will be commensurate with the client's identity.

£300,350 over five years (£56,570, £58,270, £60,020, £61,820, £63,670) towards the salary and oncosts of a full-time Head of Therapeutic Services, and a contribution to overheads.

The balance of the project costs, which includes freelance counsellors' fees, will be met by a grant from the London Mayor's Office for Policing and Crime (MOPAC).

MEETING: 26/09/2022

Ref: 19472

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support

Haringey Law Centre

Adv: Clare Payne

Amount requested: £405,643.00

Base: Haringey

Benefit: Haringey

Amount recommended: £292,785

The Applicant

Haringey Law Centre (HLC) was established in 1975 and is a charity and company limited by guarantee. It operates from a base in Bruce Grove in Tottenham, where its team of solicitors, caseworkers, barristers, and trainees (four full-time and nine part-time staff in total) deliver free professional legal advice, support, and representation to vulnerable people with urgent needs and difficult issues. The majority of those it supports are from Haringey (67%), but it also has clients from Enfield, Hackney, Camden, and Islington boroughs.

In the months prior to the pandemic, the charity was experiencing an increase in demand for its services. This continued over the course of lockdown and is still growing as individuals struggle to repay loans, face eviction and/or undergo benefit reassessment as they transition to Universal Credit. Despite this rise HLC continues to conduct outreach in the local community to ensure those who are hardest to reach are aware of its services. Clients are very diverse (180 languages are spoken in Haringey) and many have a combination of issues which require resolution.

The charity has six board members, 90% of whom are former service users. One of its board members is also a paid administrator for the organisation, which was approved by the Charity Commission and is warranted in the charity's governing document. This is an unusual arrangement, but one which HLC is comfortable with and keen to maintain.

The charity is a member of the Law Centre Network and a founder member of Haringey Claimant Justice Campaign, a group of organisations working together to raise the profile of a benefits system which is damaging the lives of claimants in Haringey. HLC is well connected within the local voluntary sector and regularly works with Haringey Citizens Advice Bureau and St Mungos. It also regularly engages with Haringey GP Surgeries and local Housing Associations.

The Application

HLC requests funding to establish an Emergency Legal Action team to deal with increasing numbers of urgent legal cases clients are presenting with, post Covid. Existing members of staff will allocate a proportion of their time to the new team which will prioritise clients requiring prompt legal action in areas such as eviction, benefit sanctions or excessive debt. Clients often come to HLC as last-minute emergencies, and the charity must concentrate their immediate needs and delay work on other important cases. A designated team comprising five part-time Senior Caseworkers (supervised by a member of the Senior Legal team) will reduce the impact of such cases on existing clients and enable HLC to be more effective and

pro-active and to deliver quicker response times for clients. The Emergency Legal Action team will also work with other staff members to increase awareness of its services and reach vulnerable individuals with no knowledge of HLC. The charity anticipates that 800 clients will be referred to the Emergency Legal Action team in the first year of the service, increasing to 1,050 new urgent and ongoing clients being dealt with in the third year.

Like many Law Centres, HLC has suffered financially in the last ten years because of cuts to legal aid and government changes to the Legal Aid Sentencing and Punishment of Offenders Act (LASPO). Haringey Council also reduced the size of its grant contributions to the Centre due to wider budget cuts. In the last six years the charity has been managing the fall out of these combined reductions in contract and grant income, which has affected its free reserve levels and staff capacity. It has remained largely focused on delivering services but has, in the last two years, developed several new relationships with grant funders such as Trust for London and the National Lottery Community Fund, which have boosted capacity and the charity's ability to think more strategically about its future. It is assessed that such relationships have also increased the charity's confidence to approach more Foundations. This proposal is also evidence of the Centre's desire to work more smartly with clients, and the creation of a designated legal team for emergency inquiries should ensure smoother and more manageable caseloads for staff members.

Funding History

ID	Type	Meeting Date	Decision
17319	COVID19 London Community Response Fund	08/07/2020	£16,250 towards three months of costs.

Background and detail of proposal

Debt incurred over the course of the pandemic, combined with, for many clients, the transition to Universal Credit, has resulted in increasing client numbers with urgent legal cases turning to HLC for support at a point of crisis. Additional issues such as a change in immigration status or threat of eviction result in clients who are overwhelmed, distressed and in need of urgent legal advice and support. HLC reports that many people struggle to admit that they are not coping - and are often in denial when they first come to the charity. Many also do not trust statutory services and it can take time to get the truth of their situations. The creation of an Emergency Legal Action team comprising five part-time Senior Caseworkers (supervised by a member of the Senior Legal team) will reduce the impact of such cases on existing clients and enable HLC to be more efficient and effective in achieving outcomes.

HLC's anticipates that over three years, legal interventions implemented by the Emergency Legal Action team will mean that 1,800 people threatened with eviction, homelessness; loss of benefits; deportation; crippling debt; or loss of employment rights will have had their and their family's lives averted from crisis. Over three years, HLC will deliver the following:

- Establish an Emergency Legal Action team, which will prioritise working with emergency clients, and assembling additional support from other HLC

services as required. The latter might include signposting to voluntary sector partners.

- The promotion of the new Emergency Legal Action team through the distribution of leaflets and delivery of HLC open days and street stall events. It will also work closely with community partners and Haringey Council to create referrals and to track, where possible, the journey of a client who has achieved a positive outcome.
- The issuing of over 2,000 monitoring/feedback questionnaires to clients accessing the Emergency Legal Action team, the responses from which will be collated and used to improve the service.

Clients receiving support with ongoing legal matters and a successful outcome will experience improved conditions in their own life and that of their family, increased self-esteem, and improved mental health and wellbeing. Complex legal problems which seemed insurmountable will be unpicked and hopefully solved by the HLC Legal Emergency Action team, moving clients from a position of surviving to one in which they can begin to cope and move towards a position of personal and financial stability and safety. The HLC views the Emergency Legal Action team project as a key element in its ongoing activities and will give consideration for its funding beyond the period of this grant in its Business Plan and Funding Strategy for 2025 onwards.

Financial Information

The Centre's free reserves are under its target of six months of total expenditure and need to be improved as a priority. Although its draft final business plan has not been reviewed as part of this assessment (it was not available in time), the financial review below indicates that it is moving towards meeting its target.

HLC has raised 21% of its anticipated income for the year ending March 2023. It has a funding application in with the Legal Empowerment Fund for £75,000 and is currently working up proposals to Access to Justice with which it has an existing relationship, and to the Henry Smith Charity, with which it does not. HLC receives an annual grant of £50,000 from Haringey Council, already secured for 2022/23, and is in discussions with Enfield Council regarding a similar level of support as 20% of its current clients come from the borough. The charity has forecast £30,000 of unrestricted income (currently unconfirmed) which relates to legal aid agreements, half of which are either awaiting payment or in the process of being submitted for billing by the charity. It has also forecast £70,000 of unrestricted income (currently unconfirmed) which relates to legal services. Half of the cases aligned to this forecast amount are already up and running and the HLC has an 85% success rate, so this figure is assessed to be realistic.

Year end as at March 2021	2021	2022	2023
	Signed Accounts	Actual	Budget
	£	£	£
Income & expenditure:			
Income	361,458	300,618	488,387
Expenditure	(319,965)	(217,350)	(357,500)
Surplus/(deficit)	41,493	83,268	130,887
Reserves:			
Total restricted	60,917	100,042	158,042
Total unrestricted	35,857	79,990	152,877
Total reserves	96,774	180,032	310,919
Of which: free unrestricted	29,168	73,301	146,188
Reserves policy target	159,983	108,675	178,750
Free reserves over/(under) target	(130,815)	(35,374)	(32,562)

Recommendation

This request is in alignment with the Trust's policy of funding services which provide advice and support to disadvantaged individuals who are experiencing challenges relating to debt, benefit issues, employment problems, housing, or immigration status. Many of the Centre's clients have multiple issues and will be under extreme stress. The provision of legal advice and representation is critical in enabling these individuals to reach a point of emotional and financial stability from which to move forward in their lives. HLC is strongly embedded in its community and three of its board members are former service users.

HLC is assessed to have an exceptional understanding of the needs of its clients and commitment to improving their lives. Staff are regularly working beyond paid hours to ensure those at crisis point obtain critical legal advice, and the charity is committed to working with others to improve the policy environment for clients.

HLC's free reserves are significantly under its target of six months of total expenditure. However, this target is higher than many charities of a similar size. The Centre is in the process of writing a business plan, which it reports has a section on building free reserves. The document was live at the time of the assessment and will be shared with the Trust on completion.

It is assessed that the charity could benefit from some support in building confidence, networks, and promotional material to raise income through individual or corporate donations, as its focus is largely on Trusts and Foundations at the current time. The fact that the charity has a board member who is also its paid administrator is highly unusual, but within Charity Commission guidelines. If this grant is approved, then HLC may benefit, in the longer term, from some guidance in examining how trustees are kept up to date on relevant information. The administrator/trustee dual role is favoured by the Centre as this individual can explain and share detailed information. It may be that trustees are being over briefed, or that some additional staff capacity is needed so that its Centre Director, who is also the Senior Solicitor can fulfil this role.

The applicant was asked to reduce the amount requested as the combined part-time positions totalled more than one full time post. Overheads have been calculated at 28% as the combined Emergency Legal Action team staff salaries will amount to a 28% share of the charity's total annual staffing costs. This is assessed to be reasonable. Funding is advised as follows:

£292,785 over three years (£88,885, £97,325, £106,575) towards the staffing and running costs of the Haringey Law Centre Emergency Legal Action Team. This includes the funding of five part-time positions (Senior Case Worker, Housing – 1 day a week per year, Senior Case Worker, Welfare and Benefits – 1 day a week per year, Senior Case Worker, Immigration – 1 day a week per year, Senior Case Worker, Debt – 0.5 days a week per year, Senior Case Worker, Employment – 1 day a week per year) and Senior Legal supervision time.

