



Funding Committee of the Bridge House Estates Board

Date: MONDAY, 11 SEPTEMBER 2023

Time: 11.00 am

Venue: COMMITTEE ROOMS - 2ND FLOOR WEST WING, GUILDHALL AND VIA MICROSOFT TEAMS

Members: Paul Martinelli (Chair)
Deputy Nighat Qureishi (Deputy Chair)
John Griffiths
Deborah Oliver
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

Enquiries: Joseph Anstee
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Lunch will be served in the Guildhall Club at 1.00pm.

**Ian Thomas CBE
Town Clerk & Chief Executive
City of London Corporation**

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.

Part 1 - Public Agenda

Governance

1. APOLOGIES

2. DECLARATIONS OF INTEREST

3. MINUTES

To agree the public minutes and non-public summary of the meeting held on 12 June 2023.

For Decision
(Pages 7 - 12)

4. OUTSTANDING ACTIONS*

Report of the BHE Governance Officer

For Information
(Pages 13 - 14)

5. CHIEF FUNDING DIRECTOR'S REPORT

Report of the Chief Funding Director

For Information
(Pages 15 - 18)

Finance

6. BUDGET MONITORING REPORT FOR BHE FUNDING ACTIVITIES: PERIOD ENDED 31 JULY 2023

Report of the BHE Chief Funding Director and the BHE & Charities Finance Director

For Information
(Pages 19 - 26)

Bridging Divides - Funding Applications

7. SUMMARY OF BRIDGING DIVIDES*

To note a summary of the Bridging Divides programme.

For Information
(Pages 27 - 28)

8. **ANCHOR PROGRAMME ROUND ONE**
Report of the Chief Funding Director
- For Decision**
(Pages 29 - 134)
9. **STRATEGIC INITIATIVE: RESPONSIBLE FINANCE**
Report of the Chief Funding Director
- For Decision**
(Pages 135 - 140)
10. **STRATEGIC INITIATIVE: LONDON'S GIVING - RESOURCE HUB**
Report of the Chief Funding Officer
- For Decision**
(Pages 141 - 150)
11. **GRANT FUNDING ACTIVITY: PERIOD ENDED 24 AUGUST 2023**
Report of the Chief Funding Director
- For Decision**
(Pages 151 - 182)
12. **PROPEL PROGRAMME UPDATE**
Report of the Chief Funding Director
- For Information**
(Pages 183 - 190)

Strategy

13. **END-TO-END REVIEW OF CBF'S MAIN GRANT-MAKING PROGRAMME UPDATE**
Report of the Chief Funding Director
- For Information**
(Pages 191 - 192)
14. **WHAT AGE CBT CONSIDERS OLDER PEOPLE**
Report of the Chief Funding Director
- For Decision**
(Pages 193 - 196)

Other

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

16. 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

17. NON-PUBLIC MINUTES

To agree the non-public minutes of the meeting held on 12 June 2023.

For Decision
(Pages 197 - 202)

18. DECISIONS TAKEN UNDER DELEGATED AUTHORITY OR URGENCY*

Report of the BHE Governance Officer

For Information
(Pages 203 - 204)

Investments

19. SOCIAL INVESTMENT

Report of the Chief Funding Director

For Decision
(Pages 205 - 216)

Bridging Divides - Funding Applications

20. PIPELINE OF STRATEGIC INITIATIVES*

Report of the Chief Funding Director

For Information
(Pages 217 - 230)

Strategy

21. FUTURE FUNDING DIRECTION

Report of the Chief Funding Director

For Decision
(Pages 231 - 238)

22. TRANS INCLUSION AND STATE OF THE SECTOR

Report of the Chief Funding Director

For Information
(Pages 239 - 254)

23. COLD SPOT REVIEW

Report of the Chief Funding Director

For Decision
(Pages 255 - 266)

Other

24. 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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FUNDING COMMITTEE OF THE BRIDGE HOUSE ESTATES BOARD **Monday, 12 June 2023**

Minutes of the meeting of the Funding Committee of the Bridge House Estates Board held at Committee Room - 2nd Floor West Wing, Guildhall on Monday, 12 June 2023 at 11.00 am

Present

Members:

Paul Martinelli (Chair)
Deputy Nighat Qureishi (Deputy Chair)
John Griffiths
Deborah Oliver
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

Officers:

David Farnsworth	- Managing Director of Bridge House Estates
Sacha Rose-Smith	- BHE Chief Funding Director
Samantha Grimmett-Batt	- BHE Funding Director
Geraldine Page	- BHE Funding Director
Tim Wilson	- BHE Funding Director
Amelia Ehren	- BHE Head of Strategy & Governance
Hannan Ali	- BHE Funding Manager
Caspar Cech-Lucas	- BHE Small Grants Programme Funding Manager
Ruth Feder	- BHE Head of Impact & Learning
Julia Megone	- BHE Charities Technical & Strategic Finance Manager
Lydia Parr	- BHE Funding Manager
Anne Pietsch	- Comptroller & City Solicitor's Dept.
Joseph Anstee	- BHE Governance Officer

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

1. APOLOGIES

There were no declarations.

2. DECLARATIONS OF INTEREST

John Griffiths declared a standing interest by virtue of his employment with Rocket Science, which had previously worked with City Bridge Trust (CBT).

3. TERMS OF REFERENCE*

The Committee received its terms of reference, as agreed by the Bridge House Estates (BHE) Board on 15 May 2023. The Chair drew Members' attention to the

amendments to the Committee's terms of reference, including the addition of functions in respect of social investments.

The Chair then welcomed new Members of the Committee John Griffiths and Deborah Oliver, following their appointment to the Committee by the BHE Board. The Chair then gave thanks on behalf of the Committee to outgoing Members Judith Pleasance and Alderman Alison Gowman, particularly noting Alderman Gowman's years of excellent service to CBT, including on the former CBT Committee as a past Chair.

4. **MINUTES**

RESOLVED – That the public minutes and non-public summary of the meeting held on 6 March 2023 be agreed as a correct record.

5. **OUTSTANDING ACTIONS***

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

RESOLVED – That the outstanding actions list be noted.

6. **CHIEF FUNDING DIRECTOR'S REPORT**

The Committee considered a report of the Chief Funding Director providing an update on key areas of activity and outlining upcoming activities. The Chief Funding Director introduced the report and drew Members' attention to the key points, also updating the Committee on a recent visit to Lincoln as part of the LocalMotion Programme.

End to End Review

The Chief Funding Director advised that a Project Manager had been appointed and that focus so far had been on defining the scope and parameters of the review. Terms of reference for the core and advisory group were being developed alongside a detailed project plan, with a further update to be brought to the September meeting of the Committee.

In response to a question from a Member, the Chief Funding Director advised that working with other funders on best practice was within the scope of the review, and that the use of the phrase 'customer experience' could be amended to refer specifically to grantees.

Anchor Programme

The Chief Funding Director advised the Committee that 173 applications had been received as part of the programme, with 15 to be taken forward, adding that the high volume of applications demonstrated the demand for this type of funding. The Chief Funding Director added that officers were assessing the work so far for learning points in respect of the programme. In response to a question from the Chair, officers advised that CBT currently had 787 active grantees, although this was unusually high owing to the additional programme funding uplifts to support over 350 grant-holders with increased demand and increased costs.

Learning Visits

The Deputy Chair spoke positively about a learning visit that she had attended the previous week and encouraged Members to attend when they could, adding that there had been great feedback for CBT and very positive recognition of their work. The Chair added that he hoped the number of learning visits per year could be increased.

The Committee was advised that the intention was for 50 learning visits to take place during this year, jointly between Members and Funding Managers, with it aimed to approach the programme as equitably as possible, noting the previous experiences of some organisations. It was hoped that each Member of the BHE Board and the Funding Committee could attend one visit per year, with some having been scheduled.

CBT Audit

In response to a question from a Member, officers advised that CBT functions were captured within Crowe's audit of the whole of BHE, with planning work for the next audit of having started recently. CBT had also been audited by the City of London Corporation's internal audit function in the past, with another internal audit expected in the near future.

RESOLVED – That the report be noted.

7. **CBT DRAFT OPERATIONAL RISK REGISTER**

The Committee considered a report of the Chief Funding Director presenting the latest CBT Operational Risk Register and seeking the Committee's review of the Risk Register and confirmation that the risks are comprehensive, scored correctly and that appropriate control measures are in place. The Chair commented that the assessment or measurement of what was considered success on the part of CBT would be a key issue for consideration going forward.

RESOLVED – That the Funding Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as trustee of Bridge House Estates and solely in the charity's best interests:

- i) Approve the revised and complete CBT operational Risk Register.

8. **SUMMARY OF BRIDGING DIVIDES***

The Committee noted a summary of the Bridging Divides programme.

9. **ALLIANCE PARTNERSHIP: FIGHT FOR SIGHT/VISION FOUNDATION**

The Committee considered a report of the Chief Funding Director seeking approval of a grant of £500,000 to Fight for Sight/Vision Foundation towards the Vision Fund, a grantmaking programme aimed at reducing isolation and tackling mental health issues within the sight loss community. The Funding Director introduced the report and presented the proposal to the Committee. The Committee noted a correction to the report, that the overhead costs outlined within the budget section should read 8% of the overall cost, rather than 3%.

In response to a question from a Member, the Chief Funding Director advised the Committee that Vision Foundation had done substantive work on minority representation, having made it a priority for the organisation and agreeing a strong Diversity, Equity and Inclusion Policy.

Noting that the end of the Alliance Partnership programme was approaching, the Chief Funding Director advised that officers would undertake an evaluation of the programme before bringing recommendations back to the Committee for a decision regarding next steps.

The Chair then drew Members' attention to the recommendations, which were agreed.

RESOLVED – That the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests, approve a grant of £500,000 over two years, as an Alliance Partnership, to Fight for Sight/Vision Foundation [charity no: 1111438 (formerly 1074958)] for running costs and onward grant making as part of the Vision Fund. A payment timetable will be drawn up in line with the launch dates of the four funding rounds, and the related payments to onward grant recipients.

10. **GRANT FUNDING ACTIVITY: PERIOD ENDED 24 MAY 2023**

The Committee considered a report of the Chief Funding Director providing details of funds approved and rejected under delegated authority since the last meeting of the Funding Committee in March 2023 through to 24 May 2023; the remaining 2023/2024 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 seeking approval for 2 grant rejections and 7 grants between £250,000 and £1,000,001. The Chair introduced the item and commended officers for the substantive work and positive output of 110 grants for the year so far. The Committee also provided positive feedback on the revised format and model for the heat maps provided, noting that a report reviewing 'cold spots' would be brought to the September meeting of the Committee.

The Chair then drew the Committee's attention to the Bridging Divides grants recommended for approval and took each proposal in turn. With regards to the application from YMCA West London, the Committee noted that officers were following up on receiving a reference for the organisation from a previous funder and agreed the recommendation, subject to the receipt of a suitable reference.

A Member commented on the innovativeness of the project within the application from Carefreespace, adding that this model could be considered for application elsewhere. The Chief Funding Director responded that it had potential for use with social investment. The Member continued that the proposal represented an innovative and potentially exciting solution to what could be considered an issue with social care funding. The Committee noted its concern regarding the direction of the social care market in London, given possible issues in the future. The Chief Funding Director advised that CBT would be careful to provide support for the

sector as well as leverage the charity and City Corporation's position to provide an appropriate level of challenge where possible.

In response to a question from a Member, the Chief Funding Director advised that Carefreespace provided a referral pathway through community partners as well as a self-referral process, which would enable access for those with digital literacy issues.

The Chair then drew the Committee's attention to the applications recommended for rejection. A Member, noting the reasons for rejection given against applications considered under delegated authority, commented that many applications seemed to be rejected on the basis of a lack of eligibility, and queried whether the communication of eligibility criteria could be improved. The Chief Funding Director advised that this was regularly reviewed with it aimed for the application process to be as inclusive and accessible as possible. The Chief Funding Director added that officers were taking forward a suggestion from the Deputy Chair to make bitesize videos for the website to assist with areas in which applicants struggled.

In response to a question from the Chair, the Chief Funding Director advised that CBT's rejection rate was around 50%, which compared favourably with other funders, and that it was intended for the application process to be as sympathetic as possible. The Committee was assured that proposed rejections were given full scrutiny before the decision to reject was taken, before noting that additional points in respect of rejections would be discussed in non-public session.

RESOLVED – That the Funding Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Receive this report and note its contents;
- ii) Approve the following grants as recommended;
 - You Make It - £560,000 over five years
 - British Refugee Council - £317,505 over five years
 - YMCA West London - £262,200 over three years
 - Aston-Mansfield - £262,785 over four years
 - The Health Forum - £270,000 over five years
 - Women's Health and Family Services - £269,725 over five years
 - Carefreespace - £500,000 over three years; and
- iii) Approve the rejection of grants as listed in the schedule appended to the report.

11. **CORNERSTONE FUND UPDATE**

The Committee received a report of the Chief Funding Director updating the Committee on Round 2 of the Cornerstone Fund and highlighting additional learning gleaned from Round 1. The Chief Funding Director confirmed that Round 2 was underway and was currently live.

RESOLVED – That the Funding Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity’s best interests, receive the report and note its contents.

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

There was no other business.

13. **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.

14. **NON-PUBLIC MINUTES**

RESOLVED – That the non-public minutes of the meeting on 6 March 2023 be agreed as a correct record.

15. **OFFICER DELEGATION LEVELS**

The Committee considered a report of the Chief Funding Director.

16. **SMALL GRANTS REVIEW**

The Committee considered a report of the Chief Funding Director.

17. **PIPELINE OF STRATEGIC INITIATIVES***

The Committee received a report of the Chief Funding Director.

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

There was no other business.

The meeting ended at 12.29 pm

Chair

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

Funding 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.	5 December 2022	Application Turnaround Times	Sacha Rose-Smith	12 June 2024	-	<p>The application backlog has now been cleared, with all of these applications having been allocated and under assessment.</p> <p>Application turnaround times will be reviewed as part of the end-to-end review, which is due to conclude in June 2024, with an update provided on today's agenda.</p>	

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Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: BHE Chief Funding Director's Update Report	Public
Report of: Sacha Rose-Smith, BHE Chief Funding Director	For Information

Summary

To support the Funding 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: additional context to the meeting's budget monitoring report, Suicide Prevention work, the Local Motion programme, the BHE and City Corporation's Joint Philanthropy Strategy, City Giving Day, and an update on Impact and Learning. Separate items on today's agenda further provide updates on the Anchor and Propel programmes and the End-to-End Review.

Recommendations

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Note the contents of the report.

Main Report

Bridging Divides Funding Updates

1. Aanchal Women's Aid – The Committee will be welcoming current CBT grantee Aanchal Women's Aid (No. 1113180) to today's meeting for a presentation and discussion on their work. Established in 1984, Aanchal Women's Aid is a Redbridge-based registered charity that provides support, assistance and advice to Black, Asian and Minority Ethnic women experiencing abuse. The charity is funded by CBT until 2025, for salary costs for a full-time advisor/advocate post, volunteer expenses and a contribution to core costs, to deliver support to high-risk women and their children.
2. Budget Monitoring Report – Additional Context – The report at agenda Item 6 notes a forecasted increase in responsive grant making of £16m (from £49m to £65m). Due to timeline changes in other programmes, the overall spend for the year is still expected to be within the overall approved budget for this financial year. The Funding Directors have closely monitored first quarter spend rate, spend rate YTD, current assessments in hand, and application trends across the last six months to produce this more accurate forecast.
3. When the original budget was prepared in December 2022, it acknowledged the challenge of predicting spend-rates for the year, due to the uncertain post-Covid landscape across the sector. In the preceding 24 months, a number of other funders frontloaded their budgets to provide emergency funding, launched new redirected strategies, or closed their doors to develop new strategies, which added to this unpredictability.

4. The increase in responsive spend is likely due to factors including increasing pressure in the voluntary sector, the continued closure of several significant funders, and the cost-of-living crisis. These factors have led to adjustments in individual grant amounts during assessment (due to increased inflation) an increase in demand for many of the services funded under CBT's responsive programmes, which are significantly focussed around reducing poverty.
5. Furthermore, the introduction of clearer and revised funding criteria and a new website enhanced both the transparency of our funding priorities and searchability and navigation which has led to increased applications. The spend rate in the first quarter is higher than anticipated in the latter quarters due to the closure and reopening of our application portal due to a database switchover, which also led to a surge in applications. Finally, outreach has been stepped up as we have returned to face-to-face funder fairs and increased other forms of outreach, such as programme specific webinars. The increase does not impact in-year or future year grants budgets, and the strategy refresh will examine responsive spend rates in detail to ensure that, as always, in future years funding is only awarded in line with funds available.
6. The budget monitoring report also notes timeline shifts affecting the Anchor Programme and Propel Programme budgets for this financial year. However, other programme reductions lead to expectation of spend being within the overall approved budget.
7. Suicide Prevention – Sacha Rose-Smith, Chief Funding Director, continues to develop this work, supported by Abi Sommers, Funding Manager. Currently in the scoping phase, officers are analysing available data and awaiting the upcoming release of the Government's latest suicide prevention plan. Sacha and Abi are collaborating with the City of London Corporation team which is hosting a suicide prevention conference in October. Sacha and Abi will be hosting a series of roundtables for key stakeholders which will connect with the conference. Plans are also underway to support people with lived experience to feed into the development of the funding programme.
8. LocalMotion – LocalMotion is a collaboration between CBT and five other funders, joining forces to tackle economic, environmental, and social inequality in six places. CBT is aligned to Enfield, and Sacha Rose-Smith, Chief Funding Director, continues to support the ongoing development of this work as part of the Local Core Group in Enfield and as part of the Direct Delivery group. The group are busy finalising their road maps for the next 8 years. The Enfield visit was planned for July but had to be rescheduled, due to underground strikes making travel difficult for those involved. A new date has been rearranged for September; however, we are exploring with LocalMotion the option to combine the Enfield place visit with the forthcoming Learning summit which is planned for November.
9. A combined place visit and learning summit was successfully achieved earlier this year in Carmarthen and enabled those attending to forge a deeper connection and explore practice and learning over two days, also alleviating the necessity of people being asked to travel significant distance in a relatively short period of time. These

dates are likely to be the 14th and 15th November 2023 and will be confirmed soon. A subsequent report will be brought to the December Funding Committee meeting to set out recommendations regarding CBT's future involvement with LocalMotion.

Philanthropy

10. Following the conclusion of the external consultancy undertaken by Corporate Citizenship and team consultation to support the development of the Joint Philanthropy Strategy review, work is now underway to present options for consideration by the BHE Board and P&R Committees. Officers are currently finalising the dates for when these options will be presented for discussion, noting the interplay between BHE and the Corporation on final conclusions, and the imperative to ensure that costings for subsequent work are provided in good time for sign off through the relevant budgeting and business planning procedures.
11. The Philanthropy Director has shaped an event to mark City Giving Day which is an annual initiative of The Lord Mayor's Appeal on 26 September 2023. The event will focus on EDI developments in funding practice and will include representation from CBF in relation to the learning we are amassing through the development and roll out of the Anchor Programme. Other speakers include London Funders, New Philanthropy Capital (NPC) and Islington Giving. The event will take place in the Basinghall Suite from 14.00 – 15.30 (with 30 minutes of networking afterwards) and all Board Members are welcome to attend. Alderman Professor Emma Edhem will be welcoming delegates in her role of BHE EDI lead, with Deputy Nighat Qureishi concluding proceedings.