MEETING: 26 September 2022

Ref: 19084

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support/Food poverty

The Vineyard Community Centre
Amount requested: £105,593
{Revised request: £263,559}

Adv: Sandra Jones
Base: Richmond
Benefit: Richmond

Amount recommended: £263,600

The Applicant

Vineyard Community Centre (VCC) is a registered charity established in 2011 by Vineyard Life Church to meet the needs of those in crisis and who are socially excluded. This is achieved through the Community Centre and Richmond Foodbank which are in the basement of The Vineyard Life Church. VCC also operates four satellite foodbanks located across the Borough in Barnes, Isleworth, Whitton, and Hampton, taking referrals from a range of other agencies, and providing food parcels for people in need and unable to make in person visits. Other Centre activities include a drop-in service for homeless people and those in crisis, weekday mornings providing hot meals and showers, a community nursing project, and a comprehensive range of support with housing, benefits, and employment. Each afternoon, the Centre hosts a Community Café with subsidised meals. The Centre is well networked in Richmond and is recognised by the local authority as the organisation responsible for running foodbanks.

The Application

Funding is sought towards the cost of a full-time Foodbank Manager and associated running costs for a five-year period. This post is currently part-time and is funded through a range of small grants and donations. With an increase in demand (since January 2022 a 20% increase, and then in March a further 26%) as well as operating five foodbank sites, the organisation decided that the current part-time post should become full-time with an increased salary.

The funding will enable the current part-time post to become full-time with a wider brief than the previous incumbent. The post includes all operational issues of running foodbanks and parcel deliveries including staff and volunteer recruitment and supervision, organising referral pathways, liaise and refer people to the casework team, provide training, representing VCC in external meetings and liaising with partner organisations, expanding its network of referral agencies and improving collaborative work around food poverty in the borough.

Financial Information

Income for 2021 was £810,885 which included a substantial gift of £129,659 received from a charity in Ham which ceased to operate and nominated VCC to have its remaining funds. The figure also includes in-kind food donations valued at £130,899 for that year only and is not included in the 2022 and 2023 forecasts. During 2022 there was an 8-month period where the organisation was without a CEO and Corporate Fundraiser, which meant that little was achieved around income generation. Both posts have now been filled and it is anticipated income from fundraising will increase slightly in 2023 but get back at pre-Covid fundraising figures from 2024.

Funding History

ID	Type	Meeting Date	Decision
14580	Investing in Londoners	06/07/2018	The job descriptions included a requirement connected with the promotion of religion, thus being restrictive and were therefore ineligible for funding.
14579	Eco Audits	20/05/2019	Application withdrawn on the advice of a CBT officer
13361	Investing in Londoners	14/0/2016	The job descriptions included a requirement connected with the promotion of religion, thus being restrictive and were therefore ineligible for funding.

The Recommendation

The initial application was for three years for the post only, however in discussion with the organisation's newly appointed CEO, VCC amended the request to have a salary increase to make it in line with similar posts within the Foodbank sector as well as a contribution to core costs. The organisation also increased the request to five-year funding which is permitted in line with CBT's funding policy. VCC applied for funding in 2018 and 2016 and were declined both times because the posts it applied for included the promotion of their faith. The organisation has revised its job descriptions and no longer include this element and is now eligible for funding.

The organisation has made a good case to make this post full-time, and funding from City Bridge Trust would enable to organisation to expand its Foodbank services at a time when demand is increasing. The increase in salary is reasonable and in line with similar posts, and therefore recommended.

£263,600 over five years (£48,100; £49,600 £51,100; £55,200; £59,600) towards the costs of a full-time Foodbank Manager and associated costs.

ASSESSMENT CATEGORY: Bridging Divides - Connecting the Capital

Partnership for Young London

Adv: Kate Halahan

Amount requested: £368,824

Base: City of London

Benefit: London-wide

Amount recommended: £369,000

Purpose of grant request: To build dynamic partnerships across the youth sector, develop the skills and competencies of the youth workforce and ensure that young people's voices influence policy and practice across London.

The Applicant

Partnership for Young London (PYL) is a charitable company. Established in 1997 it is London's Regional Youth Unit, working to support the youth sector to improve outcomes for young Londoners. It is hosted by the City of London Corporation and a Member of the Court of Common Council sits on its board (but was not involved in this funding application). The charity provides information, networking and brokering opportunities, consultancy, research, professional development, and policy and practice updates. It collaborates with London Youth, the Greater London Authority, London Councils, Local Authorities and housing, health, and faith and belief sectors. It also has networks with 2,500 cross-sector youth sector leads.

The Application

PYL requests five years funding under CBT's infrastructure programme to support its work in both capacity building, voice, representation, and advocacy. The request includes a contribution towards salaries (0.5 FTE of existing full-time Strategic Director post and 0.5 FTE of existing full-time Workforce Lead post), costs for external trainers, communications and monitoring, and a contribution towards running costs. Funding will enable PYL to deliver three key outcomes, in line with its 2021-22 manifesto:

- Build dynamic partnerships across the youth sector which are responsive to the emerging needs of young Londoners. This will involve facilitating 25 network sessions with over 250 cross-sector youth sector groups, improving cross-regional collaboration, establishing wider partnerships, and sharing resources. This will include the expansion of the Young Londoners Coalition, the London Policy Network (300 members) and the Universities and Youth Sector Research Network (35 members), influencing policy and practice to improve outcomes for young Londoners.
- Develop a cohesive cross-sector workforce that has the skills and competencies to address the holistic needs of diverse young Londoners, benefiting 2,000 youth sector organisations. Capacity building will include practice networks and facilitating over 40 training sessions with youth sector leads, with a particular focus on small groups and staff from minoritized communities. It will focus on key thematic areas such as social justice, trauma informed practice and targeted work. Work will also include collaboration with

partners to develop a cross-sector workforce strategy, ensuring that services adapt to the needs of young Londoners.

- Work with diverse groups of young Londoners to advocate and amplify their needs and ideas, influencing policy, practice, and future resourcing. Over 300 young people will engage in regional decision-making processes, create robust pathways into decision making, build leadership skills and co-produce future priorities. It will trial new approaches and link to various areas of work, increasing young people's voice and influence over the five years.

City Bridge Trust funding will resource core staffing to make sure that the organisation is robust, able to facilitate networks, extend its strategic influence and capacity, and secure resourcing for new collaborations in partnership with its stakeholders. The work will build in a particular focus on diversity, inclusion, and social justice, engaging diverse groups of young Londoners, and youth leads from minoritized communities. It will also develop early intervention approaches around areas such as planning future workforce needs, securing a pipeline of new leaders from diverse communities, as well as a pan-London offer for young people focused on early help.

Background and detail of proposal

As a leading infrastructure support organisation for young people's services, you have funded PYL over several years but all for different purposes, as shown in the 'Funding History' table below. All grants have been well-delivered and reported on, including a five-year Investing in Londoners grant to support youth sector organisations to improve monitoring, evaluation, and impact reporting. With that grant ending in August 2020, this request is eligible under CBT's re-application policy. PYL holds an Anchor Programme – Resourcing Grant which is due to end on 25th May 2023. As this is from one of the Trust's special one-off programmes, PYL would be eligible to hold a Bridging Divides grant at the same time.

PYL takes a systems-based approach, working with a wide range of stakeholders. Partnership and collaboration are at the core of its work, to avoid duplication and ensure a more effective joined up approach. For example, PYL has a partnership with London Youth (another youth sector infrastructure charity funded by City Bridge Trust) to ensure both organisations align work offers to achieve maximum impact and avoid duplication. For instance, London Youth provides training on core topics like safeguarding and governance and PYL provides more specialist training topics, like trauma and social justice, or for different partners like hospitals. PYL also established the Young Londoners Coalition with London Youth, a network of cross-sector youth organisations, with the Greater London Authority and London Councils, collaborating on policy and practice. This proposal to CBT builds on work already underway via the Coalition, such as creating a cross-sector workforce strategy and cultural competency framework, ensuring that services adapt to the need of young Londoners.

Financial Information

Most of PYL's income is derived from Trusts and Foundations. PYL generated earned income from membership fees but suspended this at the onset of the coronavirus pandemic to ensure accessibility to all. The charity's 2020/21 accounts

show a large surplus of £182,368 but £133,565 of this was restricted funds. The charity's 2022/23 budget shows a large deficit but £283,859 of this was restricted funds which are covered by restricted reserves. The budget is also only based on secured income, so there is still time in the year to raise additional funds, such as this application. PYL was established in 1997 with an expendable endowment from the former London and Southeast Regional Advisory Council for Further Education. This was worth £118,093 on 31 March 2022, of which £98,593 was held in the City of London Charities Pool (charity reg no. 1021138). The table below shows that the charity is below its reserves policy to hold the equivalent of 3 months operation and wind-up costs. However, the endowment fund is available to mitigate this risk. Overall, the organisation is in a healthy financial position.

Funding History

ID	Type	Meeting Date	Decision
193 89	Anchor Programme - Resourcing Grant	20/06/2022	£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.
188 31	Strategic Initiatives	30/09/2021	£26,500 over one year for the salary costs of PYL staff engaging with the Pan London COVID19 Response and Recovery work.
161 57	COVID19 Small Charity Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £13,375, equivalent to one regular quarterly payment for the organisation's current grant. COVID19
153 93	Anniversary infrastructure support programme	09/05/2019	£138,000 over two years towards a project designed to improve how young people's lived experience can shape and influence data collection and research thereby improving services that affect them.
151 99	Strategic Initiatives	31/01/2019	£180,000 over three years to deliver a programme of specialist support to organisations in receipt of Young Londoners Fund grants.
148 31	Anniversary infrastructure support programme	07/09/2018	£18,500 towards a pilot of different approaches to how young people can use research methods and data to bring about systems change.
145 74	Investing in Londoners	06/07/2018	£106,000 over two further and final years for the costs of the Development Lead; admin support; and associated running costs.
143 65	Anniversary infrastructure support programme	14/03/2018	£23,100 towards PYL's core costs to enable its continued active involvement with The Way Ahead.
139 49	Anniversary infrastructure support programme	11/05/2017	£48,500 towards the cost of the Strategic Director's salary and a part-time intern and associated project costs.
125 48	Investing in Londoners	12/03/2015	£ 142,000 over three years for a part-time Development Lead, related admin support, associated running costs, and the costs of events and training sessions.