Impact and Learning

12. Since the Funding Committee last met in June, Funding Managers have undertaken a further 8 learning visits with organisations funded by CBT. Two of these were attended by the Funding Committee Chair, Paul Martinelli, one by Alderman Alison Gowman and one by the Managing Director of BHE, David Farnsworth. There are a further 10 learning visits currently scheduled.
13. Funded organisations tell CBT that they need space and time to reflect on their work and would like more contact. Learning visits address these needs. Funding Managers carefully plan visits and create a supportive setting by asking open questions that encourage funded organisations to consider challenges, solutions and successes in their work. After visits, Funding Managers and Members reflect on their learning and share insights with BHE colleagues and Members, which informs future decision making.
14. Each Member of the Funding Committee is given the opportunity to attend at least one learning visit per year, to meet staff at funded organisations, hear about their successes and challenges and share thoughts on issues in London. Members are matched with visits according to their interests and areas of expertise. Funding Managers contact Members directly with learning visit suggestions.
15. The ethos of these visits is that of respected colleagues discussing issues of mutual interest, rather than BHE monitoring or checking (monitoring happens

separately), and officers consciously work to reduce the power imbalance between BHE as funder and the funded organisations. Visits to equity organisations are prioritised.

16. In August, Natalie Heath joined the Impact and Learning team as Impact and Learning Officer. Natalie has Psychology and Teaching qualifications and brings valuable training skills gained as a Primary School teacher. She will be planning and delivering Learning activities for staff and funded organisations.

Conclusion

17. This report provides a high-level summary of CBT activities since the Funding Committee last met in June 2023. The Funding 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 Funding Committee orally in the meeting or in written format in advance of or as a follow-up to the meeting.

Sacha Rose-Smith

Chief Funding Director, Bridge House Estates

E: Sacha.Rose-Smith@cityoflondon.gov.uk

Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: Budget Monitoring Report for BHE Funding Activities: Period Ended 31 July 2023	Public
Report of: The Chief Funding Director & The BHE & Charities Finance Director	For Information
Authors: Helen Martins, Business Partner: Grant Funding, Philanthropy & Communications and Sacha Rose-Smith, BHE Chief Funding Director	

Summary

This report provides a financial update on Bridge House Estates (BHE) Funding activities to 31 July 2023 and an updated forecast for the financial year ending 31 March 2024.

BHE Funding's approved budget is £105.67m comprising of £101.5m allocated to grant commitments, £3.85m to operational costs, and £0.32m to recharges. Revised grants forecast for the year is £99.47m. Further details are provided at paragraphs 4 to 8 of this report.

Recommendation

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates 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 Funding Committee of the BHE Board, this report presents a financial update on funding activities and the latest 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 £179.9m.
3. Funding Dashboard at **Appendix 1** shows expenditure on grants, year-to-date grants spend by programme area, and Funding Directorate's expenditure year-to-date actual and high-level expenditure summary. BHE Funding's Actual Spend v Budget and Latest Forecast at **Appendix 2** provides an overview of BHE Funding's financial results as at 31 July 2023, and a forecast position for the 2023/24 financial year as compared to the latest approved budget.

Grants

4. At the end of July 2023, grant commitments were £22.45m, an underspend of £4.13m in comparison to the year-to-date budget.
5. Following reviews, grant commitments forecast for the year is revised to £99.47m, against a budget of £101.50m. The revised forecast considers the analysis of the first quarters grant commitments, current assessments in hand, and application trends across the last six months to produce a more robust forecast.
6. A change in Propel programme design timeline has led to some of the proposed spend being deferred to the next financial year with a reduced forecast of £7.6m due to a revised programme design (see agenda Item 12 on today's agenda).
7. A change in the Anchor programme timeline has led to an increase forecast of £7.68m, due to revised programme design leading to a frontloading of the budget (see Agenda item 8 on today's agenda).
8. As a result of increased pressure on the voluntary sector, the continued closure of several significant funders, inflationary pressures and the cost-of-living crisis, the responsive grant making forecast has been revised upward by £16m against the original budget. These factors have led to adjustments in individual grant amounts during assessment and an increase in demand for many of the services funded under our responsive programmes.
9. Appendix 1 is a graphic representation of grants information and the funding directorate's finance summary for the year 2023/24.
10. Detailed analysis of the grants can be found within the Grant Funding Activity Report (Item 11 on today's agenda).

Operational Costs

Employee Costs

11. The year-to-date underspend of £85k on employee cost has arisen due to vacancies in posts, namely Social Investment Associate, and Apprentice posts.

Professional Fees

12. The Professional Fees underspend as at 31 July 2023 was £135k. Fees earmarked for operational cost due to the uplift in grants expenditure is forecasted to underspend by £310k. This is in line with the reduction in grants forecast, with consultant and other operational costs forecasted to be less than previously budgeted.

Supplies and Services

13. Supplies and Services is overspent year-to-date due to the invoicing pattern for the new grants management system software. With the new system in place, the forecast reflects the full year expected spend.

Depreciation

14. The charge for depreciation represents a general allocation of depreciation on the Guildhall facility.

Recharges

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

Conclusion

16. Funding is delivering strongly on responsive grant programmes, and large grant spend anticipated through the Anchor programme, with the Propel programme also forecasted to award large amount of grant funding in Q3 and Q4. For these reasons, funding commitments are almost in line with budget with a forecasted variance of £2.0m underspend.

Appendices

- Appendix 1 – Funding Dashboard at 31 July 2023
- Appendix 2 – BHE Funding's Actual Spend v Budget and Latest Forecast

Helen Martins

Business Partner – Grant Funding, Philanthropy & Communications

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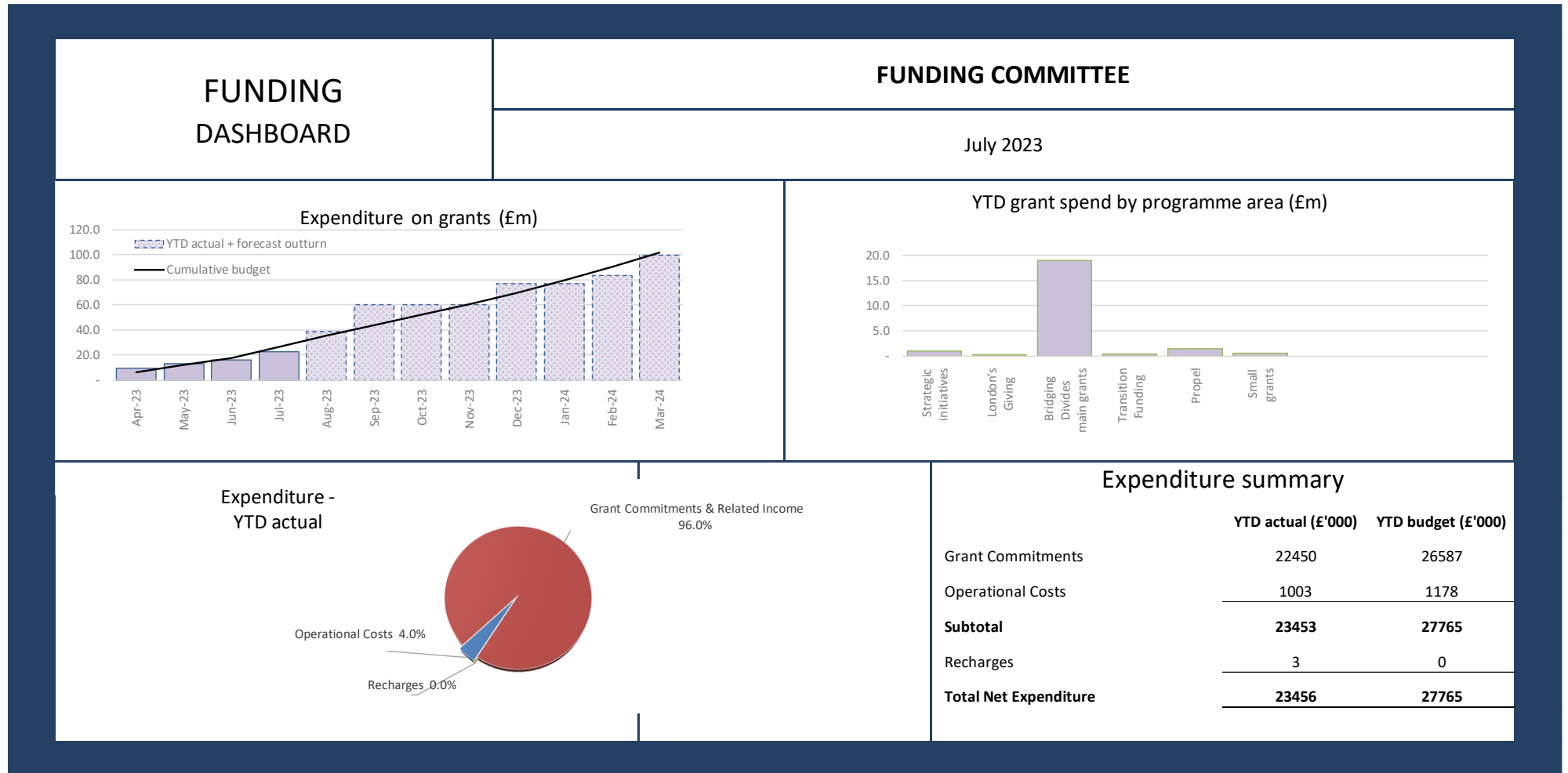
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Appendix 1 - Funding Dashboard at 31 July 2023



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Appendix 2 – BHE Funding’s Actual Spend v Budget and Latest Forecast

	Year to Date 31 July 2023			Annual - 2023/24		
	Actual	Latest Approved Budget	Variance	Forecast Outturn	Latest Approved Budget	Variance
	£'000	£'000	£'000	£'000	£'000	£'000
Grant Commitments						
Grants	(22,450)	(26,587)	4,136	(99,470)	(101,500)	2,030
Total Grant Commitments	(22,450)	(26,587)	4,136	(99,470)	(101,500)	2,030
Operational Costs						
Employees	(773)	(858)	85	(2,585)	(2,732)	147
Professional Fees	(116)	(251)	135	(529)	(839)	310
Supplies and Services	(114)	(70)	(44)	(255)	(261)	6
Depreciation	-	-	-	(17)	(17)	-
Total Operational Costs	(1,003)	(1,178)	176	(3,386)	(3,850)	464
Recharges	(3)	-	(3)	(328)	(328)	-
Total Net Expenditure	(23,456)	(27,765)	4,309	(103,184)	(105,678)	2,494

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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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Committee: Funding Committee of the Bridge House Estates Board Bridge House Estates Board	Date: 11 September 2023 26 September 2023
Subject: Anchor Programme Round One	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Decision
Report authors: Sam Grimmett Batt, Funding Director; Khadra Aden, Head of Anchor Programme; Clara Espinosa, Head of Anchor Programme	

Summary

The Anchor Programme aims to grow stronger, more resilient communities for a London that serves everyone. At its heart is a commitment to achieve change for Londoners at a systemic level by providing long-term, core funding to civil society organisations (CSOs) which provide infrastructure support to London’s voluntary and community sector. The fund aims to achieve the following:

- a. Capacity building: improving capacity to engage in positive structural change
- b. Wider knowledge sharing within civil society
- c. More equitable outcomes for London’s marginalised communities
- d. A more balanced funder/grantee relationship with a deep focus on the funded organisations’ learning journey
- e. Resourcing infrastructure organisations with an equity focus at a meaningful level in terms of both length and value of funding, supporting true financial sustainability
- f. Impacting London’s civil society at a systemic/systems change level
- g. Demonstrate leadership within the funding community by awarding funding that is both core (rather than project) and long-term (up to ten-years)

For this programme, only organisations which met the “Anchor Programme CSO” criteria were eligible (henceforth referred to as “Anchor CSOs”). Anchor CSOs are defined as second-tier infrastructure organisations that are well grounded within their community, (or multiple communities if working intersectionally, see Appendix 1), that convene, catalyse, and connect people (or organisations) and improve their lives. Anchor CSOs were also required to demonstrate an equity focus.

This paper summarises the Anchor Programme, its background, aims and objectives, and activity to date, updates the Committee on the plans for Round Two, and recommends an additional allocation of **£5m** bringing the total allocation to **£25m**. The paper will also present 15 Round One applications totalling **£15,948,630** for decision today. Individual assessment reports for each application are included in your agenda pack.

Recommendations

It is recommended that the Funding Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity’s best interests:

- i) Agree an additional allocation of £5m to the Anchor Programme, bringing the total allocation to £25m.
- ii) Endorse to the BHE Board the recommendations for funding of the following six grants (totalling £7,888,670):
 - a. £1,491,000 over ten years to Action for Race Equality (charity no. 1056043) at Appendix 8a;
 - b. £1,500,000 over ten years to Alliance for Inclusive Education (charity no.1124424) at Appendix 8b;
 - c. £1,408,400 over ten years to Consortium LGBT (charity no. 1105502) at Appendix 8c;
 - d. £1,202,900 over ten years to Imkaan (charity no.1105976) at Appendix 8d;
 - e. £1,003,000 over seven years to Spectra CIC (charity no. 07975254) at Appendix 8e;
 - f. £1,283,370 over ten years to The Interlink Foundation (charity no. 1079311) at Appendix 8f;
- iii) Endorse to the BHE Board, in principle subject to the following conditions being met, £1,048,500 over seven years (£149,200; £149,600; £150,000; £149,800; £149,900; £150,000; £150,000) towards core costs to help The Ubele Initiative (TUI) develop a 'Centre of Financial Excellence' and support Black-led organisations overcome systemic barriers in the voluntary sector (found at Appendix 8g).

Confirmation of the award and the first payment will be subject to the following conditions:

- The TUI Directors/Board confirm and provide satisfactory assurance that they have considered, understood, and accepted the risk of taking on liability for advice provided within the Centre of Financial Excellence.
 - TUI confirms that the role of Chief Finance Officer (CFO) is in post and will determine the staffing structure, roles, and Job Descriptions for the new Centre, noting that the CFO may wish to consider the use of consultants to provide advice.
- iv) Approve the following eight recommendations (totalling £7,011,460):
 - a. £999,990 over eight years to Council of Somali Organisations (charity no. 1154667) at Appendix 8h;
 - b. £979,370 over seven years to End Violence Against Women Coalition (EVAW) (charity no. 1161132) at Appendix 8i;
 - c. £993,700 over eight years to Galop (charity no. 1077384) at Appendix 8j;
 - d. £999,200 over ten years to HEAR Equality and Human Rights Network (charity no. 1168591) at Appendix 8k;
 - e. £979,500 over seven years to Inclusion Barnet (CIO no. 1158632) at Appendix 8l;
 - f. £591,300 over seven years to Migrants Rights Network (charity no. 1125746) at Appendix 8m;
 - g. £925,000 over ten years to Muslim Charities Forum (charity no. 1166149) at Appendix 8n;

- h. £543,400 over eight years to Southall Community Alliance (charity no. 1104671) at Appendix 8o.

It is recommended that the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- v) Approve the recommendations for funding of the following six grants (totalling £7,888,670):
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Main report

Aims and Objectives

1. The Anchor Programme was co-designed by a group of CSOs and is based on the following principles and vision (refer to Appendix 3 for the timeline of activities):
 - a. Provide long-term grants to support the sustainability of the sector by:
 - i. Reducing the need for constant fundraising, allowing organisations to focus on core mission and retention of key talent.

- ii. Supporting systems-change (see Appendix 1) by allowing for work to take place over a meaningful length of time that can realistically yield measurable change.
- iii. Supporting organisations to develop and sustain institutional knowledge and memory.
- b. Account for the intersections within society
- c. Address root causes of inequity rather than the symptoms and contribute to structural change within the sector.
- d. Support organisations where work is led by and for, or at least co-designed by the organisations/communities they support.

Budget Update and Plans for Round Two

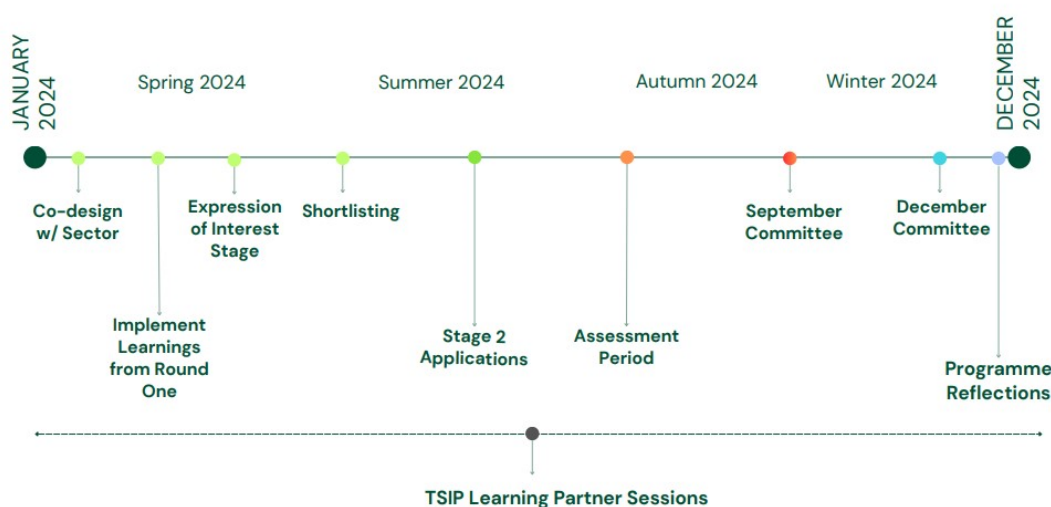
2. The Committee originally agreed an allocation of £20m towards the Anchor Programme on 20 June 2022 across a two-year period. No recommendation was made at that time as to how much would be spent in each year in order to remain flexible and able to embed learning as the programme developed.
3. It had been initially envisaged that the £20m would be split evenly across two rounds in 2023/24 and 2024/25, with approximately £10m spent in each year. In reality, once the programme was more fully worked up and the volume and quality of applications received in Round One was analysed, the decision was taken to frontload the £20m to meet demand. Just under £16m of recommendations have been brought to the Committee for consideration today, which leaves £4m remaining for Round Two.
4. Permission is therefore sought to allocate a further £5m towards the Anchor Programme, bringing the total allocation to £25m. This £5m will be included in the budget for 2024/25, along with the remaining funds from the initial allocation. As part of initial planning for the 2024/25 budget the Funding Directors have worked with the BHE & Charities Finance Team to identify available funds. This has formed part of the wider spend planning for 2024/25 and will not impact other planned programmes for that year, with the final budget to be presented to this Committee in December 2023.
5. Given the level of interest and number of applications received in Round One, officers are confident that there will be sufficient quality applications in Round Two to award the full £8.9m. Plans for the final distribution of funds (assuming the £5m additional allocation is approved) are set out below.

Development grants (2022/23)	Round One (2023/24)	Round Two (2024/25)	Total
£0.1m	£16.0m	£8.9m	£25.0m

6. Plans for Round Two of the Anchor Programme are being developed. It is envisioned that Expressions of Interest will open in spring 2024 with recommendations taken, potentially, to September or December's funding Committee in 2024. The underlying principles of the fund will remain the same including the co-design element. Learning from Round One will be incorporated such as:

- a. The importance of building trust with organisations participating in the co-design sessions, including increasing the number of in-person meetings.
- b. We aim to learn from the high rejection rate by narrowing the criteria for Round Two.
- c. We will use the most common declination reasons from Round One to feed into the design of Round Two, and the eligibility criteria.
- d. Keeping track of reflections and formalising it so we can share learnings, particularly around the co-design process with the wider funding sector.

Anchor Programme - Round Two 2024



Round One Proposals for Consideration

7. These grants, if agreed, are to be distributed as long-term core grants, of between seven to ten years. CBT's usual assessment processes have been applied including financial, governance, and other due diligence. Applicants could apply for between £50,000 per year and £150,000 per year, for up to ten years.
8. A total of 173 expressions of Interest were received at stage one in April 2023. 30 organisations were longlisted, this was further narrowed down to a shortlist of 15, who were invited to submit an application in stage two. As predicted, following trends in the funding sector and lack of multi-year core funding available, the number of applications recommended for approval represent a small proportion of the total number of applications received (nine percent).
9. A high number of applications was expected, and staff did incorporate a strategy to attempt to mitigate this throughout the application stage. However, reflecting on the rejection rate will feature as a key component of the Anchor learning activities and changes will be incorporated into Round Two to embed this learning.
10. The mitigation strategy included:

- a. A communications plan which included creating a dedicated web page with information on the aims of the Anchor Programme and the eligibility criteria, as well as an FAQ page to answer queries organisations had asked prior to submitting an application.
 - b. A blog explaining the origins of the programme and co-design process.
 - c. Two webinars to provide more information about the programme and answering eligibility questions directly from prospective applicants. A total of 75 organisations attended these sessions and positive feedback was received.
11. Unsuccessful applicants have been signposted to other relevant CBT programmes, such as the Infrastructure Strand. A dedicated webpage was also created listing the most common declination reasons and a webinar will be delivered to organisations which require more support. Additionally, the most common declination reasons have been analysed and will feed into the design of the second round of the programme.
12. The recommendations presented to you today focus on bringing about systemic change by enabling Anchor organisations to use core funding towards core activities such as supporting central staff roles to enable movement building (see Appendix 1), to strengthen organisation's governance, to support policy and research teams, and to expand second-tier capacity building work (refer to Appendix 6 for the background report on the use of Anchor core funding).
13. Before applications were assessed, external systems change and systems thinking training was undertaken by all assessors.
14. CBT's responsive grant making (its day-to-day grant making as opposed to strategic work such as the Anchor Programme) policy does not usually award revenue grants that include posts at more than one Full Time Equivalent (FTE). This limit was not applied to Anchor Programme applications to reflect learning from previous funding programmes such as Propel, the London's Giving scheme, and The Cornerstone Fund, which highlighted a recognised need for meaningful investment in strategic programmes looking to achieve ambitious outcomes at scale. Learnings from Round One of the Anchor Programme will be shared widely with colleagues across CBT and will also feed into the end-to-end review.
15. In addition to this, the usual responsive grantmaking policy not to exceed 50% of an organisation's total income was not applied as an eligibility criteria. This is in recognition of CBT's role as a significant funder of London's civil society infrastructure. Restricting applications from organisations already in receipt of significant CBT funding could limit impact (especially because this existing funding is for specific and focused projects, rather than the organisation's core activity and mission).
16. Additionally, because the Anchor Programme focuses specifically on organisations with an equity focus (e.g., those led by and for communities with protected characteristics), there is a further balance to be considered as there is only a small number of these organisations working in London and so to limit applications would

unfairly inhibit these organisations working on niche thematic areas (e.g., the LGBT+ sector).

17. For any organisation for which the Anchor proposal under consideration equates to (or cumulatively equates to, in conjunction with other CBT grants) more than 50% of their total funding, this has been specifically highlighted in the assessment report (there are two such recommendations). Assessors have undertaken a specific analysis of the ongoing sustainability of the recipient organisations. This assessment involves the assessor satisfying themselves that the funding, if approved, will not create a “funding cliff edge” for the organisation, and that they have a sufficient ongoing fundraising strategy and income diversification plans.
18. A number of other applicants under consideration are in receipt of current funding in one or more of CBT’s other programmes (but the cumulative funding does not equate to more than 50% of overall funding). This other funding includes standard responsive grants and other strategic programmes such as The Cornerstone Fund. This funding is for specific project work which is in line with our focused criteria for those programmes. This was considered during assessment, and assessors are confident that there is no duplication of funding across different programmes.
19. Following grant awards, a bespoke monitoring framework (incorporating regular, at least annually, monitoring points) will be devised with the Learning Partner, which will incorporate our standard requirements, checks and balances during the grant period, as well as assessment of the ongoing sustainability of the funded organisation. Funding will be paid in quarterly instalments, as per the usual CBT policy.
20. CBT’s standard grant terms and conditions will also apply for each grant, which include robust safeguards protecting CBT throughout the entire grant period (Appendix 5). This includes the ability to stop payments at any time should the terms and conditions be breached. As with the usual terms and conditions, these safeguards are considered sufficient to allow you to agree each grant commitment in full at the point of the award (there is always the option of including additional conditions to a funding decision which are pre-requisites to the award and there is one such example in your paper).
21. In addition to a monitoring framework which complies with our audit and regulatory requirements, the Anchor Programme Learning Partner, TSIP, is leading on the development of a shared learning and evaluation framework that captures progress of the funded work and the shared principles and ambitions of the collaboration. This will include a participatory systems mapping workshop to support funded organisations to think through what they want to influence, and one-to-one learning interviews to capture progress from an individual perspective. This work will also inform the planning for Round Two of the Anchor Programme.

Conclusion

22. There are estimated to be around 700 civil society infrastructure bodies in the UK, spending over £500m a year¹. Most are regionally based, and the majority are small, with more than 80% having an annual income of less than £1m. Over the last 12 years there has been a decline in funding available to infrastructure organisations, with spending not matching growth in the sector². Further background information about the infrastructure sector can be found at Appendix 2.
23. Over the last 25 years CBT has underpinned London’s civil society infrastructure with its grants and has been a driving force in not just funding but also innovating in this sector. The Anchor Programme continues this by not just supporting those organisations delivering change on the ground and with reactive and emergent work, but also the important underlying networks and expertise that allow it to happen. It builds on the legacy of our responsive infrastructure funding, the Cornerstone Programme, Civil Society Roots, and our practice during the pandemic.
24. The programme is generating a lot of excitement and interest in the sector. The Anchor team has received multiple requests from other funders to share learning on the programme, particularly the co-design element. A blog sharing learning so far was published on 9 March 2023³. The programme has been described as “game changing” for the sector. Following Round One, there are plans to hold a reflection session to share learnings on the programme and which may in future encourage leverage of other’s money into this funding area.
25. Round Two will encompass an iterative approach, and the additional allocation of £5m (bringing the total allocation to £25m) will, if approved, enable new grants to be made which learn from the delivery of Round One and also build on the exciting and transformational work that the Round One funded organisations will lead.
26. Funding civil society infrastructure and systems change supports CBT in its mission to reduce inequality and grow stronger, more resilient and thriving communities in London. The Anchor applications presented for consideration today, totalling **£15,948,630** (including one in principle recommendation for £1,048,500), propose ambitious, pan-London work over the next seven to ten years that will provide vital resource and capacity to affect systems change on issues that impact some of the most marginalised and underserved communities in London.

Background Paper

- Report to the Funding Committee, entitled ‘Anchor Programme Update’, date 20 June 2022, (Item 9)
- Report to the Funding Committee, entitled ‘Ten-year Grants’, dated 9 March 2022, (Item 20)
- Report to the former City Bridge Trust Committee, entitled ‘Interim Review of Bridging Divides’, dated 25 March 2021.

¹ [360 Giving report](#)

² [Sector Infrastructure Funding Analysis – 360 Giving \(2023\)](#)

³ <https://www.citybridgetrust.org.uk/news-and-blog/the-story-of-the-anchor-programme>

Appendices

- Appendix 1 - Definitions
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- Appendix 5 - Risk mitigation (excerpt)
- Appendix 6 - Use of core Funding
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- Appendix 8 – Grant applications
 - Appendix 8a - Action for Race Equality
 - Appendix 8b – Alliance for Inclusive Education
 - Appendix 8c – Consortium LGBT
 - Appendix 8d – Imkaan
 - Appendix 8e – Spectra CIC
 - Appendix 8f – The Interlink Foundation
 - Appendix 8g – The Ubele Initiative
 - Appendix 8h – Council of Somali Organisations
 - Appendix 8i – End Violence Against Women Coalition
 - Appendix 8j – Galop
 - Appendix 8k – HEAR Equality and Human Rights Network
 - Appendix 8l – Inclusion Barnet
 - Appendix 8m – Migrants Rights Network
 - Appendix 8n – Muslim Charities Forum
 - Appendix 8o – Southall Community Alliance

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Appendix 1 – Definitions

Civil society (or voluntary and community) infrastructure

The engine that drives civil society/the voluntary and community sector – the cross-cutting system of support, guidance, and expertise available to ordinary civil society organisations. Civil society infrastructure encompasses the organisations, networks and systems that connect frontline delivery organisations, communities, policy makers and thinktanks, and the academic, public, and private sector and which, together create the “whole” that is the wider sector.

Second-tier organisations

Organisations which have a primary purpose focused on supporting other charities and non-profits, rather than delivering frontline services.

Equity focus

Organisations that are ‘led by and for’ the communities they serve, and which are progressive and inclusive in their ways of working. Often, they work with communities with protected characteristics (or otherwise marginalised communities), and they may work intersectionally (across more than one community).

Intersectional/intersectionality

Intersectionality is a term coined by civil rights advocate Kimberlé Crenshaw in 1989. She initially used the term to explain the specific experiences of Black American women, who experience both racism and sexism. In this instance, intersectionality recognises that a Black woman will experience racism differently from a Black man, and that a Black woman will experience sexism differently from a white woman. The term is now used more widely to talk about a wider range of intersecting identities, including factors such as migration status, disability or age, all of which can affect the different types of discrimination or unfair treatment faced by communities and individuals.

Movement building

Movement building is organising and motivating people to work towards a collective vision or cause that is important for a community. In other words, it is the process of bringing forward a powerful idea and getting other people to join the cause, resulting in a compounding effect that gets the message in front of policymakers and the general public.

Systems change/systemic focus (also see Appendix 4)

Systems change work acknowledges that to address the complex challenges in the world today the underlying systems that underpin human societies and behaviour will have to change. Systems change is underpinned by the idea of addressing the causes, rather than the symptoms, of a societal issue by taking a holistic view of the system and attempting to shift the component parts; its underlying models, structures, and worldviews, and the pattern of interactions between them, to create a new system (or systems) that behave(s) differently. Within civil society and the voluntary and community sector, systems change work focuses often on addressing the causes, rather than the symptoms of inequality, and requires a shift in mindset from linear thinking to embracing complexity and interconnectedness, as well as working across organisational and sectoral boundaries and scales.

Appendix 2 - Background of Infrastructure Sector and CBT's Involvement

- There have also been significant closures and mergers in the infrastructure sector, coupled with a growth in the number of charities, Community Interest Companies (CICs), and other voluntary and community groups. This has resulted in an overall decline in the number of infrastructure bodies offering support. For infrastructure organisations that are “led by and for” their communities, the funding available is even more scarce and often limited to short, unpredictable, project-based funding cycles which limits work aiming to achieve long term change. These specialist organisations are often least able to pay for services without grant funding. CBT will be one of only a small number of funders offering up to ten years of core funding, and, as far as we are aware, the only funder offering this long-term support to vital equity focused infrastructure organisations.
- There is little data available describing the state of the infrastructure in London specifically. However, we know that in 2020/21 an estimated 10,700 organisations and community groups were actively engaged in infrastructure support from London's Council for Voluntary Service (CVS)⁴ network, in the form of advice, guidance and support, training, networking opportunities and other events. CVS's make up only one part of the infrastructure sector, and the total number of organisations supported across the capital by the entire infrastructure network is therefore likely to be even higher.
 - Recently, the importance of the infrastructure sector for civil society generally, and in London, has been acknowledged in a number of reports and events:
 - A recent insight meeting hosted by London Funders, read the insight briefing [here](#).
 - A [report](#) on London's CVS network.
 - A [report](#) by Resource for London, in which Sam Grimmett Batt (Funding Director and one of the authors of this paper) is quoted, on the general state of London's infrastructure sector.
 - And finally, [this report](#) from 360Giving, on funding in the infrastructure sector.
- Infrastructure groups are key to ensuring effective and efficient support and information, and a safety net for organisations to fall back on. There can be a false perception (particularly amongst the general public) that change, and impact only emerge from front-line activities that are tangible. Infrastructure organisations do however have a role to play in delivering public benefit and advancing social justice and diversity, equity, and inclusion in the sector, by supporting capacity building, convening, and catalysing. Their work promotes knowledge exchange and equity, higher quality services, and greater sharing and collaboration, and reduces duplication.

CBT and London's Civil Society Infrastructure

- CBT has long recognised the importance of civil society infrastructure, offering support to these organisations through its responsive grant programmes since its inception. Since 2015, it has spent more than £20m supporting such work, and now

⁴ [London Plus- London CVS Network Impact Report \(2023\)](#)

spends between £3m and £5m a year through rolling, responsive grant programmes and strategic initiatives. CBT has been a founder or seed funder of many of London's key infrastructure bodies, including London Plus, London's Giving, and the Council of Somali Organisations. CBT also funds strategically on this theme, including seed-funding and continuing to fund [Catalyst](#) to support digital infrastructure, and funding innovative network infrastructure such as Healing Justice London and shared infrastructure such as Grant Advisor, IVAR, and the Foundations Practice Rating. We regularly co-fund with other infrastructure funders like the National Lottery Community Fund, Paul Hamlyn Foundation and Trust for London and convene events.

- The Anchor Programme follows as the logical next step in a series of infrastructure focused strategic collaborations that CBT has founded and/or participated in. In 2015, to mark its 20th anniversary, CBT awarded a series of special strategic grants for infrastructure bodies, some of which were at risk of closing. In 2016, CBT produced the "Way Ahead" report⁵ with London Funders and other stakeholders, which focused specifically on London's civil society infrastructure and how its key organisations connected across London and should be resourced. This led to focused investment in the sector for the first time, with CBT developing the Cornerstone Fund, a collaboration with the National Lottery Community Fund and Trust for London.
- The Cornerstone Fund supported consortiums of infrastructure organisations working together to tackle pan-London issues in 2017/18 and 2021/22. Concurrently, CBT worked with the Mayor of London and the National Lottery Community Fund to deliver two rounds of the Civil Society Roots programme in 2017 and 2022/23, which also provided funding to infrastructure organisations, but focused on supporting those with an equity focus.
- However, these programmes only provided short term funding. The learning from them has informed the development of the Anchor Programme significantly and, if the recommendations are approved, will continue some of the work begun in these programmes (for example, the Ubele Initiative received some of its early seed funding via Civil Society Roots, and Consortium LGBT+ received Cornerstone funding which has informed its mission now)⁶.
- The Anchor Programme has also been influenced by CBT's pandemic work, in particular the equity focus and innovation that it undertook during the delivery of the London Community Response Fund (LCRF) and by programmes from other funders, such as the Growing Great Ideas fund by the National Lottery and the Racial Justice fund by Trust for London (which CBT also co-funds).

⁵ [The Way Ahead, 2016](#)

⁶ [Capacity to change - Resource for London \(2023\)](#)

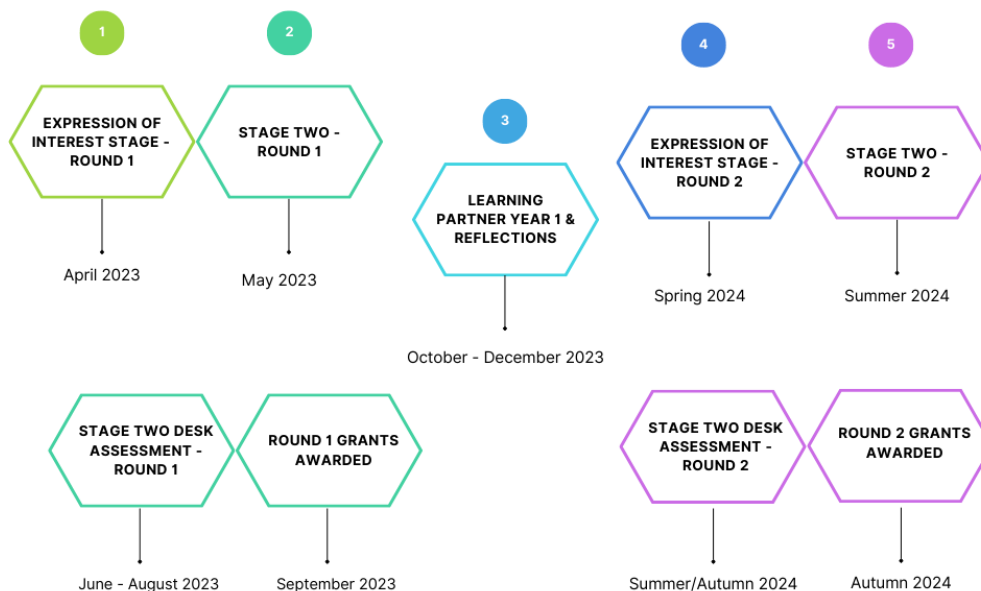
Appendix 3 -Timeline of Activities to date

Work on the Anchor Programme began in earnest following the approval of three key recommendations by the former Grants Committee:

- a. On 22 March 2021, that grants of up to ten years could be awarded in both Propel and Anchor Programmes.
 - b. On 9 March 2022, to award long term (up to ten-year) grants in order to respond to the recognised need for long-term core (as opposed to project) funding as a pre-requisite for systemic work addressing the root causes of inequality.
 - c. On 20 June 2022, to allocate £20m of funding to the Anchor Programme.
- **January 2022:** Task and finish group established and agrees overarching co-design principle. External facilitator, The Social Innovation Partnership (TSIP), delivers a facilitated roundtable, focused on reducing power imbalance and underpinning principles of collaboration and equity. 15 CSOs attend, sharing expertise to co-design what the programme might achieve and how.
 - **April- June 2022:** Design group made up of 22 CSOs attend five sessions to inform the overall aims and objective of the programme (additional invitees added to include those communities not represented at the roundtable). This led to the following principles and vision:
 - a. Provide long-term grants to support the sustainability of the sector by:
 - i. Reducing the need for constant fundraising, allowing organisations to focus on core mission and retention of key talent.
 - ii. Supporting systems-change by allowing for work to take place over a meaningful length of time that can realistically yield measurable change.
 - iii. Supporting organisations to develop and sustain institutional knowledge and memory.
 - b. Account for the intersections within society
 - c. Address root causes of inequity rather than the symptoms and contribute to structural change within the sector.
 - d. Support organisations where work is led by and for, or at least co-designed by the organisations/communities they support.
 - **August 2022:** TSIP appointed as Learning Partner to develop learning framework and incorporate a reporting approach. The learning framework will include challenging the traditional funder/grantee dynamic and supporting funded organisations to learn from their own work and each other through peer learning sessions. Learning activity will include four interactive discovery workshops and development of the overarching learning framework, and it is envisaged that it will also include over the course of the partnership:
 - a. Evaluation plan support sessions for funded organisations
 - b. Innovation exchange opportunities
 - c. Action learning workshops
 - d. Learning interviews

- e. Funder feedback sessions
 - f. Four biannual reports
 - g. Guest learning blogs
 - h. Development of a communications calendar
- **November 2022:** Khadra Aden and Clara Espinosa, appointed as joint programme leads, begin implementation of the Anchor Programme.
 - **November - December 2022:** Advisory panel of CSOs formed, with operational focus on the application process and communications strategy. A two-stage application process was piloted to follow suggested sector wide best practice outlined in the IVAR's actions to improve funding⁷.
 - **January – April 2022:** Operationalisation of Anchor Programme and launch of Expression of Interest stage.
 - **May 2023:** Shortlisting panel of CSOs supported the Anchor team to narrow down Expressions of Interest.
 - **June 2023:** Second stage applications received (see paragraph 8), and robust assessments undertaken by CBT Funding Manager over three months.

Anchor Programme Timeline



⁷ [IVAR practical actions to improve funding](#)

Appendix 4 - Anchor Criteria

Expression of interest

- That your organisation is a second-tier organisation that provides services and support for frontline organisations, strengthening London's civil society
- That your organisation has an intersectional and equity focus, and works with users identifying with one or more of the following characteristics: Age, Disability, Gender / Gender reassignment / Gender identity, Immigration status, Maternity, Sex, Sexual orientation, Socio-economic status, Race / Ethnicity, Religion / Belief
- That your organisation is led by and for the people it works to support. As an indication, this might be at least 75% of the Board of Trustees or Management Committee AND at least 50% of senior staff self-identifying as from a specific community or protected characteristic.

In some cases, we will accept organisations that can demonstrate clear evidence of taking significant steps to be more representative. For example, you may be working towards becoming anti-racist or working in a trauma-informed way.

Alternatively, you will be able to demonstrate that your organisation has appropriate mechanisms for involving underrepresented communities in the development of your organisational strategy.