The Recommendation

PYL continues to provide quality services, London-wide, to organisations working with young people. The funding will provide capacity and dedicated staff resource time to support these functions, facilitating and brokering links across various partners; supporting young people to share their views and needs; and working with

key groups of staff and young people to offer support and resources. The work builds on the structures that have been developed to date and will provide essential resource and time to extend the work in line with the demands that the charity is experiencing. Funding is recommended as follows:

£369,000 over five years (£68,000; £70,900; £73,720; £76,740; £79,640) towards salary costs of Strategic Director and Workforce Lead and other related costs to sustain and develop infrastructure work to support young peoples' services across London.

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support

Central England Law Centre

Adv: Gilly Green

Amount requested: £476,747

Base: Outside London

Benefit: London-wide

Amount recommended: £476,750

Purpose of grant request:

The funding is towards salary and project costs of Kids in Need of Defence UK (KINDUK) – a collaboration between Central England Law Centre, four not-for profit specialist legal advice agencies (hubs) and over 25 law firms to train and supervise commercial lawyers, who in turn provide pro-bono representation in children's immigration cases.

The Applicant

Central England Law Centre (CELC) is a charitable company set up in 2001 which provides specialist legal advice and casework in Welfare Benefits, Housing, Community Care, Immigration, Asylum, and family and public law to around 6,000 people across the West Midlands each year. As well as providing direct services, CELC aims to bring change to the systems in which it operates. Flagship programmes over the last several years have included a five-year partnership programme exploring how to redesign public services in Coventry to build resilience and take earlier action, a project to tackle economic justice for women, and a legal education programme for users of social care services.

The Covid-19 pandemic has had a disproportionate effect on CELC's service users with more people being forced into hardship resulting in a significant increase in demand for the centre's services. CELC has been agile in its response - finding new ways of working; developing new collaborations and innovating in key areas. The charity employs 67 staff, of whom 45 are engaged in the direct provision of services. There is a board of trustees with diverse skills who have carefully overseen the retirement of the long serving CEO and transition to her Deputy after an external recruitment drive. CELC holds a Specialist Quality Mark in each of the areas of law in which it offers advice and representation. CELC is the lead organisation for Kids in Need of Defence UK (KINDUK) which is the subject of this application. Although a national initiative, the application relates solely to beneficiaries in London.

Background and detail of proposal

Research by the London Mayor's Office in 2020 indicates that approximately 107,000 undocumented children live in London. Many live in severe poverty, and often in families where adults have status but, due to complex immigration rules, children do not. With the right legal support many of these situations can be resolved, but without funding, and the lack of legal aid, most have little access to specialist support. Within the US, Microsoft's support of KIND US has enabled the creation of a global website which families can visit anonymously to check their children's immigration status. A link from this to the KINDUK website connects those in the UK needing help with CELC who, where appropriate, refer to one of the four participating advice agencies, nearest to where the children live. Each advice agency

employs several supervising solicitors who oversee the scheme in each hub and pair the young person and their family with a pro-bono commercial lawyer to take on their case. CELC has recruited over 650 pro-bono lawyers, provided help to 1,100 individuals, currently has over 300 open cases, and 415 children have gained citizenship or long-term residency with a 99% success rate on completed cases. There is a current waiting list of 200 and CELC is seeking funding to employ another supervising solicitor to work with Coram Children's Legal Centre and Islington Law Centre, the two specialist London agencies. The new post holder will work with up to 4 new commercial law firms who will be trained and supported to provide pro-bono capacity to take on immigration cases for children. It is expected that an additional 75 children will gain citizenship each year.

In this instance, the new postholder will be employed by CELC rather than by one of two London hubs (as is the arrangement for six of the current seven supervising solicitors). This is in part a response to the difficulties in recruiting experienced immigration solicitors which has become harder since 2013 when much immigration work was taken out of the scope of legal aid. CELC already employs one supervising solicitor, based in Scotland who is paired with 4 London law firms. CBT officers understand this arrangement to work well - the work is largely remote (even before the pandemic) with some limited travel to London. As the pro bono lawyers are London-based, clients can still be offered in-person appointments when it is needed. CELC's role is one of referral management, co-ordination, systems development fundraising and evaluation. Supervising solicitors' meet in quarterly operational group meetings and train together. They also work collaboratively to produce training materials and update documentation for pro bono lawyers. The University of Warwick is working with a group of parents whose children have been supported to capture their experiences and testimonies. CELC currently receives around 500 referrals per year, (50% from London) many word-of-mouth and through referring organisations but expects this to rise to 1000 per year by 2025. In the last year, 21 London organisations have made referrals.

The annual budget for KINDUK is £838,369 with an inflation increase year-on-year for the 5-year duration of the project. 75% of funds are already secured or 'highly likely' for the first 3 years. An initiative to raise £10,000 annual contribution from each of the 26 pro-bono law firms is underway. The request to the Trust represents just under 11% of the annual budget.

The initiative also involves policy influencing work to ensure local authorities are recognising children's immigration needs and supporting those needs at an earlier stage. It is currently piloting work with Birmingham Children's Trust and the aim is to roll out the work in other local authorities, including in London, using learning from the pilot. It also works with the Refugee and Migrant Children's Consortium – led by Coram Children's Legal Centre – to feed into policy influencing at a national level.

Financial Information

CELC's income derives mainly from Coventry City Council, Trusts and Foundations and earned income from the Legal Aid Agency. The City Council has been a consistent and supportive funder for many years. Grants received from emergency Covid -19 funding helped to offset the loss in Legal Aid originally budgeted in 2020/21. The drop in income in the current year is due to the floating-off of a charity

CELC has been incubating. All budgeted income is confirmed for the current year ending March 2023.

CELC's reserves policy is to hold general funds within a range of £0.8m-£1m. The charity was below this target in 2021 due to its pension deficit of £817k which is reflected in the calculation of free reserves below. However, the charity had set up a designated fund of £600k to mitigate the risk of pension crystallisation (not included in the calculation of free reserves) and this offsets the shortfall, bringing free reserves in line with target. The draft accounts for 2022 show a reduction in the pension liability to £488k. This is included in 2022 free reserves and assumed to remain at the same level of 2023, so that free reserves remain below target. The designated fund for pension risk was released in the year because Coventry City Council has agreed to provide a pension guarantee to provide for any shortfall in the event of crystallisation. This gives assurances over the pension deficit and, when considering the organisation's flexibility to use its free reserves excluding the deficit, means it is well within target. Designated funds remain high but include a property acquisition fund, and development plans which will see the funds likely spent within two years. CELC has strong governance and financial oversight and overall, the organisation is in reasonably good financial health.

Funding History

The organisation has not previously been funded by the Trust and so a reference has been sought from Unbound Philanthropy – a long term funder of KINDUK. Unfortunately, the relevant individual is on holiday until 7th September 2022, but a verbal update will be available at the meeting.

Recommendation

The issue of children's immigration status is crucially important, with risks of deportation, lack of security, mental health distress and family heartache. CELC's track record in pioneering approaches is well established. It can demonstrate that the model is effective with an impressive success rate. It is a sizeable grant request, but KINDUK (and therefore CELC) is one of the very few programmes which provides specialist legal support and can increase access to justice for undocumented children. Its strengths are in its partnerships and considerable pro-bono support. Officers confirm that all beneficiaries will be within the Greater London area and recommends a five-year grant as follows:

£476,750 over five years (£91,795, £93,540, £95,314, £97,126, £98,975) to support the costs of a supervising solicitor and associated costs for the KIND UK initiative helping undocumented children receive settled status. The grant is restricted solely for the benefit of Londoners.

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support**Thames Reach Charity****Adv: Lily Brandhorst****Base: Southwark****Amount requested: £259,406.00****Benefit: Lewisham****Revised request: £256,653****Amount recommended: £256,700****The Applicant**

Thames Reach Charity (TRC) is a charitable company that supports homeless and formerly homeless people, as well as others who require assistance to sustain themselves in accommodation and improve their quality of life. It works across London. Its services fall into two main categories. Intervention services, such as street outreach, hostels, and drop-in advice, are geared towards assisting people to move and remain off the street. Prevention services, including tenancy support, health initiatives and a range of employment, training and education schemes, help people to sustain accommodation and develop new skills, avoiding a downward spiral of homelessness characterised by moves into poorer and less stable accommodation. TRC helps many people facing complex issues which often relate to homelessness, by providing specialist and person-centred support, for example, specialist supported housing for people with substance misuse and mental health problems. Collaboration is a cornerstone of TRC's approach, seeking to address unmet needs through innovative partnerships. Among others, it works with other voluntary sector organisations, the NHS, the emergency services, and local communities.

The Application

Thames Reach seeks funding to deliver homelessness prevention advice and support in community settings in Lewisham. TRC's Advice Quality Standard-accredited Deptford Reach service provides an advice and support hub primarily for rough sleepers. During the Covid-19 pandemic, in response to changing needs and circumstances, and the hub's temporary closure, TRC began to offer advice services based in Lewisham food banks. These services target a wider range of people, including those experiencing hidden homelessness and those at an increased risk of becoming homeless. By working out of food banks, the service has become more available to people who might not otherwise access support with issues including housing, employment, and immigration. When people access the service, a support worker will help them work through what kinds of support they want and need. The support worker will then help them to access a range of services, either internal to TRC, such as training and employment programmes, or through external referrals: for example, in the case of immigration advice, TRC will refer people on to trusted specialist partners. By supporting people to concurrently address multiple problems that could place them at risk of homelessness, the pilot service takes a personalised and preventative approach.

In addition to existing delivery in food banks, the service will work with a wider group of community partners and settings, including places of worship and children's centres. By engaging people in these settings, they remain within their comfort zone,

and advice workers can have conversations to understand their individual needs, such as debt management, job insecurity and tenancy issues. City Bridge Trust funding will pay for a full-time Lead Worker, to further develop this community-based offer over the next five years. The Lead Worker will work with a Support Worker funded by TRC.

Background and detail of proposal

Founded in 1984 to support people rough sleeping in London, TRC has four decades' experience of developing services to address and prevent homelessness. 22% of staff have been homeless themselves. In 2018, TRC merged with Deptford Reach (DR), a charity that has worked in the Lewisham community for over 40 years. The merged charity has continued to run DR's advice and support services, as well as its rough-sleepers support hub, which provides support and respite for people experiencing homelessness, including showers, laundry, GP visits and drug and alcohol support workers. In 2022 TRC's Deptford Reach service was awarded joint first prize in the London Homelessness Awards for its high quality caseworking and innovative community services. It holds the Advice Quality Standard.