Application Stage

- That you understand the complexity of systemic change, and can make a clear case of how you will advance systemic change in London's civil society
- That you can show that your organisation is embedded in the community or communities you support. Applicants should be able to demonstrate that they have a track record of engagement with broad-based movements
- That you can demonstrate how you work in partnership with other organisations to further equity and justice, by supporting one another and influencing policy and/ or the wider sector
- That you can demonstrate how you advocate for smaller frontline organisations
- That you can demonstrate how your organisation has an appetite to pilot new ways of working and to be experimental

Appendix 5 - Risk Mitigation (excerpt from previous paper received by the Grants Committee on 9 March 2022).

Excerpt 1:

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

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

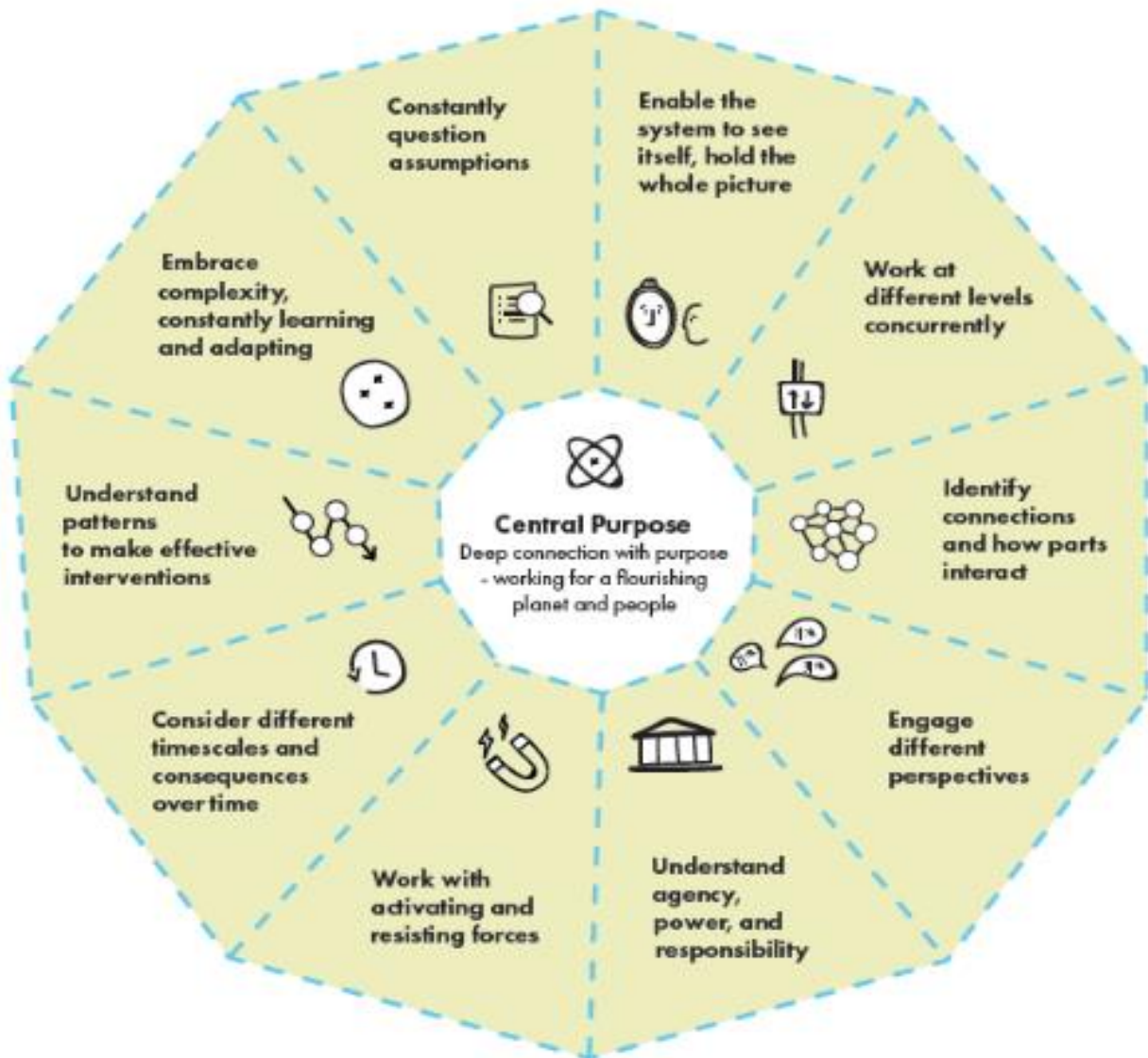
Appendix 6 - Use of Core Funding

Core funding will enable the recommended organisations to work on the following:

- Develop policy and research to contribute to structural change in the sector; including hiring research and policy officers
- Strengthen organisation's core functions such as finance and governance
- Increase capacity building support to enable movement building such as providing advice and guidance to frontline organisations
- Provide long term financial stability to core strategic roles to allow organisations to work on their long-term strategy
- Develop key, equal partnerships with organisations and communities that are often excluded, marginalised and minoritised
- Help build and/ or improve digital platforms and CRM (Customer Relationship Management) systems
- Plan and look ahead to anticipate challenges and opportunities for the sector in the next decade, and to inform and support groups to be able to respond creatively and effectively
- Develop partnerships and create a space for networking, convening groups and supporting them to share their knowledge and insights with a wider audience
- Set up representative advisory boards to inform future plans
- Create an environment that supports movement building and where activism and solidarity is possible (instead of simply firefighting)

Appendix 7 - Systems Change

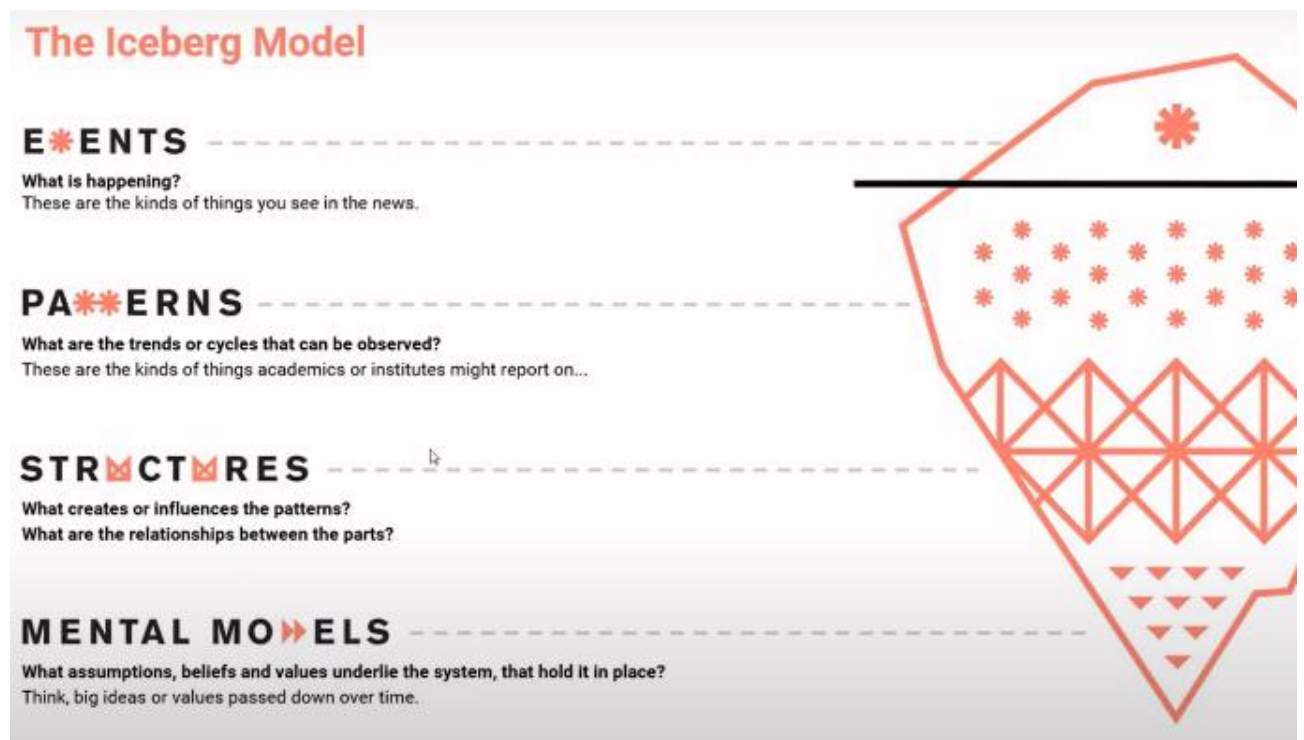
The focus of the Anchor Programme is to look at how organisations are addressing the root causes of inequality rather than the symptoms of it. To help assessors understand this concept, two external facilitators, [Louise Armstrong](#), and [Jessica Romo](#), were hired to deliver two training sessions. Both facilitators had worked on the evaluation of Paul Hamlyn Foundation's [Backbone Fund](#).



The sessions focused on what systems change is in context of the Anchor Programme, looked at examples of systemic issues that applications might be addressing and explained system change practices using the wheel below which was developed by the [School of System Change](#).

The iceberg model is a systems thinking tool that can be used to understand the underlying causes of a problem or event. It is typically presented in a visual manner, with acknowledgment of the event or problem above the surface of the water and the underlying patterns and causes at different levels below the surface.

This tool helps us to understand the nature of the power structures, the design of the system and behaviours that are contributing to the event at the tip of the iceberg.



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MEETING: 11/09/2023

REF: 20481

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Action for Race Equality	Adv: Lorna Chung
Amount requested: £1,491,000	Base: Islington
Amount recommended: £1,491,000	Benefit: London-wide

Purpose of grant request: core funding is requested towards four salaries, consultant fees, evaluation, and overhead costs to enable ARE to continue to support London's BME-led voluntary sector.

The Applicant

Action for Race Equality (ARE) - previously known as BTEG (Black Training and Enterprise Group) - is a registered charity (no. 1056043) established in 1996. ARE works across London boroughs (and nationally) to end race inequality for Black, Asian, and Mixed Heritage communities. ARE works with organisations, groups and individuals in the public, community, voluntary and private sectors on a range of programmes and projects that directly address barriers to racial inequalities through improving outcomes and opportunities for young people who are affected by the inequalities in education, training, and the criminal justice system. Around 80% of ARE's work is with the London voluntary sector. It delivers its mission through a range of programmes, educational work, training, consultancy, policy, and research. ARE seeks to address the causes and consequences of racial inequality. Well regarded by policy makers, ARE has acted in an advisory capacity to several government departments.

Background and detail of proposal

ARE currently holds a Strategic Initiative grant with City Bridge Trust (£400k over three years), with funds resourcing the pan-funder Windrush Justice Programme. The charity is closely involved with the "Moving on Up" project, which City Bridge Trust and Trust for London are supporting to increase employment rates amongst young black men in London. ARE has historically held City Bridge Trust grants for its work in building capacity in the Black, Asian and Mixed Heritage sector under our primary programmes – most recently funding the 'BAME Connectivity Programme' which focused on collaboration, organisational development, and strategic leadership.

Under the Anchor Programme, ARE seeks core funding over ten years to increase the capacity of its second-tier functions. Contributions are requested towards consultant fees, external evaluation, and overhead costs. Salary contributions also are requested towards four positions: CEO (0.3FTE), Head of Policy (0.3FTE), UPLIFT Programme Manager (0.6FTE) and Project Support Officer (0.2FTE). Funds requested towards the Programme Manager salary, Project Support Officer salary and consultant fees will enable ARE to introduce an additional organisational development programme to increasing its capacity building support to London's Black, Asian and Mixed Heritage sector. UPLIFT (programme name to be finalised) will be aimed at 'uplifting' organisations and their leaders through tailored one to one

support, whilst empowering them to raise awareness of the issues they are facing in mainstream spaces. It aims to support around 250 organisations through the programme, significantly increasing its capacity to provide organisational support to the sector. The model will be based on successful elements of its other capacity building programmes which have been developed and refined. Past capacity building programmes have been co-designed with Black, Asian and Mixed Heritage organisations at various stages. For instance, its pathways to employment programme (funded by JP Morgan Chase and London Community Foundation) was co-designed from its inception with six organisations from the Black, Asian and Mixed Heritage sector. In addition, it regularly sources input from the organisations on its programmes. ARE works collaboratively recognising that engagements and insights from specialist grassroots organisations are crucial to understanding the geopolitical and socioeconomic factors affecting the different communities it works with – especially in the current fast changing environment.

Within UPLIFT, consultants will carry out an initial assessment before advising on the best method of support – this can range from intensive help on one specific project to a broader look at systems and processes. All organisations will be based in London and not currently in receipt of ARE support. Funds are also requested towards external evaluators who will work with UPLIFT participants – performing baseline tests and developing KPIs to measure the impact of support. The outcome of this is not only a robust evidence base that organisations can use to demonstrate their impact, but also evaluation of the effectiveness of the overall programme (which can be refined over the course of the grant). A lack of capacity to evidence impact is a key challenge of the Black, Asian and Mixed Heritage sector and funding is requested to address this.

Though a relatively small organisation, ARE is well positioned and connected with national and regional governments (particularly in London). It acts as an advisor and critical friend to public and private sector actors such as the Ministry of Justice, Department for Education, Greater London Authority, and the Metropolitan Police. ARE establishes systemic change is achieved through addressing the causes rather than the symptoms of racism, and that it is the policies of many UK institutions that foster racist inequalities. It therefore influences decision-makers to be more inclusive and anti-racist. It uses its expertise to advise on racial justice issues such as stop and search, use of force, the gangs violence matrix and the racial gap between educational and employment outcomes – where appropriate connecting frontline organisations to institutions directly. At present, ARE is working with the Work and Pensions Minister to implement a target figure for employment amongst young Black men in relation to that of young white men. Funding is sought for ARE's policy work via a contribution towards its Head of Policy salary. Short-term funding has meant that retaining staff to this position has been challenging, an issue that the funding via this grant will seek to mitigate.

ARE meets the Anchor Programme criteria. It provides second-tier support, supporting over 1,200 organisations in some capacity over the past 20 years. ARE is user-led, run by and for Black, Asian and Mixed Heritage people. It has additional mechanisms to ensure that the voices of young people are integrated into decision

making processes. These include the creation of an advisory board made up of young Black men, and the presence of an ex-service user on its trustee board. ARE takes an intersectional approach to its work, highlighting that across Black, Asian and Mixed Heritage communities there is a range of diversity, and that race intersects with gender, disability and social class. Where ARE doesn't have representation of certain protected characteristics, it draws on its established networks for input as necessary.

Additionally, ARE meets the Anchor Programme criteria by taking a systems change approach to its long-term goal of eradicating racial inequalities. This approach is outlined in its theory of change strategy. This framework outlines the organisations ways of working towards evidence-led change to bring about improved policy making, legislation and compliance. It also outlines how it will work with stakeholders and partners to build collective voice for change, so that people who live with racial inequality have equal and equitable access to opportunities and outcomes.

London's Racial Justice sector

Specialised funding to Black, Asian and Mixed Heritage-led infrastructure organisations ended in 2011. In 2010 there were over 50 Black, Asian and Mixed Heritage-led infrastructure organisations in England, but funding cuts led to the closure of 17 of the largest organisations (and many smaller-sized ones). These closures left gaps in the reach during the pandemic with many funders struggling to reach the communities most in need of support. ARE was able to bridge some of these gaps and scaled up its grant-making due to its ability to reach Black, Asian and Mixed Heritage-led organisations across the sector. It continues to distribute grants, for example through the £1.3m Windrush Justice Fund (in part funded by City Bridge Trust) and the Stronger Futures (SF) programme. SF is funded by the Mayor's Violence Reduction Unit and is aimed at enabling community-led groups to support vulnerable young Londoners after school hours. ARE has well-established networks including voluntary organisations, statutory bodies, funders, and private sector organisations. It is a champion of collaboration – collaborating itself with peer organisations in the sector (e.g. through the Alliance for Racial Justice) whilst also encouraging collaboration amongst the organisations it supports to build collective voice.

ARE's services are increasingly vital in the context of a declining number of Black, Asian and Mixed Heritage infrastructure organisations. The effects of this are compounded by the challenges of the pandemic and the cost-of-living crisis. Black, Asian and Mixed Heritage organisations have been disproportionately affected by these challenges, resulting in a lack of capacity, funding, and growth at a time when the needs of communities are growing. The result, in line with wider voluntary sector trends, is reduced capacity and higher demand.

Financial Information

Most of its income is generated through grants from foundations and local authorities. It experienced significant growth over the pandemic period, with income rising from £430k in 2019/20 to £807k in 2020/21. Much of this growth is due to its increased grant making activities over this period, as the organisation is well

positioned to reach organisations in the BME sector. Income growth is sustained and is set to rise to £1.1 million in 2022/23 and £1.2 million in 2023/24. Forecasts include ARE's Windrush Justice strategic initiative, but do not include Anchor Programme funding.

ARE aims to hold six months core expenditure in free reserves. In 2021/22 the organisation held over its target with £507k in unrestricted reserves. A small unrestricted surplus in 2022/23 increases free reserves to £559k, bringing them further over target level. Though the organisation holds reserves over target level, trustees plan to raise ARE's reserves target to £500k. This decision will be discussed at its next board meeting. The £500k target includes funds needed for new staff positions following a strategic review (which is to be finalised). It realises some posts created through the review will need to be partially or fully funded from reserves whilst it seeks grant funding for these positions. Holding reserves at this level is therefore appropriate.

Year end as at 31st March	2022	2023	2024
	Signed Accounts	Management Accounts	Budget
	£	£	£
Income & expenditure:			
Income	946,822	1,122,382	1,197,809
Expenditure	(819,713)	(903,126)	(1,197,809)
Surplus/(deficit)	127,109	219,256	0
Reserves:			
Total restricted	96,853	264,343	264,343
Total unrestricted	507,117	558,883	558,883
Total reserves	603,970	823,226	823,226
Of which: free unrestricted	507,116	558,882	558,882
Reserves policy target	304,000	355,000	407,000
Free reserves over/(under) target	203,116	203,882	151,882

Funding History

ID	Type	Meeting Date	Decision
19453	Strategic Initiatives	20/06/2022	£400,000 over three years (£160,000; £160,000; £80,000) towards the pan-funder Windrush Justice programme. Funding is restricted to the small grants, capacity building, and convening elements of work, with all monies restricted for the benefit of Londoners.
16138	COVID19 Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £13,750, equivalent to one regular quarterly payment for the organisation's current grant. COVID19
14540	Investing in Londoners	02/05/2018	£110,000 over two years (2 x £55,000) for the "BAME Connectivity Programme" with funding to cover the costs of a part-time (0.7 FTE) Project Manager and support costs.
12410	Investing in Londoners	27/11/2014	£165,000 over three years (3 x £55,000) for the Valuing Volunteers Project?? with funding to cover the costs of a part-time (0.7 FTE) project manager and support costs.
10529	Working with Londoners	17/02/2011	£110,000 over two years (2 x £55,000) towards a programme of bespoke personal and organisational development for BME organisations across London.

The Recommendation

ARE is an established and reputable second-tier organisation, with a mission to eradicate systemic racial inequality in education, training, and the criminal justice

system. It's second-tier support is increasingly vital against the backdrop of a declining number of Black, Asian and Mixed Heritage infrastructure organisations. This proposal meets the priorities of the Anchor Programme.

ARE has confirmed that inflationary increases will be allocated from reserves over the course of the grant. This will be reviewed on an annual basis and if required the organisation will source additional funds (from grants etc.). This is a sustainable proposal– it currently holds healthy levels of unrestricted reserves.

Funding is therefore recommended in full and as follows:

£1,491,000 over ten years (£149,000; £149,000; £148,000; £149,500; £149,000; £149,500; £149,000; £149,000; £149,000; £150,000) towards core costs to enable Action for Race Equality to continue to support London's BME-led voluntary sector including contributions towards CEO (0.3FTE), Head of Policy (0.3FTE), UPLIFT Programme Manager (0.6FTE) and Project Support Officer (0.2FTE) salaries.