With the onset of the Covid-19 pandemic in early 2020, the building from which the hub operates had to close. In response to changing needs and circumstances, TRC began to offer advice services based in food banks, which proved more accessible many people who commonly face barriers and stigma in attending a day centre setting, including women and migrants. Through this pilot, TRC been able to expand its reach to more people who are insecurely housed and experiencing hidden homelessness, requiring advice and support around housing issues, immigration, debt management, and employment issues. The community-based service addresses an important gap in provision. The 2017 Homelessness Reduction Act has helped to a degree in making support available to people at risk of homelessness through local authorities. However, the nature of support provided varies across different local authorities and is often subject to rules that make it difficult to access. Even where availability of support is better, people still have take the step of going to the council for help – an action that is fraught with barriers for many: whether due to stigma, mistrust of statutory bodies, or uncertainty about entitlement to support. By moving into community settings, TRC has been able to help people who understandably do not want to be defined as homeless or “at risk”, and who face barriers as described. It is keen to expand this reach further by working with a wider range of community partners.

Financial Information

Free reserves have fallen below the organisation's target level of 10% of annual income. The charity's Trustees believe that it is sufficiently well positioned despite this, because the charity is liquid, has strong cash flow, and has the option to sell some of its properties if needed. It is also worth noting that some of the organisation's unrestricted spend in 2022 and 2023 comes from designated funds, rather than the general reserve. In 2021, 80% of the charity's income came from statutory sources: this is spread across nine different local authorities and multiple other agencies including the Greater London Authority, which mitigates this risk. In 2020 and 2021 the charity saw a dip in grants income due to the Covid-19 pandemic. In line with its 2022 – 2025 Business Plan, it has invested in growing fundraising capacity and expects this to bear fruit from 2023/24 onwards via increased income,

both from grants and, in particular community sources, which represent a valuable source of unrestricted income.

Year end as at 31st March	2021	2022	2023
	Signed Accounts	Draft Accounts	Forecast
	£	£	£
Income & expenditure:			
Income	20,393,857	22,158,832	22,153,438
Expenditure	(20,957,459)	(22,196,442)	(22,365,608)
Surplus/(deficit)	(563,602)	(37,610)	(212,170)
Reserves:			
Total restricted	6,519,120	6,505,663	6,464,776
Total unrestricted	9,578,154	9,554,001	9,382,718
Total reserves	16,097,274	16,059,664	15,847,494
Of which: free unrestricted	689,551	665,398	494,115
Reserves policy target	2,039,386	2,215,883	2,215,344
Free reserves over/(under) target	(1,349,835)	(1,550,485)	(1,721,229)

Funding History

ID	Type	Meeting Date	Decision
14331	Investing in Londoners	14/03/2018	£31,000 for one year towards the salary and on-costs of the full-time Crisis Intervention Advice Worker.
13613	Stepping Stones	24/11/2016	PURPOSE OF GRANT: £47,000 over 12 months towards the salary of a full time Development Manager and on costs in order to test Thames Reach's Homelessness Prevention Programme.
12930	Investing in Londoners	24/05/2016	£90,000 over three years towards the costs of Thames Reach's Mental Health Matters project delivering support to entrenched rough sleepers with undiagnosed mental ill-health.

The Recommendation

Thames Reach Charity has a strong track record of delivering advice and support to people who are homeless or at risk of homelessness. It has developed a range of innovative services that support people to sustain accommodation and move forward positively with their lives. At assessment the CBT officer was impressed with the culture of respect for service users at TRC, focussed on creating a space, through case working and specialist support, for people to define and address their own needs. A grant is recommended:

£256,700 over five years (£26,950; £56,000; £56,850; £57,900; £59,000) for the salary of a Lead Worker and associated project costs, to further develop the community-based advice and support offer in Lewisham

Appendix 4: 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>							
June 2022	19510	Critical Support C.I.C	To increase our capacity to re-distribute surplus food and other aid to a growing number of charities and local community groups	The application is for a sum significantly higher than half of the organisation's turnover and for work which does not fall squarely within the organisation's objects.	£460,000	Caspar Cech-Lucas	Wandsworth
April 2022	19358	Feeding Britain	The Food Bus is a converted double-decker bus providing fresh, culturally-appropriate, affordable food with wraparound support and social opportunities to people in highly deprived areas.	The application is for costs that fall outside CBT's funding programme criteria and cannot be supported. These include a community bus providing affordable and nutritious food as well as onward grants to a local partner.	£308,160	Gilly Green	Westminster
<i>Total Advice and Support (2 items)</i>					£768,160		
<u>Positive Transitions</u>							
June 2022	19563	Petget Debt Collectors and Consultancy	We want to provide material, social, emotional and educational support to prisoners, refugees, migrants, orphans, young girls, aged and the vulnerable children.	There is no record of the company name, number, or director on the Companies House register.	£3,020,000	Tim Wilson	Westminster
March 2022	19311	Ultimate Counselling C.I.C	To tackle barriers faced by 825 asylum seekers, refugees and immigrants living in East London through provision of specialist mental health and community outreach support.	The organisation has not sufficiently demonstrated that it has the capacity to deliver the proposed programme. There is an additional risk around the organisation's over-reliance on City Bridge Trust's funding if a grant was awarded.	£263,874	Gerard Darby	Barking & Dagenham
<i>Total Positive Transitions (2 items)</i>					£3,283,874		

Request Date	Ref	Organisation	Purpose	Reason for Recommendation for Rejection	Amount Requested	Funding Manager	Area
<u>London's Giving</u>							
<u>London's Giving</u>							
March 2022	19281	The Kensington and Chelsea Foundation	We are requesting a grant to increase our skills and efficiency in awareness raising, fundraising and participative grant-making, which will in turn enable us to have greater impact in our community.	After applying a fair and consistent approach across applications received for London's Giving grants, this application cannot be recommended for funding. Given that the applicant currently holds two City Bridge Trust grants, it did not demonstrate sufficient additionality to complement CBT's existing support towards its community engagement work and development and piloting of participatory grants work.	£260,700	Anneka Singh	Kensington & Chelsea
March 2022	19293	Young Barnet Foundation	The funding will underpin a partnership approach to grant giving and further grow our local giving, strengthening a community approach to meeting the needs of our residents - safer, stronger, more connected Borough.	More work needs to be done on partnership arrangements so this application is judged to be unsuitable for this funding programme.	£271,920	Jenny Field	Barnet
<i>Total London's Giving (2 items)</i>					£532,620		
Grand Totals (6 items)					£4,584,654		