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MEETING: 11/09/2023

REF: 20385

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Alliance for Inclusive Education
Amount requested: £1,500,000
Amount recommended: £1,500,000

Adv: Abi Sommers
Base: Lambeth
Benefit: London-wide

Purpose of grant request: To strengthen the charity's ability to challenge systemic barriers to inclusive education and support other Disabled-led organisations.

The Applicant

Alliance for Inclusive Education (ALLFIE) is a registered charity (no. 1124424), established in 1990 to promote inclusive education as a right for all Disabled people. ALLFIE is a pan-impairment Disabled People's Organisation (DPO)¹ which endorses the social model of disability.² ALLFIE advocates for inclusive education for all Disabled people in the UK but primarily operates in London, where all but one of its staff members are based. London is the major focus of ALLFIE's work given its proliferation of DPOs and its position as a nexus for policy change. ALLFIE's primary activities include leadership and capacity building, campaigning, influencing and educating, promoting best practice, and amplifying Disabled people's voices. These activities are London-focused but have been known to have a wider impact.

Background and Detail of Proposal

ALLFIE has received prior funding from the Trust towards its Inclusion Champions project. This project equipped DPOs in London to better engage Disabled children, young people and their families, through training, networking, and sharing resources and information. Despite pandemic disruptions, the project was successful and ALLFIE met all its initial target outcomes. Outcomes included improved coproduction and intergenerational working, and a focus on the intersectionality of Disabled people's experiences. The project generated key learnings for ALLFIE around the disparities between Disabled people's experiences across boroughs, the financial state of the DPO sector, and the impact of inequalities on Disabled people's experiences.

ALLFIE is applying for ten years' core funding to strengthen its ability to challenge systemic barriers to inclusive education. Inclusive education includes everyone, with non-disabled and Disabled people learning together in mainstream settings. This requires the education system to recognise that it creates barriers for Disabled learners and adapt to include them. Despite the ratification of the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD) which recognises the right to inclusive education³ and evidence that inclusive education benefits

¹ DPOs are run by and for Disabled people. Based on criteria from Inclusion London, an organisation is a DPO if, 1) its Management Committee or Board has 75% of representation from Disabled people; 2) 50% of its paid staff team are Disabled people at all staff levels and; 3) it provides services for or work on behalf of Disabled people.

² The social model of disability, developed over the last 40 years by Disabled people, holds that people with impairments are 'disabled' by the barriers operating in society that exclude and discriminate against them.

³ Article 24 – Education: <https://social.desa.un.org/issues/disability/crpd/article-24-education>

Disabled and non-disabled learners⁴, the UK still has a segregated system. The number of children in segregated 'special schools' continues to rise.⁵ For children in mainstream schools, many still receive segregated provision, e.g. in Special Educational Needs (SEN) units. Where Disabled children receive all their education in mainstream settings, significant barriers remain and needs are often not met. This is integration not inclusion. Barriers include inaccessible built environments, lack of understanding of and access to assistive technology, and lack of staff training.⁶ System change is vital as segregated education is both a cause and a consequence of poverty. Poverty is a result of the ways in which people are systematically denied resources. People excluded from the education system often experience social and economic exclusions after, which can deepen poverty and trauma.⁷

ALLFIE proposes to use the Anchor funding to catalyse system change around inclusive education. The funding would contribute to ALLFIE's core costs and enable it to create two new posts, an Events and Admin Officer and a Social Media Officer, and increase hours for existing staff members. The funding would enable ALLFIE to:

- Expand its capacity-building work supporting DPOs in London to campaign and work more effectively for inclusive education, looking at the links between segregated education, poverty and other forms of oppression. Capacity building allows the movement to campaign more effectively for inclusive education and to include the voices of all Disabled people, including children and young people. ALLFIE carries out capacity building to ensure the sustainability and survival of the inclusive education movement.
- Build relationships with non-disabled equity organisations in London to increase the number of organisations applying a disability lens to their work. For example, ALLFIE is currently working with the Runnymede Trust on a research project to help better understand the intersectional experiences of Disabled Black and racially minoritised children in mainstream schools.
- Grow its capacity to campaign around specific issues which intersect with the subject of inclusive education such as violence against Disabled people in care homes and segregated settings, and eligibility for free school meals for Disabled people who are not able to access education.
- Continue to identify and share examples of best practice for inclusive education and relevant research through its website, social media, external engagements and the Inclusion Now magazine. This provides vital resources for policy makers, decision makers and activists to enact change.

ALLFIE's proposal meets the criteria for Anchor Programme funding:

1. It is a user-led organisation – ALLFIE is a DPO. All Board members identify as Disabled and only one staff member is non-disabled.

⁴ *What evidence is there for the benefits of inclusive education for children without disabilities?* (2021): <https://www.disabilityevidence.org/questions-evidence/what-evidence-there-benefits-inclusive-education-children-without-disabilities>

⁵ *Special educational needs in England - Academic year 2022/23*: <https://explore-education-statistics.service.gov.uk/find-statistics/special-educational-needs-in-england>

⁶ *Now is the Time – A report by the CSJ Disability Commission* (2021): <https://www.centreforsocialjustice.org.uk/wp-content/uploads/2021/03/CSJJ8819-Disability-Report-190408.pdf>

⁷ Segregated Education: Linking poverty, class, race and disability: https://www.allfie.org.uk/news/inclusion-now/inclusion-now-64/segregated-education-linking-poverty-class-race-and-disability/#_ftn2

2. It provides second-tier support – ALLFIE provides capacity building support for London-based DPOs; provides spaces for organisations to network and build relationships; undertakes research and thought leadership; and ensures different perspectives reach decision makers through policy and advocacy work.
3. It is engaged in systems change work – ALLFIE has a strong track record of systems change work. Other than its capacity building work, it has worked with the UNCRPD to strengthen Disabled people’s rights and scrutinise UK policy and practice; it has worked with local and national politicians to influence government priorities and challenge barriers to Disabled people’s inclusion and participation; and it has built awareness and understanding through media appearances, public engagements and campaigns.
4. It is committed to equitable practice – ALLFIE is not only committed to equitable practice for Disabled people, it also works in an intersectional way, showing the diversity of Disabled people’s experiences. ALLFIE hosts a Disabled Black Lives Matter group which campaigns to address the inequalities experienced by of Black Disabled people and encourages other DPOs to embrace intersectional issues. ALLFIE has also led on supporting young people’s involvement within the Disabled people’s movement.
5. It works collaboratively with other organisations – ALLFIE is well-connected both in and out of the DPO sector. It often works in coalition with others, and helps resource other organisations to work effectively. Examples include collaborating with DPOs and organisations such as Disability Rights UK, Inclusion London, Disabled People’s Forum, and Reclaiming Our Futures Alliance on work including National Disability Strategy, reporting on the UNCRPD, and responding to the Coronavirus Act 2020. The Inclusion Now magazine is a collaboration with World of Inclusion and Inclusion Solutions.

London’s DPO Sector

DPOs in London have a proud track record of creating social change. Despite this, inequalities are worsening for the majority of Disabled people which has impacted the sector. Even before recent crises, the sector had been historically underfunded with many DPOs lacking funding to cover their full running costs, the costs of community and movement building, or the costs of necessary accessibility support. Further, DPOs are excluded from decision making processes. There is currently no effective engagement between the UK government and DPOs nor is there any central government financial support to enable DPOs to take part in engagement and coproduction – all governmental duties under the UNCRPD.⁸ Other issues DPOs face include little capacity to support current and future leaders, difficulty recruiting staff with lived experience, and limited capacity to reach young Disabled people.

Inclusion London shared a number of recommendations for strengthening London’s DPO sector. ALLFIE’s work fits with several of these recommendations:

- Building intergenerational links between Disabled people to empower young Disabled people and support them to become the next generation of leaders.

⁸ *Understanding the needs of Disabled people’s organisations in England* (2021): <https://www.inclusionlondon.org.uk/wp-content/uploads/2021/07/Understanding-the-needs-of-DDPOs-in-England-HQ.pdf>

- Supporting and developing the sector's intersectional skills and practice so DPOs in London can become more inclusive, anti-discriminatory and better reflect marginalised groups of Disabled people.
- Partnership working and alliance building with wider equality movements.
- Carrying out peer research to build a stronger evidence base on disability equality issues and needs of Disabled people and communities.
- Training and supporting DPOs in London on strategic communication, marketing and influencing skills/approaches.

Supporting ALLFIE's proposal could not only support system change around inclusive education, but also strengthen London's under-resourced DPO sector.

Financial Information

Year end as at 31 March	2022 Signed Accounts £	2023 Draft Accounts £	2024 Budget £
Income & expenditure:			
Income	102,804	147,405	310,825
Expenditure	(162,179)	(167,106)	(310,825)
Surplus/(deficit)	(59,375)	(19,701)	0
Reserves:			
Total restricted	49,926	25,625	25,625
Total unrestricted	99,680	104,280	104,280
Total reserves	149,606	129,905	129,905
Of which: free unrestricted	82,792	103,065	103,065
Reserves policy target	54,060	55,702	103,608
Free reserves over/(under) target	28,732	47,363	(543)

ALLFIE's income had shown a downward trend since 2019/20 but started to recover from 2022/23. The decrease in income was mainly due to changes in leadership, the impact of the pandemic and the start of some grants being delayed due to the longer onboarding period often required for Disabled staff. ALLFIE has now secured a number of multi-year grants from a range of funders, meaning the majority of its income is confirmed for 2023/24. Reserves are at a healthy level, predicted to be just under policy level (four to six months' expenditure) by the end of 2023/24. Long-term core funding from the Trust is not included in current projections and would strengthen ALLFIE's income and reserves position.

The funding recommended in year one of the grant could equate to over 50% of the organisation's annual income in 2023/24. The assessor has undertaken an assessment of the organisation's financial sustainability and is satisfied that there is a robust ongoing fundraising strategy in place.

Funding History

ID	Type	Meeting Date	Decision
20051	Anchor Programme – Resourcing Grant	06/03/2023	£3,600 to resource ALLFIE to participate in the advisory panel for City Bridge Trust's Anchor funding programme.
16237	COVID19 Small Charity Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £13,600, equivalent to one regular quarterly payment for the organisation's current grant.
15919	Bridging Divides	26/03/2020	£109,700 over two further and final years (£54,400; £55,300) towards an Inclusion Champion post (2.5 days per week), the Policy Co-ordinator (0.5 days per week) and a proportion of the Director's time (5 hours per week) and the

			Communications Officer (1 day per month), as well as the costs of developing the e-hub, and training and capacity building costs.
13663	Investing in Londoners	20/03/2017	£166,300 over three years (£55,900; £55,700; £54,700) towards an Inclusion Champion post (2.5 days per week), the Policy Co-ordinator (0.5 days per week) and a proportion of the Director's time (5 hours per week) and the Communications Officer (1 day per month), as well as the costs of developing the e hub, and training and capacity building costs.

The Recommendation

Funding is recommended as follows:

£1,500,000 over ten years (£150,000 per year) towards core costs to help ALLFIE challenge systemic barriers to inclusive education in London and support London's DPO sector.

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MEETING: 11/09/23

REF: 20345

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Consortium of Lesbian, Gay, Bisexual and Transgender Voluntary and Community Organisations	Adv: Nat Jordan
Amount requested: £1,407,820	Base: Outside London
Amount recommended: £1,408,400	Benefit: All London

Purpose of grant request:

Consortium LGBT (Consortium) (charity no. 1105502) will use core funding to sure up key strategic roles for the development of the lesbian, gay, bisexual and transgender (LGBT+) sector in London for the long term, enabling the retention of key talent, and the maintenance and growth of trusted relationships with LGBT+ sector organisations.

The Applicant

Consortium is a registered charity founded in 1998 and a national specialist infrastructure and membership organisation. Its objects are to promote the LGBT+ voluntary sector for the public benefit. It hosts the UK's largest network of LGBT+ organisations with over 580 members. It delivers direct and tailored one-to-one and group support to its members and brings together specialist networks to provide peer support and develop strategic action on agreed focus issues. Consortium also plays a key role as a resilient anchor organisation that can work in solidarity with and represent the sector, with a greater capacity for exposure to risk than more vulnerable smaller organisations, making it an effective channel for activities that work towards systems change, including those which are public facing.

Whilst the organisation's registered address is in Exeter, it operates without an office and all of its London team are based in London.

Background and detail of proposal

The funding requested includes the full-time salary and associated costs of two key strategic roles for London: a London Engagement Lead and London Development Officer.

The Lead, alongside the Head of Membership and Engagement, is responsible for the planning, co-ordination and delivery of the Consortium's work in London to ensure that member organisations in the region have access to a range of relevant support, resources and opportunities. The Officer provides direct support to the LGBT+ voluntary sector and will be responsible for the delivery of work that brings organisations together, including the practical delivery of an advisory board, leadership programme facilitation, and setting up other policy related events and summits.

Both roles work closely with colleagues with direct responsibility for developing work on racial justice and trans engagement (not included in this request) to ensure a continued intersectional focus across all of its work. Budget is also allocated within the requested funds to develop and maintain an advisory board that will be led by member organisations and will aim to be as representative as possible of the sector and the people that it supports, including both smaller and larger organisations. The exact objectives, size and shape of this group will be formed over the initial 18 months of funding, in recognition that its priorities and scope should be genuinely led by the sector. Where sector voice can sometimes lack unity of focus on specific issues, this advisory group will steer the focus of Consortium's work, levelling influence between larger organisations alongside smaller organisations working directly on intersectional issues. Funding will enable these organisations to be appropriately reimbursed for their engagement, as well as addressing access needs, to ensure limitations on capacity are addressed as far as is possible

A leadership development programme will also be overseen and developed by these roles and through this funding, which responds to skills and retention needs within the sector. It will build on previous work, including a trustee brokerage and mentoring service that was developed in partnership with Lloyds bank which saw 15 LGB staff of Lloyds become trustees of LGBT+ organisations in the UK and facilitated 12 mentoring and coaching relationships. Whilst the model saw positive outcomes in adding skills to sector leadership, Consortium identified the need to diversify the sources of talent (such that one organisation's members doesn't oversaturate the sector), and it saw an overrepresentation of cis white men in those taking up mentor roles. This is reflective of the makeup of senior leadership of LGBT organisations in the UK and in London (though London's gender representation is more balanced). With long term funding and continually developing relationships both within and outside of the LGBT+ sector, Consortium plan to develop a range of mentorship and support opportunities for LGBT+ leaders with greater support from a more diverse range of mentors in order to ensure that emerging leaders can access support from those with shared lived experience and relevant understanding for more effective relationships.

Consortium, itself led by and for LGBTQ+ people, has a strong track record of using its position relative to the wider sector, and harnessing the expertise and insights of its members, to influence change at systemic levels. It has been a key partner for CBT and other funders in this regard, acting as an equity partner alongside other key equity infrastructure bodies in the design and development of collaborative programmes such as the London Community Response, an emergency response to the Covid-19 pandemic, and currently the funder collaboration, Propel, where it advocates for the sector, providing intelligence and insight and influences the development of the programme to be more inclusive of LGBT organisations, and contributes to ongoing learning. This has already resulted in concrete developments in funder practice, including the prioritisation of funding for LGBT+ led organisations, and the better assessment of equitable practice. CBT, for example, improved its reach to LGBT organisations over the pandemic from 5% in earlier waves of funding, to 12 and 8% in Waves 4 and 5 (where a stricter definition of user led was applied).

The LGBTQIA+ Plan for London is an example of work that Consortium has driven with as systems change focus. It was able to take advantage of its role in relation to wider systems, including its relationship with the GLA, to develop a set of recommendations that align with the wider London recovery missions, and resulting in direct engagement from the GLA, facilitating direct conversation and connection between its member organisations and larger institutions that drive regional policy, where they may otherwise overlook the relevance of LGBT+ issues and specific needs of communities.

London's LGBT sector

Consortium's London membership has increased 89% from 109 to 206 between 2020 and 2023, and member organisations have reported increasing levels of demand on their services in that time.

LGBT+ communities experience complex and intersectional systemic inequalities which impact on individuals, communities and organisations. Developments in many areas of LGBT rights are historically recent, practically all within living memory, and as a result the sector is young and early in its development. Whilst there are a number of larger and more well-resourced LGBT organisations, most of the sector comprises smaller grassroots organisations. Of Consortium's members, 15% have no income, and nearly half an income of under £10,000 annually. By contrast, only 9% have an annual income of over £500,000.

LGBT+ organisations face challenges to accessing of funding due to prejudice and discrimination, and smaller organisations lack the power to influence decision making as it relates to cuts in public spending and the development of new funding programmes. Organisations are finding that their work is less popular amongst funders, and they therefore rely more highly on fundraising from the public. However, generating support from the public has its own challenges, with public complacency common due to misconceptions that equality for LGBT+ people has been achieved (for instance since marriage equality came into effect in 2014).

The issues facing LGBT communities in London (and more broadly in the UK) are evolving quickly. Due to limited capacity, LGBT community organisations continually find themselves in a reactive state to these issues. Recent examples of quickly emerging issues that the sector have needed to respond to have included changes to school policies as they relate to trans students, and evolving guidance from the Equality and Human Rights Commission on issues which affect trans communities, such as guidance on single sex services. Consortium's vision is that, with longer term funding and less risk to loss of staff in key roles, it will have the greater capacity to anticipate and plan for responses to emerging issues, rather than fire-fighting as they arise.

The capacity of Consortium's members to engage with its activities is limited due to a variety of factors. Staff turnover in the sector is high, in part because the increases in funding seen over the pandemic has been ending, while demand increases and the cost of delivering services rises. Anti-LGBT+ sentiment, and resulting abuse and hostility, has been rising, largely with the increasingly visible and polarised public

discussion on trans rights issues. This comes with an emotional toll on LGBT people in general, and particularly affects the staff and volunteers of organisations working closely on these issues whether at a strategic level or at the level of direct support of those experiencing resulting needs at the acute end.

Through building capacity and sustainability over a prolonged period Consortium will create the visibility and confidence for the sector to have a louder collective voice from a larger and more secure platform, resulting in greater understanding and impact.

Financial Information

Year end as at 31st March	2022	2023	2024
	Signed Accounts £	Management Accounts £	Budget £
Income & expenditure:			
Income	881,725	741,372	564,027
Expenditure	(531,745)	(1,119,218)	(766,687)
Surplus/(deficit)	349,980	(377,846)	(202,660)
Reserves:			
Total restricted	536,036	90,234	80,664
Total unrestricted	212,615	280,571	87,481
Total reserves	748,651	370,805	168,145
Of which: free unrestricted	205,960	273,916	80,826
Reserves policy target	60,828	80,549	86,164
Free reserves over/(under) target	145,132	193,367	(5,338)

Consortium's income primarily comprises restricted grant funding, with some unrestricted income from a combination of membership fees, donations, and earned income from training and consultancy activity.

Its reserves policy is to hold equivalent to four months of overheads (this increased from three to four in 2022/23). In the two most recently concluded financial years (2022 and 2023), free reserves held have been in surplus to this policy. Earned income levels during the pandemic were higher than anticipated, increasing from a relatively steady income level of around £500k a year prior to 2020. This influx of earned income has resulted in the retention of more unrestricted funding. Some of this is being spent on core staffing, with the creation of new roles (including a Head of Development and Partnerships and Comms Officer), but Consortium is taking a cautious approach to this to avoid the contraction of staffing levels further down the line. These roles provide more capacity to take on paid work to diversify sources of unrestricted income through promotion of the organisation's work and developing partnerships.

Consortium have, in the last few years, developed an onward grantmaking mechanism to deliver funding for LGBT communities. The receipt of these funds for onward disbursement has not followed an even annual cycle, resulting in higher income in some years, with funds carried forward for disbursement in later years. This peaked in the YE 2021 and has reduced annually in 2022 and 2023. No income has been forecast relating to onward grantmaking in the budget provided for 2024. This therefore contributes to reduced income and annual deficit in YE2023.

Consortium's budgeted income for 2024 is also relatively conservative: 63% of the forecast income is confirmed, and the majority of unconfirmed income relates to this proposal and one other to the National Lottery Community Fund. The budget does not include other opportunities for funding that Consortium consider more speculative, and this deficit is not expected to be realised in full.