Appendix 5: Grant rejections

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

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19194	Account3	Eco Audits	20/06/2022	N/A	Lydia Parr	The organisation is a company limited by guarantee and therefore not eligible for funding from City Bridge Trust.
19454	AFRICAN EQUALITY FOUNDATION LIMITED	Bridging Divides	10/08/2022	£14,600	Veronica Pearce	The organisation is not eligible for City Bridge Trust funding because of its constitutional form.
19222	All Inclusive Advice and Training	Bridging Divides	26/09/2022	£200,000	Tim Wilson	The organisation's legal form means that it is ineligible for funding under CBT's current policy.
19275	Central YMCA	Transition Funding - Bridging Divides	11/07/2022	£91,000	Gerard Darby	The organisation has not sufficiently justified a need for the project and its proposed method of delivery.
19209	Chinese National Healthy Living Centre	Transition Funding - Bridging Divides	31/05/2022	£56,832	Lorna Chung	Despite the merits of the project, the organisation would need to be in a stronger financial position before a grant could be recommended.
19126	Community Network Group CIC	Transition Funding - Bridging Divides	11/07/2022	£30,840	Caspar Cech-Lucas	Based on information provided officers have not been assured that the organisation's financial position is sufficiently robust. Accounts for 2020/21 show negative free reserves.
19723	Connect: North Korea	Eco Audits	26/09/2022	N/A	Lydia Parr	Organisation building has less than 2 years remaining on lease therefore is ineligible.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19120	Croydon Drop In	Bridging Divides	26/09/2022	£216,356	Julia Mirkin	Only a proportion of the organisation's service meets CBT's funding priorities for advice funding and the case for expanding the service is based on a relatively modest level of caseload expansion. There are three other advice agencies in Croydon and CDI has a strong reserves position.
19262	Dialogue Society	Bridging Divides	11/07/2022	£89,554	Anneka Singh	This proposal is recommended for rejection as it does not meet CBT's current funding priorities.
19326	Dream Believe Achieve (DBA) CIC	Transition Funding - Bridging Divides	24/05/2022	£30,000	Abi Sommers	The application proposes to deliver general wellbeing activities and does not specifically reference how work will target those with mental health needs or provide specialist support. As such this does not meet the criteria of CBT's policy when funding specialist support services for children and young people. The applicant also holds over one year's annual expenditure in reserves, making funding less of a priority at this time.
19083	Family Lives	Bridging Divides	26/09/2022	£229,905	Julia Mirkin	Although there is some crossover with CBT's support for refugees, asylum seekers and migrants under CBT's Positive Transitions funding programme, the emphasis of this proposal is on supporting improved parenting skills and family relationships, which is not a close fit with CBT's focus on increased independence and empowerment of individuals.
19312	Friendship Society	Transition Funding - Bridging Divides	24/05/2022	£88,496	Anneka Singh	This is recommended for rejection as it does not sufficiently meet CBT's priorities.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19285	The Gifted Organisation Limited	Transition Funding - Bridging Divides	04/08/2022	£100,000	Aasha Farah	Officers have recommended this application for rejection as the proposed work does not fit with CBT's programme priorities. AF 27.07.22
19309	Gurseva	Small Grants - Bridging Divides	26/09/2022	£22,720	Lorna Chung	Based on the financial information provided by the applicant officers have not been assured that the organisation's finances and governance are sufficiently robust yet.
19351	HELLO BEAUTIFUL FOUNDATION	Transition Funding - Bridging Divides	06/07/2022	£44,000	Clara Espinosa	This application does not sufficiently fit CBT's current criteria under this strand as the project's target audience appears to be broader than older people.
19214	HUMEN	Transition Funding - Bridging Divides	11/07/2022	£95,748	Caspar Cech-Lucas	The project applied for does not aim to work with a sufficiently significant proportion of eligible beneficiaries, and is therefore outside of the priorities of CBT's grants programme.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19336	Intercultural Roots for Public Health	Transition Funding - Bridging Divides	26/09/2022	£33,150	Julia Mirkin	An application from a young organisation that exists to connect arts practitioners who use holistic movement techniques to broaden physical awareness. The applicant proposes to deliver a physical activity programme, largely online, to older people in Hackney, Islington and Camden. The application does not demonstrate a track record of delivering physical activities specifically to older people and the application does not explain how activities might be tailored for this user group to ensure accessibility and safety: online classes are proposed to be two-hours long and the application contains very little detail about risk or initial participants' assessments. The application also proposes to work face-to-face with older participants with mental ill-health, which is beyond the focus of CBT's funding for older people. The proposed age-range of potential participants, which extends to people who are 45-years of age, is broader than CBT's criteria for the older people's programme.
19333	Khulisa	Transition Funding - Bridging Divides	26/09/2022	£100,000	Anneka Singh	This application is recommended for rejection as it does not meet CBT's priorities. It focuses on short-term intervention for increased health and wellbeing, rather than specialist mental health provision.
19439	The Kids Network	Transition Funding - Bridging Divides	10/08/2022	£90,000	Abi Sommers	The application proposes to deliver mentoring and general wellbeing activities for children with general risk factors rather than specialist support services for children and young people with mental health needs. As such this does not meet CBT's criteria sufficiently well.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19156	KidsOut	Transition Funding - Bridging Divides	06/07/2022	£69,000	Lily Brandhorst	This application, which is to distribute laptops, cinema tickets and treats to children in women's refuges, cannot be classified as a specialist support service and does not therefore meet the Trust's priorities.
19235	Kongolese Centre for Information & Advice	Bridging Divides	24/05/2022	£89,400	Hannan Ali	Based on the financial information provided by the applicant, officers have not been assured that the organisation's management of its finances is sufficiently robust.
19428	Life Changers Foundation	Small Grants - Bridging Divides	26/09/2022	£46,660	Anneka Singh	This proposal does not meet CBT's current priorities under the Small Grants programme.
19093	Lighthouse - supporting women through stormy times	Bridging Divides	26/09/2022	£125,000	Lily Brandhorst	The application seeks funding for more than half the organisation's total income, which is against CBT's policy. In addition, the application lacks key details on project delivery and it is not clear whether all women and children supported through the project would be survivors of abuse and as such may not sufficiently address the Trust's priorities.
19413	LMK - Let Me Know	Transition Funding - Bridging Divides	10/08/2022	£87,625	Clara Espinosa	The application does not sufficiently meet the funding priorities of the Positive Transitions (transition funding) strand and the organisation's most recently signed accounts show negative free reserves.
19225	London HV Chaplaincy	Bridging Divides	11/07/2022	£20,000	Matthew Robinson	The proposal does not sufficiently meet the Trust's current funding priorities.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19211	Merton Voluntary Association for the Blind	Transition Funding - Bridging Divides	06/07/2022	£80,000	Julia Mirkin	The applicant delivers a comprehensive range of activities, which are broader than the focus of CBT's disability strand of Bridging Divides. This is problematic, given that the applicant has requested core funding. The applicant's activity programme is not a strong example of the social model of disability, which is a cornerstone of CBT's disability funding. The organisation has considerable holdings in designated and general funds and is in a strong position to self-fund.
19140	National Deaf Children's Society	Transition Funding - Bridging Divides	06/07/2022	£61,775	Lily Brandhorst	This is a large and well-funded charity, contrasting with many smaller organisations led by d/Deaf people, which struggle to secure funding. At the end of March 2021 the organisation reported free reserves of £16m, far in excess of its maximum target of £9.6m. This work could be funded from those reserves.
19394	Providence Row Housing Association	Bridging Divides	04/08/2022	£96,652	Abi Sommers	The application proposes to deliver peer support and wellbeing activities rather than trauma-informed therapeutic interventions/services. As such this does not meet CBT's criteria for improving the accessibility and range of mental health support and services for people who are at risk of homelessness or vulnerably housed.
19408	The Reasons Why Foundation	Transition Funding - Bridging Divides	04/08/2022	£94,800	Anneka Singh	This application is recommended for rejection as stronger governance controls would need to be in place before a City Bridge Trust grant could be awarded.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19356	RISE Mutual CIC	Transition Funding - Bridging Divides	11/07/2022	£98,242	Caspar Cech-Lucas	The applicant's organisation type is not eligible for CBT's grants programmes. Therefore this application is recommended for rejection
19475	Roller Station CIC	Transition Funding - Bridging Divides	10/08/2022	£98,010	Anneka Singh	This application is recommended for rejection as the funding request significantly exceeds 50% of the organisations income. In addition, the proposed activity does not meet CBT's current funding priorities.
19246	The Sapphire Community Group	Transition Funding - Bridging Divides	11/07/2022	£100,000	Lorna Chung	The application does not sufficiently meet the Trust's funding priorities.
19201	SHiFT Organisation	Bridging Divides	31/05/2022	£100,000	Matthew Robinson	Funding is not recommended because the proposal risks duplicating statutory responsibilities and funding already in place.
19355	St Barnabas Church, Downham	Bridging Divides	22/06/2022	£3,168	Lydia Parr	The application requests an access audit for a Church building that is directed at the benefit of its congregation and not of direct benefit to the wider community. As such this does not meet the criteria of CBT's policy when funding community spaces.
19271	St Margaret the Queen (Hub) PCC	Bridging Divides	31/05/2022	£50,000	Clara Espinosa	The applicant provides space for community activities but does not demonstrate evidence of delivering capacity building support to frontline charities, social enterprises or community groups. As such the application does not meet the criteria of the Trust's infrastructure funding strand.
19266	St Sepulchre without Newgate	Transition Funding - Bridging Divides	26/09/2022	£129,300	Anneka Singh	This proposal is recommended for rejection as it does not meet CBT's priorities.

Ref	Organisation	Type	Date Declined	Requested Amount	Funding Manager	Declination Comments
19520	TKO BARKING AMATEUR BOXING CLUB CIC	Small Grants - Bridging Divides	26/09/2022	£33,000	Abi Sommers	Based on the financial information provided by the applicant, officers have not been assured that the organisation's management of its finances is sufficiently robust. Accounts for 2020/21 show negative current assets and reserves.
19268	United Kingdom Thalassaemia Society	London's Giving	24/05/2022	£75,000	Matthew Robinson	The applicant is not a place-based organisation and the proposal's key outcome is to raise awareness of the health condition, Thalassaemia. As such the application does not meet the priorities of CBT's Place Based Giving Scheme strategic development funding strand.
18898	Universal Ease To Redress	Small Grants - Bridging Divides	20/06/2022	£46,500	Lydia Parr	The organisation does not have sufficient track record of delivery in this area.
19516	Woolwich Creative District Trust	Eco Audits	22/06/2022	N/A	Lydia Parr	The applicant has sufficient reserves that self-funding is possible.
Grand Totals (40 items)				£3,037,333		

Appendix 6: Grant variations

1. OrganicLea CiC (grant ref 18887)

On 30/09/2021 a grant of £5,000 was awarded to OrganicLea CIC. As per CBT's Access Audit Programme guidelines, this amount was awarded pre-emptively, with the actual amount paid on return of invoice of completed work. OrganicLea CIC has now returned this invoice and are therefore ready to be paid the accurate amount for the Access Audit that was completed.

Recommendation

That a sum of £475 out of the grant of £5,000 to OrganicLea CIC be revoked.

2. Richmond Carers Centre (grant ref 14323)

On 02/05/2018 a grant of £2,400 was awarded to Richmond Carers Centre for the purpose of an eco-audit and the associated costs. After all activities have taken place a balance of £400 remains, therefore a revocation of the remainder is recommended.

Recommendation

That a sum of £400 out of the grant of £2,400 to Richmond Carers Centre be revoked

3. The Parochial Church Council of the ecclesiastical parish of St James and St John with St Peter, Clerkenwell (grant ref 15705)

On 26/03/2020 a grant of £4,500 was awarded to The Parochial Church Council of the ecclesiastical parish of St James and St John with St Peter, Clerkenwell to provide access audit and consultancy reports. The final invoice from the access consultants totalled £3720 so the balance of £780 is not needed.

Recommendation

That a sum of £780 out of the grant of £4,500 to The Parochial Church Council of the ecclesiastical parish of St James and St John with St Peter, Clerkenwell be revoked.

4. Pushkin House Trust (grant ref 14971)

On 31/01/2019 a grant of £2,000 was awarded to Pushkin House Trust 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.

Recommendation

That a sum of £200 out of the grant of £2,000 to Pushkin House Trust be revoked.

5. Mevlana Rumi Mosque (grant ref 14358)

On 14/03/2018 a grant of £2,200 was awarded to Mevlana Rumi Mosque for the purpose of an eco-audit and the associated costs. After all activities have taken

place a balance of £400 remains, therefore a revocation of the remainder is recommended.

Recommendation

That a sum of £400 out of the grant of £2,200 to Mevlana Rumi Mosque be revoked.

6. YMCA George Williams College (grant ref 15304)

On 21/03/2019 a grant of £60,000 was awarded to the Centre for Youth Impact to deliver evaluation-related capacity building services. CYI had previously taken the intellectual property of the Project Oracle Evidence Hub (which CBT also supported) to improve standards of evidence used by organisations working with children and young people. CYI's grant was to support training sessions on theory of change, evaluation planning and data analysis with twenty youth organisations, and to support a further 20 organisations to achieve Project Oracle validation.

CYI reported difficulties reaching its target numbers from early in the grant, and the ensuing COVID-19 lockdowns further reduced its capacity to deliver. Whilst CBT agreed various operational adjustments with CYI, work was put on hold pending the organisation's merger with YMCA George Williams College. In late 2021 CYI reported an underspend of £4,754 on funds received, and in July 2022 notified CBT that it was unable to use this money.

There also is an unscheduled balance of £5,541 on the original award so this variation report relates to a total of £10,295 of the grant.

Recommendations

That a sum of £5,541 out of the grant of £60,000 to YMCA George Williams College be revoked. That a further sum of £4,754 out of the grant of £60,000 to YMCA George Williams College be written back

7. Holy Trinity English Classes (grant ref 16941)

On 30/09/2021 a grant of £1,719 was awarded to Holy Trinity English Classes (HTEC) as a Bridging Divides grant. The project was to enable ESOL classes to continue by closing the gap between subsidised fee income and salaries for posts where qualified volunteers were available. HTEC for the last several years, have recruited Certificate in Teaching English to Speakers of Other Languages (CELTA) qualified ESOL teachers as the organisation has not been able to recruit suitable qualified volunteers to deliver the classes.

The high Covid-19 rates in Harrow affected the opening of the classes and as a result the attendance was very low. The situation was further complicated by the delayed recruitment of a permanent vicar for the church which impacted the strategic direction of the classes.

Following discussions with the organisation, Officers agreed that the ESOL classes would be delayed until September 2022. However, the organisation has notified City Bridge Trust that they are no longer in the position to re-open HTEC at that time due to both CELTA qualified ESOL teachers not being available at that time. The number

of anticipated students attending the sessions drastically reduced from 25 students to 2 at the time of this revocation.

Recommendation

That the full grant sum of £1,719 out of the award made to Holy Trinity English Classes be revoked.

8. Pleasance Theatres Trust (grant ref 15749)

On 30/01/2020 a grant of £2,400 was awarded to Pleasance Theatres Trust Ltd. The auditor incorrectly budgeted for the report writing element of the proposal therefore an increase of £200 is required to cover the full cost of the eco-audit.

Recommendation

That the grant to Pleasance Theatres Trust Ltd be increased by £200 to £2,600 to cover the full cost of the eco-audit.

9. Park Theatre (grant ref 15013)

On 21/03/2019 a grant of £2,600 was awarded to Park Theatre to provide an Eco Audit. £2,000 was paid to the Eco Auditor and the balance of £600 was not needed.

Recommendation

That a sum of £600 out of the grant of £2,600 to Park Theatre be revoked.

10. St John the Evangelist Church, Kingston (grant ref 14281)

On 31/01/2018 a grant of £2,600 was awarded to St John the Evangelist Church, Kingston to provide an Eco Audit. £1,800 was paid to the Eco Audit and the balance of £800 was not needed.

Recommendation

That a sum of £800 out of the grant of £2,600 to St John the Evangelist Church, Kingston be revoked.

11. St. Peter's Bethnal Green (grant ref 13295)

On 22/09/2016 a grant of £87,620.00 was awarded to St. Peter's Bethnal Green towards the cost for access improvements to the Grade II listed church in Tower Hamlets. The grant ended on 26/04/2021 and the organisation was due to receive a final payment of £2,078 on 10/05/2022. Due to an error, the organisation received a duplicate payment of £2,078 on 25/05/2022 which will need to be refunded to City Bridge Trust.

Recommendation

That a sum of £2,078 of the grant of £87,620.00 to St Peter's Bethnal Green is written back.

12. The London Irish Centre (grant ref 15985)

On 25/03/2021 a grant of £4,120.00 was awarded to The London Irish Centre towards access consultancy. The access audit consultancy costs totalled £3862 so the balance of £258 is not needed.

Recommendation

That a sum of £258 out of the grant of £4,120.00 to The London Irish Centre be revoked.

Appendix 7: Funds approved or declined under delegated authority or under urgency (6th June 2022 to 8th September)

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

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19253	Active Horizons	16/08/2022	£97,600 over two years (£47,000, £50,600) to combat racism in Bexley schools and communities through raising the voice and leadership of young people.	Hannan Ali	£97,600
19232	Afghanistan and Central Asian Association	14/07/2022	£97,200 over two further and final years (£48,900; £48,300) towards the Afghanistan and Central Asian Association's work with Afghan asylum seekers to support their integration and mental health.	Catherine Hobbs	£97,200
19481	Age UK Waltham Forest	24/06/2022	£2,600 (6.5 days) to provide an eco-audit.	Lydia Parr	£2,600
19530	American International Church	23/08/2022	£2,400 (6 days) to provide an eco-audit.	Lydia Parr	£2,400
17717	Ark Resettlement Services	21/07/2022	£187,200 over three years (£62,500; £62,030; £62,670), for the salary and on-costs of a full time Resettlement Co-ordinator and related costs of delivering a programme of resettlement support to ex-offenders in Enfield and Haringey.	Lily Brandhorst	£187,200
19239	Aspire	21/07/2022	£128,000 over 5 years (£25,360, £24,390, £25,960, £25,350, £26,940) to cover the London costs, including staffing, training, and telephone, of Aspire's Welfare and Benefits Advice Service. The recommendation includes a contribution of £3,635, which is 50% of the total costs of gaining a recognised Quality Advice Standard.	Catherine Hobbs	£128,000
19241	Association for Cultural Advancement Through Visual Art (ACAVA)	22/08/2022	£4,200 to cover the costs of an independent Access Audit for the Blechynden Street site.	Lorna Chung	£4,200

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19283	Barnet Citizens Advice Bureau	03/08/2022	£250,000 over five years (£43,500, £46,725, £50,500, £53,225, £56,050) towards a 0.6FTE OISC level 3 immigration caseworker and a 0.4FTE immigration caseworker to be trained to OISC level 3, as well as project costs and overheads. Both caseworkers are funded to provide advice in Barnet.	Abi Sommers	£250,000
19136	Blackfriars Settlement	16/08/2022	£48,300 over two years (£24,190; £24,110) to double the capacity of Blackfriars Settlement's befriending service for isolated older people, to respond to high and increasing levels of need in north Southwark.	Aasha Farah	£48,300
19367	Books Beyond Words CIO	07/09/2022	£50,000 over two years (£25,000 x2) to support the Book Club Coordinator to create 30 book clubs for people with communication difficulties across the boroughs of Camden, Islington, Haringey, Ealing, Greenwich, and Lewisham.	Hannan Ali	£50,000
19261	The Brandon Centre	02/08/2022	£100,000 over two years (£50,000; £50,000) towards a new Clinical Psychologist post (28 hpw), plus associated overheads, to deliver psychotherapy for LGBTQ+ young people aged 16-25 in Camden and Islington.	Kate Halahan	£100,000
19221	Breaking Barriers	21/07/2022	£123,000 over three years (£40,000, £41,000, £42,000) to meet growing demands for information, advice, and guidance support and of increase engagement in educational courses for refugees in London.	Hannan Ali	£123,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19449	Camden Volunteer Bureau	06/09/2022	£161,360 over three years (£49,760; £52,800; £58,800) to strategically develop health volunteering across North Central London and embed volunteering in the strategic plans of the NHS.	Lydia Parr	£161,360
19483	Carers UK	14/07/2022	£3,400 (8.5 days) to provide an eco-audit.	Lydia Parr	£3,400
19045	Clinks	10/06/2022	£142,500 over 3 years (£50,000; £46,000; £46,500) towards establishing the Good Prison Initiative within HMP Isis	Nat Jordan	£142,500
19391	Communities Welfare Network	12/08/2022	£15,410 over two years (£7,515; £7,895) to deliver support services for local ethnic minoritized older people aged 65-80 years who are isolated or ill.	Aasha Farah	£15,410
19074	Connect: North Korea	02/08/2022	£50,000 over two years (£26,000; £24,000) for operational core costs underpinning specialist services supporting the North Korean community living and working in London.	Wai Chan	£50,000
19216	Copleston Centre	02/08/2022	£119,000 over two further and final years (£58,000; £61,000) for a Programme and Volunteer Coordinator 0.6 fte and Administrator 0.4 fte, and associated costs of delivering the Silver Linings programme of activities. Draw down of funds in the second year of the grant is conditional on the organisation meeting the filing deadline for its Charity Commission return due on 31 October 2022.	Matthew Robinson	£119,000
19076	Deaf-SELF	20/07/2022	£48,550 over three years (£15,400; £16,170; £16,980) towards the activity and running costs of the summer play scheme	Lily Brandhorst	£48,550

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19131	Disability Advice and Support Hillingdon	17/08/2022	£75,000 for two further and final years (£37,000; £38,000) for the full-time salary of the Transition Worker; travel costs and project oncosts of £3K per year.	Julia Mirkin	£75,000
19459	Dr Johnson's House Trust Ltd	14/07/2022	£1,800 (4.5 days) to provide an eco-audit.	Lydia Parr	£1,800
19447	Embracing Arts	03/08/2022	£21,000 over three years (£6,000; £7,000; £8,000) towards the costs of delivering the Christmas for Kids programme in London Funding to help meet the costs of Embracing Arts delivering its live performance and digital programme, Christmas for Kids, over three years (2022-4) in Greater London. The programme targets children and young people who otherwise would not be able to see and enjoy theatre because of illness and/or life limiting conditions.	Gerard Darby	£21,000
19176	Enfield CAB	22/07/2022	£221,000 over five years (£40,000, £42,000, £44,000, £46,400, £48,600) towards the salary of a Welfare Benefits and Debt Adviser (28 hpw)	Nat Jordan	£221,000
19359	FAT MACY'S	19/07/2022	£50,000 over two years (£25,000; £25,000) for the costs of delivering therapeutic support to the organisation's beneficiaries and a contribution to core costs.	Matthew Robinson	£50,000
19243	Football Journeys	06/07/2022	£40,000 over two years (£20,000; £20,000) to contribute to salaries and project costs associated with the Ambassador Programme to support marginalised young Londoners and develop future leaders.	Lydia Parr	£40,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19684	Freshwater Foundation	23/08/2022	£33,000 over one year to Freshwater Foundation towards its grant-making activities and capacity building work with a proportionate sum covering on costs.	Anneka Singh	£33,000
19374	Global Generation	18/07/2022	£83,640 over two years (£41,490; £42,150) towards 3 days p/w Story Garden Manager, 2 days p/w Community Manager, project materials and related organisational overheads.	Anneka Singh	£83,640
19360	Good Vibrations	12/07/2022	£24,500 over 2 years (£12,600; £11,900) towards costs associated with delivering Loophole Music sessions for people experiencing mental illness at Lambeth Hospital.	Caspar Cech-Lucas	£24,500
19284	GreenSeas Trust	06/07/2022	£40,000 over four years (£10,000; £10,000; £10,000; £10,000) to meet the capital costs of four BinForGreenSeas and project costs to deliver environmental workshops on plastic pollution. This grant is conditional on the organisation's safeguarding policy being reviewed and updated.	Lydia Parr	£40,000
19286	Greenwich Dance	23/08/2022	£84,360 over two years (£37,720; £46,640) for 0.4 of the Community Engagement Producer's salary; freelance Dance Artists' and Class Assistants' costs; space hire, marketing, the costs of performance tickets for beneficiaries and a contribution to overheads.	Julia Mirkin	£84,360
19486	Hackney Community Law Centre	05/09/2022	£160,000 over three years (£52,000; £53,000; £55,000) for a Tribunals Caseworker to provide advice and support benefit clients on appeals to the First- and Upper-Tier Tribunals, and as a small contribution to overheads.	Matthew Robinson	£160,000
19331	Hackney CVS	24/06/2022	£2,400 (6 days) to provide an eco-audit.	Lydia Parr	£2,400