Funding History

At the time of assessment Consortium has two live grants with CBT. Its current Bridging Divides grant (19337), due to conclude in 2026, also contributes to the cost of an FTE London Engagement Officer. While it shares a job title with one of the requested roles in this proposal, it is a separate role which acts as a key entry point for day to day support for member organisations providing practical one on one support. Consortium's Strategic Initiative currently contributes the London lead role, and two part time officer posts, that would be replaced by this funding as it concludes in December 2023. Consortium's involvement in the Propel programme as an equity partner is separately resourced by CBT through a grant to London Funders.

ID	Type	Meeting Date	Decision
19337	Bridging Divides – Connecting the Capital	05/12/2022	£226,900 over three years (£75,130; £75,360; £76,410) for 1 FTE London Engagement Officer, member engagement costs, networking and training event costs, accessibility costs and related project overheads.
19411	Anchor Programme - Resourcing Grant	20/06/2022	£3,450 to support participation in a design group co-creating City Bridge Trust's Anchor funding programme.
18727	Cornerstone Fund	30/09/2021	£25,000 towards the development of new, sustainable funding models and collaborations which will support equity-focused work across London.
18822	COVID19 London Community Response Fund (Wave 5)	14/07/2021	£2,500 to support increased reach for the London Community Response
18227	COVID19 London Community Response Fund (Wave 4)	28/01/2021	£9,840 to a hosted application on behalf of LesFlicks.
18229	COVID19 London Community Response Fund (Wave 4)	28/01/2021	£788 to a hosted application on behalf of Lambeth Links.
17734	Strategic Initiatives	17/09/2020	£290,000 over three years to research and meet the needs of the LGBT+ sector in London during and post the Covid-19 pandemic. The work will be delivered in partnership with HERO and will ensure specific support is provided to the Transgender sector.
17856	COVID19 London Community Response Fund (Wave 3)	17/09/2020	£10,000 LCRF grant for core operational costs to support increased reach by the London Community Response and to participate in wider recovery activities in the capital

16937	COVID19 London Community Response Fund	08/07/2020	£15,000 to support increased reach for the London Community Response in LGBTQ+ communities
16192	COVID19 Small Charity Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £15,000, equivalent to one regular quarterly payment for the organisation's current grant.
13987	Strategic Initiatives	15/06/2017	£217,000 over three years to create and manage an online directory/mapping tool of services in London and to provide capacity-building and general support to the LGBT third sector.

The Recommendation

£1,408,400 over ten years (£145,000; £126,100; £134,000; £136,500; £144,600; £141,700; £138,900; £147,200; £144,600; £149,800) of core funding towards core London team roles (2 FTE), resourcing member engagement in activities at a policy and strategic level, development and costs to participation in an advisory board and the development of LGBT sector leadership

MEETING: 11/09/23

REF: 20372

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Imkaan	Adv: Khadra Aden
Amount requested: £1,202,515.67	Base: Islington
Amount recommended: £1,202,900	Benefit: London Wide

Purpose of grant request: To support Imkaan's core functions through its policy, research, and advocacy work to challenge systemic issues in the violence against women and girls' sector.

The Applicant

Imkaan is a registered charity (number 1105976) based in London that works to address issues such as domestic abuse (DA), forced marriage and 'honour-based' violence across the UK. Its current model emerged from a joint initiative by Newham Asian Women's Project and Brent Asian Women's Resource Centre, and initially only provided support to refugees working with South Asian women. In 2004 the organisation broadened its reach as it evolved into a politically Black¹, anti-racist, social justice organisation working to support minoritised women and girls, i.e., women and girls which are defined in policy terms as Black and Minority Ethnic (BME).

Imkaan continues to provide second-tier capacity support to a membership of specialist frontline services that work to prevent, and respond to, violence against women and girls (VAWG). Membership is free of charge and member organisations, varying in size and capacity, provide a diverse range of services including refuge accommodation, housing and welfare advice, outreach, women-only spaces, health services, legal services, therapeutic services, and women's empowerment groups.

Background and detail of proposal

Imkaan has not received previous City Bridge Trust (CBT) funding, however one of their current funders, The Oak Foundation, has provided a reference that describes the organisation as a vital 'anchor partner,' which has delivered impactful work and research, and has provided the funder with useful insights into the most pressing issues facing the VAWG sector.

Although a national organisation, London is a major focus of Imkaan's work as the city with by far the greatest ethnic diversity in the country², and a place with a long history of Black and minoritised women developing 'by and for' services. Imkaan has a strong track record of working with London-based organisations across 17

¹ Political Blackness encompasses all women whose herstories originate from Africa, Asia, the Caribbean and Latin America, including the indigenous peoples of Australasia, the Americas and the islands of the Atlantic Indian and Pacific Oceans. <https://www.imkaan.org.uk/by-and-for>

² *Ethnic group, England, and Wales: Census 2021, Office for National Statistics (2021):* <https://www.ons.gov.uk/peoplepopulationandcommunity/culturalidentity/ethnicity/bulletins/ethnicgroupenglandandwales/census2021#:~:text=London%20remains%20the%20most%20ethnically,%2C%203.7%20million%20in%202011>

boroughs, including areas with high levels of deprivation such as Hackney, Lambeth, and Brent. It also works closely with statutory bodies to improve policy and practice responses to BME women and girls, such as the Greater London Authority (GLA), as well as mainstream organisations in the VAWG sector, such as Women's Aid.

During the height of the Covid-19 pandemic, which disproportionately impacted BME communities, member organisations were able to continue delivering vital services to BME women with the support of Imkaan. This support was particularly vital to women excluded from and unable to access universal support, particularly individuals with no recourse to public funds³ (NRPF) due to immigration controls. As well as providing capacity support to specialist services, Imkaan has undertaken vital research on the current funding arrangements and challenges facing BME led VAWG organisations in the UK. Imkaan's research has helped to create change in the funding and commissioning landscape, most recently highlighted in its evaluation of Comic Relief's 'Supporting and Sustaining Specialism Programme,' which provided important evidence of the crucial role played by BME led 'by and for' organisations. Imkaan's work and the research it has undertaken over the past few years has also had systemic impact on the policy landscape, as evidenced by its work drafting an Alternative Bill that influenced the governments Domestic Abuse Bill, now the Domestic Abuse Act 2021⁴.

Over the next decade Imkaan would like to use this CBT grant to build on its achievements to date and to ensure that those in positions of power in London will better understand the needs of BME women and girls when considering key policy and spending decisions in the VAWG sector. Imkaan is applying for core funding to provide long-term financial stability to its strategic aims by contributing to the salary costs of four senior roles (proportionate to London benefit): the Executive Director (0.2 FTE), Head of Advocacy (1 FTE), Head of Research & Evaluation (0.8 FTE), and Head of Membership, Training & Sustainability (0.8 FTE). By providing sustainability to these roles, Imkaan will strengthen its work on advocacy and influencing, policy analysis and development, research, networking, and capacity support to its members, bringing about systemic change.

London based organisations make up 40% of Imkaan's membership, and much of its work is focused on policy and influencing which, even when undertaken at a national level, impacts positively on London's BME women. The assessor is satisfied that this grant (which is covering 40% of some key salaries plus some other core costs such as staff training, impact, and evaluation etc.,) represents an amount proportionate to London benefit.

The funding will enable Imkaan to:

- Collect London-wide data on the abuse risks and experiences of BME women and girls to reveal trends on the most pressing issues. Data will be used to create evidence-based policy recommendations, which will be delivered to

³ Over a million people in the UK are affected by an immigration condition called 'No Recourse to Public Funds' (NRPF), which excludes them from accessing most state benefits and services, including Universal Credit, Child Benefit and social housing.

⁴ From the Margin to the Centre Addressing Violence Against Women and Girls Alternative Bill October (2018): https://829ef90d-0745-49b2-b404-cbea85f15fda.filesusr.com/ugd/2f475d_91a5eb3394374f24892ca1e1ebf2ee2e.pdf

leaders through strategic advocacy work including influencing, strategic communications, events, and strategic litigation

- Support its existing London frontline service delivery members to enhance their profiles and local influence as part of a cohesive movement-building initiative
- Imkaan will also increase its membership to become more visible and pertinent in all London boroughs and to better influence policy decisions related to abuse, community safety, equality, immigration, and other relevant areas in the capital
- Develop a new research, policy, leadership, and activism programme with and for young BME women and girls to increase diversity in the VAWG sector
- Dedicate time for organisational development work, moving away from being reactive to focusing on its strategy and sustainability, providing the organisation with increased capacity to reflect and plan, and to co-develop Imkaan's strategy with its members
- Resource Imkaan's Equity, Diversity, and Inclusion work as it continues to make the case for anti-racist approaches within the wider VAWG sector

Imkaan's proposal fits well with the criteria for the Anchor Programme:

- It is a user-led organisation with 100% of the staff, senior managers, and Board of Trustees from BME backgrounds
- As a second-tier organisation, Imkaan has over two decades experience of providing capacity support to over 67 BME frontline organisations
- Imkaan has a good track record of delivering work with the values of intersectional Black feminism working under a social justice and anti-racism, framework addressing wider structural inequalities, recognising how interlocking oppressions including age, class, caste, ethnicity, race, gender, sexual orientation, disability, and migrant status among others impact the lives of women and girls and create barriers to rights and resources for them
- Imkaan has a strong track record of delivering equitable practice, and deep understanding of systems change. It has also achieved change at a systemic level, most notably on the work it led which had an outcome on the Domestic Abuse Act 2021

London's VAWG sector

According to recent research, funding arrangements for VAWG support services are fragmented, complex, and difficult to understand⁵. Typically, organisations working in the sector rely on commissioning, trusts, and foundations for funding, which is often highly competitive. This in addition to a decade of austerity (resulting in diminished funding available for refuges), the covid pandemic, and increases in the cost of living, means the sector is now in crisis mode. This picture is even more dire for specialised 'by and for' organisations supporting BME women and girls.

Alongside being survivors and victims of domestic or sexual abuse, BME women and girls are also often survivors or victims of racist abuse that they have endured from

⁵ Funding for Support Services for Victims and Survivors of Violence Against Women and Girls in London: <https://www.londoncouncils.gov.uk/our-key-themes/crime-and-public-protection/sexual-and-domestic-violence-including-vawg/funding>

individuals, groups, and systems across society. Generic and statutory-led models of support provision are found to be less effective for BME women and girls subjected to complex and intersecting forms of harm. BME women are more likely to disclose and feel safe with specialist organisations where they may feel better understood and heard without discrimination. The Domestic Abuse Commissioner's Office (DAC) found that 78% of BME survivors felt safer accessing support from 'by and for' service providers⁶. As part of its work on systems change, Imkaan has delivered training sessions to overcome this challenge and has worked with a broad cross-section of funders, as well as practitioners in voluntary and statutory organisations, to better understand the effects of domestic violence on BME women and girls.

Financial Information

Year end as at 31 March	2022 Signed Accounts £	2023 Draft £	2024 Budget £
Income & expenditure:			
Income	2,156,146	2,064,548	965,847
Expenditure	(1,004,294)	(2,080,455)	(965,847)
Surplus/(deficit)	1,151,852	(15,907)	0
Reserves:			
Total restricted	1,099,920	1,140,236	1,140,236
Total unrestricted	556,773	500,550	500,550
Total reserves	1,656,693	1,640,786	1,640,786
Of which: free unrestricted	535,160	478,937	478,937
Reserves policy target	489,338	489,338	489,338
Free reserves over/(under) target	45,822	(10,401)	(10,401)

Imkaan's income has shown a steady increase since 2018, with a drop in income and expenditure reported in 2019/20. This drop was due to a truncated financial year as the charity moved its end of financial year from September to March. A review of the charity's most recent accounts (for year ending March 2022) shows the organisation to be in good financial position. For year-end 2021/22, the organisation's free reserves stood at £535,160, slightly exceeding the free reserves target to hold between £244,669 and £489,338 (equivalent to three to six months' expenditure).

The anticipated decrease in income in 2023/24 relates to the end of Imkaan's onward grantmaking through the Tampon Tax, on behalf of Comic Relief and the Department for Digital, Culture, Media, and Sport (DCMS). The reduced income is also due to the charity ceasing its role as the fiscal host of the Tallawah Project⁷ on behalf of the Oak Foundation. Despite this drop in income there is confidence in the financial viability of the organisation.

Funding History

None.

⁶ A Patchwork of Provision, Domestic Abuse Commissioner (2022): https://domesticabusecommissioner.uk/wp-content/uploads/2022/11/DAC_Mapping-Abuse-Suvivors_Summary-Report_Nov-2022_FA.pdf

⁷ <https://www.projecttallahawah.org/>

The Recommendation

£1,202,900 over ten years (£106,200; £109,100; £112,100; £115,100; £118,300; £121,500; £124,900; £128,300; £131,900; £135,500) towards Imkaan's core costs to support its policy, research, and advocacy work to challenge systemic issues in the violence against women and girls' sector.

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MEETING: 11/09/2023

REF: 20424

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Organisation name: Spectra CIC	Adv: Dion Holley
Amount requested: £1,002,612	Base: Kensington and Chelsea
Amount recommended: £1,003,000	Benefit: London-wide

Purpose of grant request: Spectra CIC will use core funding to build capacity in the trans and sex worker sector.

The Applicant

Spectra CIC (no. 07975254) was established in 1996 as the West London's Gay Men's Project. Commissioned by the London Borough of Hounslow, its services specifically focused on providing sexual health and HIV support to men who have sex with men (MSM) populations in West London. Overtime, the applicant extended its reach to the wider LGB population to meet the needs of the sector. In 2012, the applicant set up as Spectra CIC to reflect changes in provision and the need for greater community engagement. In light of developments in the trans sector, Spectra CIC has since shifted its focus in 2014 to support transgender (trans) communities and now sex worker communities in and around London.

Trans is an umbrella term used to describe people whose gender identity does not match with the sex they were assigned at birth. This includes (but not limited to) transgender, transsexual, gender-queer (GQ), gender-fluid, non-binary, gender-variant, crossdresser, genderless, agender, nongender, third gender, bi-gender, trans man, trans woman, trans masculine, trans feminine and neutrois. In addition, Sex Work is an umbrella term that describes someone who provides a sexual service to a client or observer for money or other forms of economic value. This includes (but is not exhaustive to) Porn Performance, Webcam, Trade Sex, Street-based Sex and Erotic Dancing.

Background and detail of proposal

The applicant has previously received funding from the CBT and currently holds a Cornerstone grant to further the development and delivery of services through its Trans Learning Partnership (TLP). The partnership has co-designed and delivered on its aim to research, collect data and advocate for trans communities by producing a 10,000-word report that responds to 'phase 1' of the NHS consultation on gender affirming care for Children and Young People (CYP). This work, alongside other activities, has enabled the TLP to successfully advocate for the right of trans people and reduce existing barriers and inequalities to accessing healthcare. Through the TLP and its activities, Spectra CIC has learned the importance of mutual knowledge sharing, with stakeholders expressing further interest in a central resource hub for trans communities. It believes this approach will be vital for creating systemic change within the community by convening online research and resources into one place. In addition, the TLP has learned that capacity building is essential for its strategic

positioning, ensuring all staff have the skills to produce stronger pieces of work. In turn, this will create better long-term stability for the TLP and the sector.

This organisation is highly committed to amplifying the diverse voices and experiences of trans and sex worker communities. For example, it is currently reviewing a 'Needs Assessment' report carried out for Southwest London's Sex Worker Support Services (SWS). By doing this, it was able to demonstrate the inadequacy of the report and the data it uses, while working with sex worker organisations to establish an accurate reflection of the issues and scope of sex work. Similarly, the charity has represented the needs of trans people by facilitating workshops for health professionals. This enables health professionals to understand the experiences of trans people accessing healthcare and thus encourage greater trans inclusivity within its services. In addition, Spectra CIC has made significant steps to platform the diverse voices of trans people of colour (TPOC). For instance, it has developed a 'Levelling the Field' project that provides safe spaces for TPOC to meet, share experiences and provide the TLP with non-extractive data to collect and use. Spectra CIC is committed to sustaining equity and systemic change in its operating sectors.

Core funding will support two new part-time posts; a sustainability Fundraiser (SW focused) and a Sex Worker Strategic Lead. These roles will help Spectra to create and manage the Sex Work Coalition and support fundraising for it. Additionally, funding will contribute to three existing part-time posts and the CEO salary who will oversee the core work of Spectra CIC and its internal and external relationships. Lastly, a training, participation and learning budget has been included. Funding will enable Spectra CIC to:

- Develop a sustainability plan that not only re-focuses the strategic approach of the TLP, but also builds the necessary foundations for it to become its own independent charitable organisation.
- Collaborate on a new sex worker coalition and SW advisory group that will co-design work and address the systemic barriers faced by sex worker communities.
- Collect robust/peer led data into sex worker communities since current data is inaccurate and unrepresentative of the diverse nature of this sector.
- Build new relationships with SWS and organisations/groups to ensure the coalition is representative of the sector.
- Upskill and empower trans and sex worker communities by providing learning and development opportunities to gain new skills and knowledge.
- Create paid safe spaces for trans and sex worker communities to share experiences, which will lead to better community and sector outcomes.

Spectra CIC meets the criteria for Anchor Programme Funding:

1. It provides second tier support, utilising an incubator model. This is a peer led approach whereby services are designed by people with lived experience. It strengthens autonomy and agency within the sector by allowing service users and front-line organisations to inform the work.
2. Spectra CIC is a user-led organisation. There are 12 LGBTQ+ members in SMT, 8 of which are trans.

3. It encourages collaborations within the sector, for example it has successfully worked within the TLP and the GMI Partnership, both previously funded by CBT. Coalition building is important for building a collective voice within the communities and the sector. Spectra has held focus groups with front-line sex worker groups, such as the Sex Worker and Resistance Movement (SWARM), who have shown an interest in a sex worker coalition.
4. It takes an intersectional approach to its work. For example, it understands the intersections between trans and sex worker communities with many trans people doing sex work to pay for gender affirming care.

London's Sex Worker and Trans sector

It is important to recognise that the systemic issues within sex worker and trans sector overlap in various ways, particularly where these identities intersect.

London's Sex Worker Sector:

Data on London's sex workers is vastly limited and not representative of the diverse communities and types of sex work. Most research focuses on street-based sex work, which is a systemic problem in and of itself. Sex worker communities face many challenges, particularly access to sex related healthcare (SRH). Research has demonstrated that 33% of sex workers do not know their HIV status. Furthermore, female sex workers are 30 times more likely to contract HIV. Access to SRH is vital, even so, sex workers avoid healthcare services due to fear of exposure. If you are visible as a sex worker, it is much harder to secure employment or housing, which are basic human rights. This has influenced the issue of homelessness and poverty amongst sex workers. Moreover, there is a high population of MSM and trans sex workers in London who are disproportionately affected stigma and discrimination. These groups experience high risk of violence. With few MSM and trans specific SRH services, different sex worker communities will continue to have poor health as they rely on informal measures.

London's Trans Sector

With the rise of anti-trans rhetoric and gender critical views, the trans sector has become a hostile and volatile environment for trans people and TPOC. Gender critical proponents believe that sex is immutable and should not be conflated with gender identity. The negative spotlight on trans visibility has made trans people the most targeted group in the LGBTQ+ community. For example, a report from Stonewall shows that 41% of trans people and 31% of non-binary people have experienced hate crime because of their gender identity. Another report written by Galop shows that 8% of trans respondents have experienced physical assault compared to 1.9% of the public. The data is clear – trans people are at risk and in need of safe spaces more than ever.

In addition to violence, trans people like sex workers, face a range of systemic issues, such as poor access to healthcare, which can inhibit their ability to thrive in society. Stonewall's 2017 report on trans people's experiences show that 41% of respondents felt that health providers did not understand their trans specific needs. Furthermore, 24% of trans people faced discrimination from healthcare providers, with at least 7% being refused care. Access to healthcare is important for gender

affirmation, so the lack of care being provided is a systemic issue that needs to be resolved.