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19254	Half Moon Young People's Theatre Ltd	05/07/2022	£3,235 to commission an independent access audit of the Half Moon Theatre venue.	Matthew Robinson	£3,235
19217	Haringey Somali Community and Cultural Association	13/06/2022	£197,380 over 5 years (£38,460; £38,930; £39,480; £39,980; £40,530) covering costs for 1 f/t Welfare Benefits Advisor and a contribution to HSCCA's overheads. Funding from year 3 onwards is conditional on confirmation that continued funding from London Borough of Haringey or equivalent funding is secured.	Anneka Singh	£197,380
19057	Harrow Carers	06/09/2022	£167,900 over five years (£32,600; £32,700; £33,500; £34,200; £34,900) towards the cost of a full-time Care Support worker and associated costs.	Sandra Jones	£167,900
19327	Health Equality and Rights Organisation	12/07/2022	£47,050 over two years (£23,250, £23,800) towards a 0.5FTE project worker to run peer support and social groups for older people, as well as associated project and management costs. Release of the second half of the year one payment and all of the year two payment is conditional upon Health Equality and Rights Organisation submitting a satisfactory updated safeguarding policy.	Abi Sommers	£47,050
19348	Hubbub Foundation UK	23/08/2022	£50,000 for one year towards the project costs of Grow Together's London projects.	Clara Espinosa	£50,000
19697	Inclusion London	24/08/2022	£25,000 to extend Inclusion London's 'Making it Work' service currently funded through Bridge to Work. This service works with young Disabled graduates who are on supported internships.	James Lee	£25,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19384	The Interlink Foundation	13/06/2022	£3,450 to resource Interlink Foundation to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme. This funding is to resource Interlink Foundation'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 Interlink Foundation's core running costs over the next twelve months.	Khadra Aden	£3,450
19151	ISLINGTON LAW CENTRE	21/07/2022	£127,800 over two further and final years (£63,000; £64,800) for a specialist Welfare Benefits advisor to provide client advocacy, casework, and representation for UC claimants as well as deliver training to frontline workers to deal with UC related issues.	Kelvin Ha	£127,800
19702	Katherine Low Settlement	01/09/2022	£2,600 (6.5 days) to provide an eco-audit.	Lydia Parr	£2,600
19340	Kongolese Children's Association	10/08/2022	£45,000 over three years (3 x £15,000) to help refugees, asylum seekers and migrants integrate within society and prosper economically through educational courses. Funding is conditional on receipt of a satisfactory reserves policy and trustees skills audit.	Hannan Ali	£45,000
19328	Learning Through The Arts	06/07/2022	£34,700 over two years (£17,350 x 2) towards 'Creative Wellbeing', covering 1.5 days p/w Project Officer, 15% rent contribution, tutors, volunteer expenses and related project overheads.	Anneka Singh	£34,700
19517	Lewisham Music	27/07/2022	£2,600 (6.5days) to provide an eco-audit.	Lydia Parr	£2,600

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19117	Living Way Ministries	19/07/2022	£65,500 over two years (£32,750 x 2) towards the costs associated with the food redistribution project applied for. Specifically, driver's salary, volunteer expenses, and food van maintenance. Please note that costs associated with the advice aspect of the project have been removed from the recommendation.	Caspar Cech-Lucas	£65,500
19361	London Symphony Orchestra	23/08/2022	£53,200 over two years (£26,000; £27,200) towards a creative music programme in partnership with local community centres in Islington to reduce social isolation and loneliness amongst older adults.	Hannan Ali	£53,200
19404	London Youth Rowing Limited	05/09/2022	£106,210 over three further and final years (£33,730; £35,380; £37,100) towards the Active Row SEND programme, covering 1 FTE Active SEND Coach and related project costs.	Anneka Singh	£106,210
19280	Loughborough Junction Action Group	02/08/2022	£84,500 over two years (£41,250, £43,250) towards an 0.6 FTE Farm Coordinator and 0.2 FTE Café Manager to run and train volunteers for outreach activities, and community growing, healthy eating and wellbeing sessions, as well as associated project and management costs. Funding is conditional on submission of a satisfactory vulnerable adults safeguarding policy.	Abi Sommers	£84,500
19226	Made in Hackney	05/07/2022	£83,000 over two years (£41,000; £42,000) to improve well-being in older people through healthy cookery classes, create a sense of inclusion through volunteering opportunities, and reduce isolation through community feasts. The release of the second year of funding is conditional on a satisfactory review of Made in Hackney's most recent accounts.	Hannan Ali	£83,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19128	MayDay Rooms	03/08/2022	£5,000 for an access audit to inform future accessibility developments to create a more inclusive building for wheelchair users and people with other mobility issues.	Hannan Ali	£5,000
19296	Metro Centre	07/09/2022	£220,600 over three years (£67,400; £76,000; £77,200) towards the development of Greenwich Giving, the funding to be received by Metro Centre on behalf of Greenwich Giving., conditional on being part of the London's Giving network and on using the London's Giving measurement tools.	Jenny Field	£220,600
19277	Middlesex Association for the Blind	06/07/2022	£50,000 over two years (2 x £25,000) towards the delivery of Middlesex Association for the Blind's home visiting service in Brent and Haringey enabling 85 elderly visually-impaired people to experience greater independence in their lives. Draw down of grant funding is conditional on Middlesex Association for the Blind having an agreed finance policy in place.	Gerard Darby	£50,000
19581	Money4YOU	31/08/2022	£100,000 towards Money4You's 2022 Dragons' Den award scheme, with funding restricted to groups delivering work of benefit to Londoners and constituted as registered charities or Community Interest Companies. 10% of the awarded funds to cover Money4You's delivery costs and oversight.	Tim Wilson	£100,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19335	Mums-Aid Maternal Mental Health Support	18/07/2022	£96,180 over two years (£47,450; £48,730) towards MumsAid Maternal Mental Health Support's YoungMumsAid work, covering costs for 0.1FTE YMA Service Manager, 0.1FTE YMA Service Co-ordinator, 0.5FTE Trauma Therapist, 0.2FTE Advocacy/Link Worker, a text service, and related organisational overheads.	Anneka Singh	£96,180
19692	New Philanthropy Capital	23/08/2022	£35,000 over six months towards the costs of a research project identifying and disseminating best practice in embedding service user involvement across third sector organisations.	Matthew Robinson	£35,000
19317	Newark Youth London	03/08/2022	£35,530 to deliver 'Back to Nature', a peer-led initiative to engage and connect young people across Tower Hamlets with environmental and nature-focused activities.	Nina Sofaly	£35,530
19123	Osmani Trust	13/07/2022	£4,150 to meet the costs of an independent access audit of the Osmani Centre, to provide recommendations to improve accessibility for all users	Lorna Chung	£4,150
19383	Outside In Pathways	04/08/2022	£30,750 over two years (£15,200; £15,550) towards Steppingstones, covering a 0.4 FTE Care Support Worker and related project costs.	Anneka Singh	£30,750
19373	The Parochial Church Council of the Ecclesiastical Parish of St Peter, Streatham	18/08/2022	£4,150 to meet the costs of an independent access audit and for some inclusive design training.	Gerard Darby	£4,150

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19407	Positive East	03/08/2022	£200,600 over two further and final years (£98,800; £101,800) for the GMI Partnership to support LGBT and black and minoritized communities in London. The grant is payable to Positive East.	Nat Jordan	£200,600
19272	The Purple Elephant Project	06/07/2022	£50,000 over two years (£18,000; £32,000) towards the salary of the charity's chief executive.	Gerard Darby	£50,000
19318	Rahab Project Limited	02/08/2022	£103,640 (£51,210; £52,430) over two years, covering a 3 days p/w Caseworker, staff and volunteer supervision, volunteer expenses and related organisational overheads.	Anneka Singh	£103,640
19378	Refugee and Migrant Network Sutton (RMNS)	16/08/2022	£64,350 over two years (£31,390; £32,960) towards an immigration advice service and ESOL classes up to level 3, covering 0.5 FTE Advice Worker, 0.1 FTE Admin Assistant, 0.1 FTE Outreach and Marketing Worker, drop-in activities, and related organisational overheads.	Anneka Singh	£64,350
19103	Remark! Community	02/08/2022	£126,600 over five years (£23,100; £24,200; £25,200; £26,300; £27,800) towards the running costs of the Remarkable! Club providing activities for London's Deaf community.	Wai Chan	£126,600
19477	Roj Women Association	23/08/2022	£86,200 over two years (£43,100 x 2) for an Older Persons project, covering 0.6FTE Older Peer Project Officer, 0.4FTE Project Co-ordinator, project activities and related overheads.	Anneka Singh	£86,200
19242	Root 'n' Branch CIC	24/06/2022	£19,190 over two years (£9,750; £9,440) towards the development of a green amenity space, covering project management, facilitation costs and related project overheads.	Anneka Singh	£19,190

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19523	SHAOLIN TEMPLE MARTIAL ARTS AND CULTURAL CENTRE C.I.C.	06/09/2022	£7,490 over one year for Taichi and Qigong classes for older people, covering coaching costs and related project overheads.	Anneka Singh	£7,490
19265	Signal Family Support Ltd	03/08/2022	£20,000 over two years (£10,000; £10,000) towards therapeutic counselling sessions for autistic children and young people, and their parents/carers.	Kelvin Ha	£20,000
19376	SOBUS	07/09/2022	£153,070 over three years (£50,650, £50,850, £51,570) towards the salary and running costs of a programme to address the underrepresentation of the voluntary and community sector, particularly BAME led organisations, in local service development and engagement opportunities in Hammersmith and Fulham. Staff costs will amount to £107,766 over three years and further costs include overheads, project running costs and some internal evaluation costs.	Catherine Hobbs	£153,070
19092	Southwark Law Centre	27/07/2022	£156,100 over three years (£43,800; £51,700; £60,600) for the salary costs of a full-time Paralegal up until and following qualification as a Solicitor, offering welfare benefits advice to low income private and social housing tenants facing eviction in Lambeth and Southwark. Direct project costs and a contribution to core costs are also included in the project budget.	Julia Mirkin	£156,100
19263	Spitalfields City Farm	18/07/2022	£100,000 over two years (£50,000; £50,000) towards the salary costs of the CEO and funding towards consultancy support around fundraising development and diversity and inclusion.	Gerard Darby	£100,000

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19465	Sport4Health Community Interest Company	03/08/2022	£21,300 (£10,500; £10,800) over two further and final years towards weekly free sports sessions supporting the physical health and mental wellbeing of Older People. This grant is conditional on receiving a satisfactory monitoring and evaluation report for the organisation's previous grant (reference 16574).	Caspar Cech-Lucas	£21,300
19347	Sporting Way C.I.C.	12/08/2022	£29,820 over three years (3 x £9,940) to provide a safe, caring space for children with special education needs to attend the youth club and engage in designated sport, play & emotional well-being activities.	Aasha Farah	£29,820
19369	St Botolph without Aldgate	26/09/2022	£50,000 towards the costs of the access works of the Aldgate Centre extension to the Grade I-listed St Botolph's church, providing accessible WCs and facilities for the community.	Matthew Robinson	£50,000
19234	Steps2Recovery	13/06/2022	£162,050 over three years (£52,650, £54,010, £55,390) towards the salary and oncosts of a new Chief Executive for Steps2Recovery.	Abi Sommers	£162,050
19203	Tapestry Care UK	18/07/2022	£56,500 (£33,500; £23,000) over two years towards the costs associated with TCUKL's high needs care work at Hubs in Havering. Costs are specifically for salaries, rent, partner delivery costs, and a contribution to overheads.	Caspar Cech-Lucas	£56,500
19029	Thames21	01/08/2022	£174,820 over a further three years (£57,450; £58,281; £59,089) for the costs of the Thames Connections project, including 1 FT Project Officer and a contribution to core costs.	Lily Brandhorst	£174,820

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19223	Thrive	30/06/2022	£95,000 core funding over two years (£50,000, £45,000) to support delivery of specialist therapeutic gardening programmes and outreach work in Battersea Park for vulnerable/disabled clients.	Hannan Ali	£95,000
19319	Touretteshero CIC	06/09/2022	£248,750 over four year (£51,000, £58,750, £66,000, £73,000) towards an 0.4 FTE Solidarity Coordinator and a 0.2 FTE Research and Consultancy Director to run Touretteshero's Solidarity Programme in London, as well as associated project, management, and access costs.	Abi Sommers	£248,750
19443	Toynbee Hall	14/07/2022	£50,000 over eight months towards Toynbee Hall's "Co-producing East London's recovery" project.	Tim Wilson	£50,000
19251	Trees for Cities	22/06/2022	£100,000 for Trees for Cities over two years (£50,000, £50,000) to create greener, healthier public spaces, co-designed with communities to increase residents' wellbeing and advance the London Urban Forest Partnership.	Hannan Ali	£100,000
19157	Women's Environmental Network Trust	23/08/2022	£72,000 for two further and final years (£35,350; £36,650) towards the Tower Hamlets Food Growing Network, including the 0.6FTE Project Coordinator; 0.1FTE Project Manager; the costs of the network gatherings; growing workshops; community food network events; materials for the development of community gardens and a contribution to WEN's overheads.	Julia Mirkin	£72,000
19233	XLP	24/06/2022	£2,800 (7 days) to provide an eco-audit.	Lydia Parr	£2,800

Ref	Organisation	DA Approval Date	Grant Recommendation	Funding Manager	Recommended Amount
19476	Youth Realities	16/08/2022	£80,340 over two years (39,780; 40,560) to increase the capacity of the YPVA programme, covering 1 FTE Youth Support Worker, 6 day trips per year and organisational overheads.	Anneka Singh	£80,340
Grand Totals (84 items)					£6,378,525⁸

⁸ The £25k variance to that reported in the table at Appendix 1 relates to a further £25k committed to Beacon Collaborative (Grant 19026) for a conditional grant that was approved for up to £350k in December 2021, but is being committed only as each milestone is reached. The remaining uncommitted conditional grant is included within the line 'conditional grants' in Appendix 1.

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Impact & Learning from our Funded Orgs

May - July 2022

Feedback on CBT

120

Impact &
Learning
Forms

87%

Rate us Very
Good (71%) or
Good (16%)

10

Anonymous
GrantAdvisor
Reviews

86%

Good rating
on "reaching
our goals"



APPLICATION TIME

Average: 33h ± 33h
One said 96 hours
(From GrantAdvisor)

APPLICATION TIME COMPARISON

PHF: 35h
Esmee Fairburn 17h
Lloyds 15h

APPLICATION ISSUES

"Be clear and avoid complicated English words or sentences"
Anonymous



EFFECT ON FUNDRAISING

90% said we have a positive impact on their fundraising



TREND: POSITIVE IMPACT ON FUNDRAISING

Last 3 quarters:
88% - 92% - 88%
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: CREDIBILITY

"A grant from City Bridge acts as a **positive kite mark** for our work and therefore has a positive effect on our broader fundraising."



Positive Comments



Common themes:

We are flexible, supportive & communicative; staff 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

- LEAP programme beneficial
- Media Trust film raised awareness with funders & community
- In-person meetings appreciated **New!**

"One of our staff members recently attended the Trust's **networking and learning day** at the Guildhall and found it both **inspiring and insightful**."

"We have benefited from **grantee meetings** and the opportunity to explore the Corporation of London **LEAP volunteering scheme**."

"Our dealings with the Trust have been **exemplary**. We have found the organisation to be **supportive, responsive and understanding** of the changing needs of survivors, particularly in very difficult times."



"We love CBT!"



Improvements for CBT



Provide additional funding for cost of living crisis; offer a Word version of online forms; clarify project aims when funding is revised; simplify process for continuation funding; improve communication if FM changes

"Our first grant was for one year only; we had to apply again for another two years' funding. Then you extended it again which meant that we had to apply again for another 2 years ... We will have **had to make three formal applications for 5 years' funding**. For a small group this has been a **huge burden** for us and we feel that the **process/ rules could have been more considerate/ sympathetic**."

"Please **provide a Word version** of your application form and report form on your website, that we could download to work offline, prior to submitting."
[Note we do this already - will be easier to find on new website]

"With the ongoing challenges around the **cost of living crisis**, could there be a mechanism to look at the value of the grant and where appropriate **take account of unexpected and increased costs**?"

continues below...

Project Changes and Learning



May - July 2022



FEEDBACK
RELATES TO:

BD
£12.7M
82 grants

iiL
£1.3M
14 grants

SI
£1.5M
7 grants

TOTAL
£16.4M
120 grants

PROJECTS REPORTING
CHANGES DUE TO
COVID

! 58% of projects
Last 3 quarters:
53% - 55% - 57%

TOP 3 REPORTED
CHANGE TYPES
DUE TO COVID

↑ Online Support
Hybrid
Getting back to
normal

PROJECT CHANGE
TYPE: BIGGEST DROPS
V FEB - APR 2022

↓ Hybrid
Pivot Provision
Suspended

Key Learning: Empowerment and Evaluation



"We have learned that we need to **empower those from within the community** to deliver some of the elements of the upcoming engagement and training. ... Our match funding and Yr 1 surplus will ensure that we can **hire in an Education Manager** which we will seek from within the community we are working with."



"We concentrate on things people with **Dementia CAN** do rather than think of things that make it difficult. ... There is a huge need for what we are providing."

"We involved young people in deciding what changes to make and evaluating how the changes are affecting them to assist us in determining which changes to keep long term. Digital learning **enabled them to develop skills and autonomy** to independently pursue other learning opportunities."

"We have increased our knowledge and experience of **measuring the impact of green social prescribing projects**. We will soon have the Thriving Communities partnership end of project report with additional evidence."

"**Maximising the use of our well established monitoring and evaluation systems** (including Google Forms and Telephone/WhatsApp surveys), to better analyse service users data enabling **more evidence based decisions**, reviewing processes and evaluating impact more efficiently."

Challenges and Concerns: Cost of Living Crisis



TOLL ON CLIENTS & STAFF

"The **cost of living crisis** and other events have taken a **high toll** on victims of domestic abuse and our frontline staff ... with **additional pressure** on their high case loads and **greater exposure to vicarious trauma**."

ONE CRISIS AFTER ANOTHER

"The real concern we have is the **impact that living through one crisis, followed by another**, is having on people's overall well-being and that the choice of "**heating or eating**" is a very real one our clients are facing."

NEED FOR SUBSISTENCE SUPPORT

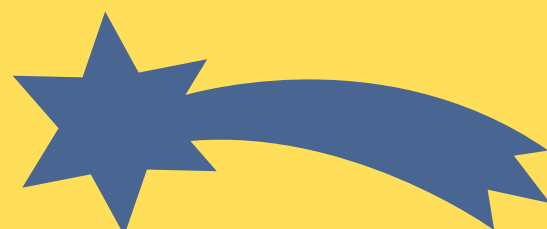
"We are **increasingly referring women to foodbanks** and seeking to obtain more food and transport vouchers. Sadly, we don't see any solution in the short term other than **continue seeking external support** to provide to the women we work with."

HARDER TO ADDRESS STRUCTURAL ISSUES

"Our member organisations and those they work with are **increasingly focused on day to day survival** which **limits their ability** to engage in longer-term work to **address the structural inequalities** that drive child poverty."

Positives: A Strategy of Joy

"We know that many elderly people are dealing with grief, ill-health, poverty and other issues. But **what we see is people who love to dress up and dance, be with their friends, laugh together, support each other** - and also welcome new people who need more joy in their life. This learning has helped us to **include joy as one of our organisation's new strategic aims**."



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

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