Financial Information

Spectra CIC continues to maintain a stable income and ability to generate surplus year on year. In addition, the applicants spending matches its secured level of income. 97% of budgeted income for 2023/24 has been secured and 76% for 2024/25. This anchor request has not been included within its confirmed funding. The list of funders Spectra CIC has secured funding from includes Esmée Fairbairn, CBT, The Henry Smith Foundation and Children in Need. Spectra CIC are currently waiting for outcomes from trusts and foundations such as the National Lottery Fund, Lululemon and the Clock workers' Foundation for its income for 2024/25.

Spectra CIC's board have agreed to operate at a reserves policy based on a minimum of three months operating costs. This cost equates to 385k, taking the applicant over its reserves target. Additionally, its forecasted free reserves for 2023/24 and 2024/25 are expected to be exceed its target reserve policy. Even though there is no obligation for this CIC to have a reserves policy, it has chosen to hold a level of funds to cover unexpected/planned costs, such as staff redundancies. It also acts as a buffer against funding and contract loss, which is important for sustaining services, cash flow and core function in a volatile sector.

Year end as at 31 March	2023	2024	2025
	Signed accounts	Forecast/ Management	Budget
	£	accounts	£
	£	£	£
Income & expenditure:			
Income	1,593,639	1,829,786	1,867,280
- % of Income confirmed as at	100%	97%	76%
Expenditure	(1,540,998)	(1,801,385)	(1,801,739)
Total profit/(loss)	52,641	28,401	65,541
Balance sheet:			
Net assets/(liabilities)	310,213	338,614	404,155
<i>Of which:</i>			
Income & Expenditure reserves	310,213	338,614	404,155
Total reserves	310,213	338,614	404,155
Months' expenditure covered by I&E reserves	2.440	2.256	2.692

Funding History

ID	Type	Amount	Meeting Date	Decision
19380	Anchor Programme Developmental Grant	£3,000	20/06/22	to be involved in the design group of the anchor programme, contributing to elements such as the application process, eligibility criteria, reporting requirements and what the vision and goal of the programme should be.
19072	Bridging Divides - Cornerstone	£498,000	09/03/22	Cornerstone funding to support the critical next steps for the Trans Learning Partnership: to develop a robust evidence base through trans community-led research; to inform policy and systemic change; and

				address stark inequalities faced by the trans community.
19067	Bridging Divides – Strategic Initiatives	£36,700	09/03/22	Bridge funding to support the infrastructure and participatory costs of the Trans Learning Partnership while awaiting the outcome of a Stage 2 Cornerstone bid
18635	COVID19 LCRF (Wave 5)	£49,915	30/04/22	A one-off, unrestricted grant equivalent to one regular quarterly payment for the organisation's current grant. COVID19
17227	COVID19 LCRF (Wave 2)	£15,265	08/07/20	A one-off, unrestricted grant equivalent to one regular quarterly payment for the organisation's current grant. COVID19

The Recommendation

£1,003,000 over seven years (£135,300, £138,000, £140,700, £143,600, £146,400, £149,400, £149,600) to support core costs and build capacity in the trans and sex worker sector through second-tier collaboration and capacity building.

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MEETING: 11/09/2023

REF: 20511

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

The Interlink Foundation	Adv: Clara Espinosa
Amount requested: £1,421,586	Base: Hackney
Amount recommended: £1,283,370	Benefit: Hackney, Haringey and Barnet

Purpose of grant request: To support the organisation's core functions through its policy, research and community voice work to address systemic barriers to the Orthodox Jewish community accessing key services.

The Applicant

Established in 1990, Interlink Foundation (IF) is a London based membership infrastructure registered charity (no. 1079311) serving the Orthodox Jewish (Charedi) voluntary and community sector. It supports over 200 Charedi community organisations mainly based in Hackney, Barnet and Haringey with a small percentage based in Manchester and Gateshead. The charity supports organisations to narrow the gaps in poverty, health care provision, education and housing. Its main activities involve providing capacity building support such as governance, finance and offering an organisational health check to ensure good practice. It facilitates funding partnerships between voluntary organisations and the public sector to strengthen the community's voice. It engages in research and policy work as well as providing social incubation of new projects that address unmet needs and gaps in services.

Background and detail of proposal

IF has been instrumental in enabling the Charedi voluntary sector to collaborate with the wider voluntary sector to meet the needs of members of its own community and beyond. It currently holds a Bridging Divides (BD) grant, which is due to end in November 2024, towards the salary of a Development Officer. The aim is for Charedi organisations to work outside their own community, in partnership with the wider voluntary sector and the public sector. Some achievements so far include supporting 32 new London organisations with capacity support and the Orthodox Jewish Wellbeing and Mental Health in Schools (WAMHS) pilot where IF was able to link a local youth charity with CAMHS (Child and Adolescent Mental Health Services).

The Charedi community is a racial and religious minority that has a long-standing history in London since the 20th Century. The inherited and intergenerational trauma linked to years of persecution has created an inherent fear of authority and the community is set up to look after its own. To date, there are roughly 30,000 Charedi

Jews living in London and it is the fastest growing community in Europe, growing at a rate of 4% annually.¹

The current structures associated to existing policies, the lack of culturally sensitive services and the misrepresentation created by the media are marginalising and excluding this community. Although IF recognises the importance of forming partnerships outside of the Charedi community (which is what the current BD grant is helping to do) it wishes to use the anchor fund to address the root causes of inequity and to bring about systemic change.

The funding will contribute to IF's core costs and ensure the sustainability of two key roles in the organisation; a part-time Policy Officer (0.7 FTE) and a contribution to the CEO's salary (proportionate to the London benefit). The funding will enable IF to:

- Revive its strategy groups, these are meetings and networks that bring together key Voluntary and Community Sector (VCS) groups and statutory partners to coproduce solutions together that lead to positive structural change and more equitable outcomes for the community. The strategy groups are organised around themes whether that's children, maternity services or adult services and are place based around Hackney, Haringey and Barnet. This creates a platform for organisations to speak directly to those who have the power to influence change and to identify gaps in service provision.
- Engage in research, policy and advocacy work with member organisations to effect policy changes and practices that address inequities in services for Charedi Londoners. This is in line with its strategic goal to work on issues of importance to the Orthodox Jewish community such as children having equal access to therapeutic services and ensuring that public authorities honour the public sector quality duty by taking action to mitigate inequalities that exist in minority ethnic communities.² IF has plans to assist on a demographic piece of research to ensure that the population is counted accurately as the Charedi community were undercounted in the most recent census.³
- Address the increase of hate crime and hostility by raising awareness and understanding through the facilitation of community visits. These visits will be co-produced with community groups and will allow commissioners and policy makers to meet the organisations working on the ground, to get a deeper understanding as to what the issues are.
- Deliver cultural training for key connectors (such as civil servants and politicians) and to give a voice to the community through the Pinter Trust, founded by IF to tell the story of the UK Charedi community in its own words. The trust aims to train people to be ambassadors and to upskill community lay

¹ Institute of Jewish Policy research. (2022) Haredi Jews around the world: Population trends and estimates. Available at: <https://www.jpr.org.uk/reports/haredi-jews-around-world-population-trends-and-estimates>

² Public authorities must show consideration as to whether they *should* take action to meet these needs or reduce the inequalities for those with protected characteristics however it does not oblige them to take action to mitigate the inequalities.

³ Institute of Jewish Policy Research. (2023) Assessment of the 2021 Census data on Haredi (Strictly Orthodox) Jewish children in England. Available at: <https://www.jpr.org.uk/reports/assessment-2021-census-data-haredi-strictly-orthodox-jewish-children-england>

leaders in social media and media skills to help Charedi voices cross the digital divide.

- Reignite partnerships with racial justice organisations and wider knowledge sharing. IF was involved with HEAR Equality in its initial stages and Council of Ethnic Minority Voluntary Sector Organisations (CEMVO). As workload and demand increased, IF lost capacity to work on those partnerships and the community voice got sidelined. This funding will allow IF to strengthen partnerships with equity-led organisations and the Greater London Authority (GLA), recognising that it takes time and resources to build those relationships.

Core funding will allow IF to focus on activities such as insight gathering, information sharing and addressing systemic racism. It is led by and for the community and organisations it supports as all staff team and Board of Trustees are from the Charedi community and have a unique understanding of the communities' cultural norms. IF's board members are elected annually through a postal ballot by its membership organisations. It is committed to equitable practice; the organisations and communities it supports designs its services and goals emerge where members are driving them. Similarly, the charity supports communities that address intersecting identities; disability, maternity and age feature prominently in its membership. IF is one of London's key infrastructure organisations; it recognises its role to give voice to the issues that its member organisations are experiencing and to facilitate partnerships.

IF has a positive track record of influencing policy and bringing about systemic change. For example, when the two-child benefit cap was introduced, IF partnered with Child Poverty Action Group (CPAG) to give evidence as to the impact that this policy would have on Charedi families. Similarly, IF supported Children Ahead, a charity that supports children with learning difficulties, to influence public sector policy by getting Hackney Clinical Commissioning Group to recognise its duty of care to all children in the borough and to commission a pilot of developmental therapy and mental health services for Charedi children.

It works collaboratively and has established strong partnerships between Charedi community groups and mainstream organisations, such as London Youth, National Council for Voluntary Youth Services, and Age UK, amongst others. It currently works closely with borough-based consortia bidding vehicles in Hackney and Haringey.

London's Orthodox Jewish sector

The faith sector is impacted by different policies and is rarely considered in the bigger picture or consulted on issues not directly relating to faith. There is a need for government to understand the complexities of community involvement and integration of faith groups in society.⁴ Faith communities can play a key role in

⁴ The Bloom Review. (2023) Does government 'do God?': An independent review into how government engages with faith. Available at:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1152684/The_Bloom_Review.pdf

promoting the overall wellbeing of society and addressing systemic issues across communities. However, there is historic underinvestment in organisations working with minoritised communities and funding is often harder to secure.⁵

The Orthodox Jewish charity sector is overstretched. As the community has grown, so have the needs especially around youth provision, services for disabled children and adults, and support for emotional and mental health. The Charedi community is disproportionately impacted by the cost-of-living crisis; the cost of kosher food is four times the inflation rate for non-kosher food.⁶ Even where there are universal mainstream services that are in principle open to all, there are significant cultural barriers that result in Charedi children and families not accessing statutory services. For example, in Hackney, 30% of children are Charedi, but approximately 95% of commissioned services do not reach them.

IF embraces complexity and adapts to changing needs. In the past, IF would not have described itself as an organisation that challenges antisemitism however it has recognised that the community needs a voice, and it is becoming further ostracized due to the lack of understanding and awareness in broader society.

Financial Information

Year end as at 31st March	2022 Signed Accounts £	2023 Draft Accounts £	2024 Budget £
Income & expenditure:			
Income	1,029,553	916,717	890,910
Expenditure	(1,124,061)	(987,606)	(873,709)
Surplus/(deficit)	(94,508)	(70,889)	17,201
Reserves:			
Total restricted	0	0	0
Total unrestricted	414,448	343,559	360,760
Total reserves	414,448	343,559	360,760
Of which: free unrestricted	407,959	325,767	342,968
Reserves policy target	151,791	120,822	142,581
Free reserves over/(under) target	256,168	204,946	200,387

IF has a diverse income stream made up of donations, income from services to other organisations and consortium-based contracts which makes up 50% of its income. It is in a positive financial position with free unrestricted reserves of £407,959 equating to eight months of free reserves which is within its target of three to twelve months of running costs. The charity experienced a deficit in 2021/22 due to Covid funding ending and due to a previously owned IF project, Chinuch UK, becoming a separate charity which meant IF lost some of its income. Whilst this was partially offset by reduced project expenditure, core costs could no longer be shared across this project.

⁵ Civil Society. (2022) Faith charities report facing additional barriers to grant funding. Available at: <https://www.civilsociety.co.uk/news/faith-charities-report-facing-additional-barriers-to-grant-funding.html>

⁶ The Jewish Chronicle. (2022) Jewish children going to bed hungry in kosher cost of living crisis. Available at: <https://www.thejc.com/news/news/jewish-children-going-to-bed-hungry-in-kosher-cost-of-living-crisis-4FCckFZ76BNLT5d11POR4K>

The charity is holding higher than expected reserves as it had to decrease expenditure in 2021/22 and 2022/23 to manage the deficits; this involved reducing the staff team however in the following years it has plans to expand the team which will bring the free reserves level down. Additionally, IF maintains high reserves and cash level to cover the core costs that are not supported by project-based funding and to mitigate funding that is received retrospectively from a project being carried out. For 2023/24, it is expecting a small surplus and has secured 71% of its income.

Funding History

ID	Type	Meeting Date	Decision
15169	Bridging Divides	30/10/2019	£250,000 over five years (5 x £50,000) towards the salary of a FTE Development Officer and related running costs of a project supporting capacity building, and resilience amongst Charedi organisations.
12917	Investing in Londoners	26/11/2015	£80,000 over two years (2 x £40,000) towards the salary and related running costs of a project supporting partnership and collaboration amongst Charedi organisations in North London.
11055	Working with Londoners	26/04/2012	£120,000 over three years (3 x £40,000) towards the salary and associated running costs of a project developing partnerships between Charedi community groups and mainstream organisations which tackle disadvantage and create opportunities for everyone.
9149	Working with Londoners	22/01/2009	£80,000 over two years (2 X £40,000) towards the salary and related running costs of two part-time Development officers to support Orthodox Jewish community organisations improve their organisational and management skills.

The Recommendation

Recommended amount has decreased to ensure the contribution towards the CEO's salary is proportional to the charity's London benefit.

£1,283,370 over ten years (£138,000; £122,610; £121,340; £118,200; £122,200; £128,340; £130,620; £132,520; £134,520; £135,020) of core funding to address the systemic barriers to the Orthodox Jewish community accessing key services.

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MEETING: 11/09/23

REF: 20422

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

The Ubele Initiative	Adv: Khadra Aden
Amount requested: £ 1,048,132.75	Base: Haringey/Lambeth
Amount recommended: £1,048,500	Benefit: London-wide

Purpose of grant request: To develop a ‘financial centre of excellence’ supporting Black and minority-led organisations to strengthen their financial literacy and governance, and to overcome systemic barriers in the voluntary sector.

The Applicant

The Ubele Initiative (TUI) was formed in 2014 as a Company Limited by Guarantee and converted to a Community Interest Company (no. 09035399) in January 2023. It is an African diaspora led infrastructure organisation working in the UK and abroad. TUI’s stated vision is to support and empower Black and Racially Minoritised (BRM) communities to act as catalysts for social change, working with community leaders, groups, and organisations to strengthen their sustainability, resilience, and voice. It has established a network of BRM led organisations giving access to community spaces, social leadership programmes, skills development, and peer learning. TUI also facilitates intergenerational collaboration, partnership working, project development, and creates space for young emerging leaders.

TUI influences policymakers and undertakes research to develop local, regional, and national practice. It is the primary African diaspora voluntary organisation leading such work in the UK with strategic national partnerships with, for example, Power to Change, The Social Investment Business, Access Foundation and Locality. It was asked to take on the BRM communities infrastructure lead role for the Greater London Authority (GLA) in February 2020, the focus of which soon expanded to include COVID-19 (C19) support. TUI also became a national lead for The National Lottery Community Fund’s (NLCF) C19 programme focused on BRM communities, alongside partner Global Fund for Children. TUI is also currently an Equity Partner for City Bridge Trust (CBT) and London Funders’ collaborative Propel Funding Programme.

Background and detail of proposal

BRM led organisations often face systemic racism, underfunding and discrimination that inhibit their ability to thrive and deliver quality services that meet the needs of Black and minoritised communities. However, at the height of the global pandemic in 2020, followed by the Black Lives Matter uprisings, funders worked to redress this issue as the sector started to engage with questions of racial inequity in the voluntary sector. TUI was at the forefront of these conversations and used its own experience of underfunding, as well as its role supporting frontline BRM organisations, to advocate for a change to the way funding is distributed. This led to TUI being commissioned as the delivery partner of The Phoenix Fund, a joint initiative established in May 2020 between Global Fund for Children and The National Lottery Community Fund, to provide £1 million in emergency grants to BRM communities across England.

As the C19 pandemic progressed, TUI continued to support the most marginalised communities, reaching a total 17,622 people and providing support to 200 BRM led organisations between April 2020 and July 2021. The organisation continued to provide onward grantmaking during this period and distributed £13.5 million to BRM led community and voluntary organisations, and social enterprises. TUI also raised £94,925 for the Majonzi Fund to provide bereavement and grief support to members of Black and minoritised communities affected by loss due to C19¹. Building on this work, TUI seeks to find sustainable and systemic solutions to persistent social and economic challenges faced by minoritised communities and the ‘led by and for’ frontline organisations that support them.

Following its conversion into a Community Interest Company (CIC), TUI has been mindful of managing its rapid growth and has recently secured funding from The Clothworkers Foundation to recruit an experienced Chief Finance Officer. This role will develop TUI’s existing second-tier financial support aimed at BRM voluntary organisations, currently led by one staff member, and will also oversee the organisation’s own internal financial management and governance. It is anticipated that the recruitment for this role will be finalised by the end of October 2023.

TUI proposes to use the Anchor grant to further increase its staff capacity by recruiting a Deputy Finance Director (1 FTE) and Finance Officer (1 FTE), both reporting directly to the Chief Finance Officer, to enable TUI to help build a resilient future for BRM led organisations.

TUI will do this by:

- Setting up a ‘financial centre of excellence,’ providing infrastructure support to organisations in eight London boroughs (Lambeth, Southwark, Lewisham, Greenwich, Haringey, Hackney, Brent and Enfield)
- Recruiting a Deputy Finance Director and Finance Officer to focus on increasing BRM groups’ financial literacy, confidence, skills, and resilience in accessing and managing levels of resourcing required to address deep-rooted racial injustice. Both postholders will spend 80% of their time delivering this work, and the remaining 20% of their time strengthening TUI’s own internal financial management and governance
- Support will also include financial health checks, finance strategy development, risk identification and management, budgeting, statutory/funder compliance training, employer responsibilities training, governance training, as well as advice on how to adhere to best practice when publishing annual financial reports
- The organisation will also develop an evaluation system that will track individual and organisational confidence and skill levels once they have received support from the charity

TUI’s proposal fits the criteria for the Anchor Programme:

- It is a ‘led by and for’ organisation with the majority of its staff, as well as 100% of senior managers and Directors, from BRM backgrounds
- As a second-tier organisation, TUI has a strong track record of providing capacity support to BRM frontline organisations across London

¹ *Social Impact Report: Making a difference within challenging times* (2021): <https://www.ubele.org/assets/documents/Ubele-Social-Impact-Report,-2020-21.pdf>

- TUI delivers its work through an intersectional approach so that those with additional protected characteristics, such as gender, sexuality and disability, are not further marginalised. This is best demonstrated by TUI's multiple projects, such as its work with LGBTQIA+ youth through the Bayo project
- TUI's strategic objectives aim to embed equity and justice across its work with marginalised communities, frontline organisations, as well as its work influencing funders, and voluntary and statutory bodies. This is evidenced by TUI's research, such as their Booska report which exposes structural racism in the voluntary, community and social enterprise (VCSE) sector

London's BRM voluntary and community sector

The BRM voluntary and community sector (VCS) has a long history in the UK, dating back to the Windrush generation of the 1950's. Newcomers set up diaspora groups, supplementary schools, advice clinics and other services geared to meeting the needs of communities who were badly served by mainstream public authorities, if at all. In more recent times, BRM led organisations continue to exist because the groups they support are still inadequately served by mainstream VCS organisations.

TUI's 2020 report *Impact of COVID-19 on Black, Asian and Minority Ethnic (BAME) community and voluntary organisations*², found that nine in ten Black-led organisations were at risk of closing due to the disruptions caused by C19 and historic underfunding of organisations led by marginalised groups. Although the pandemic forced mainstream funders to reconsider their support of BRM led organisations, with an increase in funding due to the higher impact of covid on BRM communities, a lot of these organisations have reported that they now face a cliff edge with Covid emergency funding coming to an end. This issue has been further exacerbated by increasing demand from marginalised communities most impacted by the cost-of-living crisis.

Financial Information

Year end as at 31 March	2022 Signed accounts £	2023 Draft accounts £	2024 Budget £
Income & expenditure:			
Income	1,645,645	2,723,260	3,015,438
- % of Income confirmed as at	100%	100%	100%
Expenditure	(1,562,542)	(2,723,260)	(3,015,438)
Total profit/(loss)	83,103	0	0
Balance sheet:			
Net assets/(liabilities)	112,697	112,697	112,697
<i>Of which:</i>			
Income & Expenditure reserves	112,697	112,697	112,697
Total reserves	112,697	112,697	112,697
Months' expenditure covered by I&E reserves	0.865	0.497	0.448

TUI's funding comes from a range of sources, such as local authority commissioning and grants from trusts and foundations. TUI chooses to be audited and for its

² Impact of COVID-19 on BAME community and voluntary organisations (2020):
<https://www.ubele.org/assets/documents/REPORT-Impact-of-COVID-19-on-the-BAME-Community-and-voluntary-sector,-30-April-2020.pdf>

financial reporting to follow charity accounting presentation on splitting income between restricted and unrestricted funds, to better disclose its varied income. However, as a company, it complies with company rules on deferring grant income. TUI's most recent published accounts for year-ending 2022, shows the organisation to be in a good financial position, with a healthy cash balance reported (£800k) and positive direction of travel with increased income projected in 2022/23 and 2023/24. The 2023/24 budget does not include income coming from the Anchor programme.

Funding History

ID	Type	Meeting Date	Decision
20003	Propel	31/03/2023	£1,216,600 over three years for 12 part-time (7.2 FTE) staff and associated costs across three partners to contribute to a Community Wealth Building programme in Haringey, Lambeth, and Lewisham
18821	COVID19 London Community Response Fund (Wave 5)	14/07/2021	£1,000.00 to ensure the London Community Response increases its reach
17932	COVID19 LCRF (Wave 3)	26/11/2020	£33,660 towards the costs of a Project Manager's salary and a contribution to core costs
17817	COVID19 LCRF (Wave 3)	17/09/2020	£11,478 to create a new Lewisham BAME Infrastructure/Funding Hub
17854	COVID19 LCRF (Wave 3)	17/09/2020	£10,000 for core operational costs to support you to ensure the London Community Response increases its reach and to participate in wider recovery activities in the capital
16939	COVID19 Small Charity Emergency Support Funding	08/07/2020	£30,000 to ensure that London Community Response increases its reach in BAME communities
17330	COVID19 LCRF	08/07/2020	£46,977 towards the costs outlined in your application.
17331	COVID19 LCRF	08/07/2020	£21,464 towards the costs outlined in your application.

At the time of assessment TUI has one active Propel grant with CBT. The grant (20003) is due to conclude in 2026 and contributes to the cost of staff salaries (7.2 FTE) and associated costs across three organisations partnering to deliver a Community Wealth Building programme in Haringey, Lambeth, and Lewisham. TUI's existing grant differs from the Anchor application as its focus is on project delivery and will not duplicate but instead enhance the overall systemic change TUI aims to achieve.

The Recommendation

Funding is recommended as follows:

To award, in principle subject to the following conditions being met, £1,048,500 over seven years (£149,200; £149,600; £150,000; £149,800; £149,900; £150,000; £150,000) towards core costs to help TUI develop a 'centre of financial excellence' and support Black and minority-led organisations overcome systemic barriers in the voluntary sector.

Confirmation of the award and the first payment will be subject to the following conditions:

- The TUI Directors/Board confirm and provide satisfactory assurance that they have considered, understood, and accepted the risk of taking on liability for advice provided within the Centre of Excellence.
- TUI confirms that the role of CFO (Chief Finance Officer) is in post and will determine the staffing structure, roles and JDs for the new Centre, noting that the CFO may wish to consider the use of consultants to provide advice.

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MEETING: 11/09/23

REF: 20325

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Council of Somali Organisations	Adv: Salma Abdi
Amount requested: £998,877	Base: Hackney
Amount recommended: £999,990	Benefit: London-wide

Purpose of grant request: To enable the charity to support its members and communities through policy work, capacity building and community outreach programs.

The Applicant

Council of Somali Organisations (COSO) was established as a charity (no. 1154667) in 2010 by leaders in the Somali community in conjunction with City Bridge Trust (CBT) and Trust for London. COSO is a national second tier organisation set up for the Somali voluntary and community sector (VCS) to assist as an umbrella organisation. The charity's main objective is to address and respond to the specific and complex needs of the Somali community and the organisations that support them. As a member of COSO, Somali-led organisations gain access to policy and regulations consultation, networking events, training, and guidance on funding applications. In delivering these services, COSO is creating a community hub that encourages and enables Somali-led organisations to participate more effectively within the civil society sector.

Background and detail of proposal

For the last three years COSO has focused on building its infrastructure support, with membership increasing two-fold from 112 member organisations to 250. Thus, highlighting the charity's dedication to improving organisational infrastructure and growth. COSO is committed to being user-led, it regularly conducts needs analysis of the systemic issues members face and publishes research and recommendations accordingly. Most recently, COSO conducted a needs analysis and follow up research funded by the National Lottery on the effects of Covid-19 on Somali run mosques. Alongside needs analysis, COSO utilises surveys, focus groups and co-production sessions where there are member wide discussions to ensure the organisation is being led by the collective voice of its members.

Over the last three years, the National Lottery, CBT, and Trust for London have awarded both core and capacity building funding for COSO which has enabled the organisation to diversify its funding base. However, there is still an issue of dependency on a small number of funders as there is little core funding for second tier organisations. Therefore, this grant will enable COSO to have stability through core funding for eight years, as well as allowing it to attract other sources of funding.

COSO aims to use this funding to recruit and employ a Partnerships and Policy Manager who will increase its reach and partnerships. COSO also plan to use the funding for its Director's salary starting from year four of the grant. COSO is a

national organisation, with 50% of its membership based in London. The charity is applying for core funding which equates to 25% of its income, which is proportionate to London benefit. Trust for London are currently funding this post and CBT's funding will allow for continuity of leadership as well as maintaining sustainability. COSO's Director, is currently undertaking COSO's policy and partnership responsibilities, and with a growing number of partnerships both established and developing, a dedicated member of staff to manage these relationships is needed. Therefore, this funding and this post will ensure that the charity has the capacity to manage and continue dialogues with partners as well as centralise COSO's current partnership work.

COSO is keen on developing institutional knowledge and memory through this post. As it stands, its director by virtue of their position has a deep understanding of the sector and relationships within it. This funding would allow COSO to have a member of staff who can fully commit to managing partnerships allowing for the strengthening of internal institutional knowledge as well as the distribution of expertise. The charity is aware of the dangers of centring an organisation's knowledge on one person and through this post it is taking steps towards ensuring equity and agency in addition to addressing and shifting power dynamics.

COSO are also planning to use this funding for a Digital and Information Content Coordinator. COSO had this post for three years with funding from the National Lottery which has since ended. It aims to reinstate this position as it would support the organisation with its internal communications and external communications for example, its newsletter, website, research, and reports. Previously, this role had resulted in the production of 38 videos on health, migration, mental health, and housing law in collaboration with COSO's partners. With this funding, the charity plans to continue producing digital content to meet the current and future needs of its members.

COSO's is currently working with various NHS Trusts and Metropolitan Police on community outreach and engagement as well as The Ubele Initiative, Greater London Authority (GLA), Advice UK and the British Somali Medical Association. COSO also represents the Somali community on several forums on funding and race equality such as Funders for Race Equality Alliance, Hear Equality, Alliance Race Equality, and the Migrant & Refugee Advisory Panel.

London's Racial Justice sector

There are roughly 70,000 Somalis living in London, concentrated in the boroughs of Brent, Ealing, Tower Hamlets, and Camden¹. In June 2021, Healthwatch Hackney, which advocates for equal access to social services, found that out of 32 Somalis surveyed, the most commonly raised issue affecting health and wellbeing was housing problems, followed by language difficulties and mental health². The Somali

¹ *Creating a contemporary profile of the Somali community in Camden (2022):*

<https://wp.wpi.edu/london/projects/2022-projects-spring/sydrccommunity/#:~:text=Somali%20refugees%20have%20traveled%20to,%2C%20Tower%20Hamlets%2C%20and%20Camden.>

² *Somali community in Hackney and their experience of health and care services (2021):*

<https://www.healthwatchhackney.co.uk/wp-content/uploads/2021/07/Somali-Community-final-June-21.pdf>

community faces multiple barriers in accessing services and high rates of poverty translates into poor health and wellbeing. Housing for the Somali community in the UK has for long been characterised by overcrowding and poor physical conditions. Black and Minority Ethnic (BME) communities are disproportionately impacted by the cost-of-living crisis. For example, Bristol Somali Forum carried out a survey and found that out of 60 people surveyed, 70% are struggling to pay their energy bills and 67% stated that their financial position is affecting their mental health. In addition to this, infrastructure organisations that are BME led by and for have a history of being underfunded. In 2020, when funders were looking to make sure their emergency pandemic grant programmes were reaching communities who needed it most, the mechanisms to reach Black and Minoritised led organisations were not consistently available due to the reduction in number and capacity of equalities infrastructure organisations.

The charity's partnership and systemic change is based around its main strategic themes for the next five years, Education, Employment, Health and Wellbeing, and an overarching theme of Criminal Justice across all work. These themes were implemented following a needs assessment of member organisations to ensure relevancy and co-production. COSO's work is informed by these strategic themes with the goal of initiating social and systemic change that empowers the Somali community as well as challenging systemic racism affecting marginalised communities. Each strategic theme has established thematic working groups where COSO members communicate and discuss obstacles they face within these wider systemic issues. The charity's staff are informed by these working groups which help to steer the direction of the charity's work.

In terms of looking at long term systemic issues, COSO have produced videos on various health issues such as diabetes and cancer which are particularly prevalent within the Somali community³. It is currently working with the NHS on providing resources and dispelling misinformation on vaccines. It also updates its website with translated health information as well as signposting which of its member organisations are best positioned to support those in the community who are facing the impacts of health inequities, thus showing how the charity is working to bridge the gaps between the Somali community and healthcare providers.

³ [Somalis in London - Open Society Foundations](#)

Financial Information

Year end as at 31st March	2022 Signed Accounts £	2023 Draft Accounts £	2024 Budget £
Income & expenditure:			
Income	312,396	384,221	424,089
Expenditure	(265,204)	(366,020)	(413,414)
Surplus/(deficit)	47,192	18,201	10,675
Reserves:			
Total restricted	94,198	98,662	109,338
Total unrestricted	9,164	22,901	33,577
Total reserves	103,362	121,563	142,915
Of which: free unrestricted	9,164	22,901	22,901
Reserves policy target	66,301	91,505	103,354
Free reserves over/(under) target	(57,137)	(68,604)	(80,453)

The figures stated in the table for 2021/22 are restated figures due to there being errors in the 2021/22 signed accounts. COSO's 2021/22 income shows 99% of its total income as restricted sourced from multiple funders such as National Lottery, People's Postcode Lottery and London Community Foundation. The charity's reserves policy is to hold three months of expenditure.

In 2021/22, COSO was significantly below its reserves policy target however the charity has taken cost saving measures such as working virtually to reduce overhead costs of occupying office space. It has invested in its infrastructure for example, implementing Salesforce as part of its Restructure 2020-2023 Plan. This plan is part of COSO's efforts to strengthen the charity's financial position.

From 2023/24 it is seeking to secure long term sustainability of the core funding and activities. COSO aims to do this by cultivating and maintaining funding relationships with the goal of securing multi-year funding. To date COSO has applied to The National Lottery Community Fund as well as working to secure additional funding from Macmillan cancer support. COSO secured income from The Legal Education Foundation in March 2023 for a total of £150,000 (£75,000 per year for two years).

Funding History

ID	Type	Meeting Date	Decision
IPP115	Inflationary Pressures Payment	21/11/2022	£4,800.00 Inflationary Pressures Payment
19381	Anchor Programme - Resourcing Grant	20/06/2022	£3,600 to resource Council for Somali Organisations to participate in a design group co-creating programme design for City Bridge Trust's Anchor funding programme.
16185	COVID19 Small Charity Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £12,250, equivalent to one regular quarterly payment for the organisation's current grant. COVID19
15642	Bridging Divides	26/03/2020	£145,000 over three years to support and strengthen the Somali VCS in London through the development of infrastructure, improving skills to influence policy and encouraging stronger (collective) voices.

13208	Investing in Londoners	18/03/2016	To fund the continuation of business and membership development officer (3) and research and development officers' posts (2).
11987	Working with Londoners	13/03/2014	£100,000 over two years. Salary and associated costs, Business and Membership Development Manager 3 days and Research Development Officer 2 days to build capacity of Somali frontline organisation.
10392	Working with Londoners	17/02/2011	£150,000 over three years for the salary and associated costs of a development officer for a project designed to strengthen front line London Somali community organisations.

The Recommendation

£999,990 over eight years (£110,560; £107,550; £110,940; £126,290; £130,090; £134,030; £138,130; £142,400) towards salary costs of a Partnerships and Policy Manager, a Digital and Information Content Coordinator as well as salary costs for COSO's Director, to enable the charity to continue supporting its members and the wider Somali community.

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MEETING: 11/09/23

REF: 20297

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

End Violence Against Women Coalition	Adv: Anneka Singh
Amount requested: £910,000	Base: Vauxhall
Amount recommended: £979,370	Benefit: London

Purpose of grant request: To support End Violence Against Women Coalition's core costs.

The Applicant

Established in 2005, End Violence Against Women Coalition (EVAW) is a registered charity (number 1161132) that works to transform the systems that enable violence against women and girls (VAWG). It drives social change through campaigning, shaping policy and by challenging the wider cultural attitudes that tolerate and normalise abuse.

EVAW was set up as an independent second tier, unifying a diverse movement behind strategic campaigns and influencing for structural change, securing the first cross-government VAWG Strategy in 2010. The organisation is 100% women-led. It is a feminist coalition rooted in knowledge of overlapping structural inequalities. EVAW's membership is comprised of 143 specialist women's support services, researchers, activists and survivors. 60% of its membership is London-based.

Background and detail of proposal

Funding is requested towards EVAW's core costs. The submitted budget includes a 20% contribution to 9 core staff roles and EVAW's organisational overhead costs associated with its work to end violence against women and girls in all its forms.

EVAW identifies opportunities as they arise, innovating and crafting opportunities from shifts and changes, and nurturing connections to achieve its aims and objectives, which are:

- To influence the state response and social norms related to VAWG - because these influence one another - making the case for radically altered cross-government response to VAWG, prevention and 'holistic justice' for all survivors;
- To ensure the public and those who make and shape policy understand that VAWG is not inevitable, but a cause and consequence of women's inequality; with intersecting inequalities compounding experiences of VAWG;
- To be relevant and responsive to its members.

It works to disrupt the systems and structures that enable and normalise violence and build a fairer world through:

Setting and influencing the agenda:

- Lobbying and advocacy
- Strategic campaigns
- Policy expertise
- Strategic litigation

Movement building:

- Joining the dots across anti-racism, VAWG, human rights and all intersecting oppressions
- Coalition and consensus-building around shared values which recognise the impact of overlapping structural inequalities
- Influencing and mobilising members and supporters to practice solidarity and equitable collaboration

Inspiring action for social justice:

- Storytelling – engaging communications which educate and inform
- Media presence reaching and influencing diverse audiences
- Shaping narratives in public discourse
- Commissioning and publishing research

The proposal highlights that women's inequality and VAWG are not inevitable, yet there is an absence of resourced, ambitious policy to prevent it from occurring. This feeds and, in turn, perpetuates widely accepted social and cultural norms which minimise VAWG, blame victims, fail to hold perpetrators to account and focus on individual safety over collective rights/freedoms.

EVAW observes that the VAWG sectors lifesaving work has been undervalued and under resourced for decades. It foresees that the sector is due to be further impacted by the long-term impact of the pandemic and cost-of-living crisis on women's lives, increasing risks of abuse and curtailing access to justice and protection.

Sustained policy change and shifting thinking around VAWG requires systemic and cultural shifts. EVAW's experience in driving change, as well as tracking and moving public opinion, demonstrates that top-down policy change doesn't work in isolation, and that sustainable change requires a meaningful shift in the value statutory bodies and society place on the VAWG sector and how it operates.

Funding will enable significant work towards EVAW's mission to build a united movement, collectively disrupting oppressive structures and influencing the political, economic, social and cultural changes necessary to end and prevent VAWG.

EVAW acknowledges that its relationship with its members is critical to contribute to anti-racist and feminist movement-building. It is working to address the gaps in its membership, particularly towards stronger representation of specialists responding to disabled, Black, African, Caribbean descent, LGBT+, older and rural women's needs. Its Outreach Strategy aims to strengthen its intersectional understanding of

the impact of law and policy on women and girls' lives, ensuring its strategies are grounded in survivors' lived experiences.

London's VAWG sector

In London, EVAW's expertise and input has been heavily sought to help shape the Mayor of London's VAWG strategy. It is the sole organisation present on strategic partnership boards for the Violence Reduction Unit and the London Criminal Justice Board. As part of its work on justice system accountability, EVAW has been consulted on the development of the London Metropolitan Police's VAWG Action Plan for London and provide ongoing scrutiny of plans to address VAWG, including on addressing police perpetrated abuse.

EVAW recognises London as a key site for piloting and testing innovative approaches to ending and preventing VAWG. In 2019, EVAW fed into the London Rape Review led by the London's Victim's Commissioner and were early stakeholders to a new approach to transform the policing response to rape initially developed within the Mayor's Office for Policing and Crime (MOPAC). This new approach was the blueprint for Operation Soteria that was launched in 2021 as a response to the government's End-to-End Rape Review. EVAW are ongoing key stakeholders to this review, both monitoring progress and holding the state to account on its pledges to increase the number of rape cases progressing to court, and on the implementation of a new national operating model for the investigation of rape and serious sexual assault across all police forces and Crown Prosecution Service areas.

Other recent achievements include:

- Leadership, scrutiny and influence in strategic statutory spaces, notably co-chairing the London Mayor's VAWG Board and its voluntary sector expert group, representing the VAWG sector in Baroness Casey's review into the London Metropolitan and advising the Angiolini Inquiry into the circumstances of Sarah Everard's murder;
- Securing resourcing for EVAW members: a Home Office 'led by and for' ring-fenced fund (£6 million); and £1 million MOPAC Cost-of-Living Fund for VAWG services in London;
- Successfully campaigning for national and London-specific public communications work addressing norms and behaviours among men which underpin VAWG;
- Engagement with London-based media outlets on approximately 100 occasions, reaching vast London audiences via broadcast interviews, podcasts, and press commentary.

Financial Information

Year end as at 31 March	2022	2023	2024
	Signed Accounts	Management Accounts	Budget
	£	£	£
Income & expenditure:			
Income	561,297	493,275	682,800
Expenditure	(455,705)	(595,024)	(599,616)
Surplus/(deficit)	105,592	(101,749)	83,184
Reserves:			
Total restricted	14,653	16,761	16,761
Total unrestricted	450,908	347,051	430,235
Total reserves	465,561	363,812	446,996
Of which: free unrestricted	274,256	170,399	253,583
Reserves policy target	187,389	187,389	195,076
Free reserves over/(under) target	86,867	(16,990)	58,507

EVAW is supported by trusts and foundations. It is forecasting a deficit in 2022/23, which is covered by its carried forward surplus funds from 2021/22. Its reserves policy is to 'have sufficient free reserves to fund the organisation's running costs for three months and to cover shutdown costs'. It expects to meet its target in 2023/24 (the target figure in the above table is inclusive of salary changes, shutdown and liabilities costs identified by EVAW for 2023/24). EVAW spent down a proportion of its designated funds in 2022/23 (80% of its expenditure for the year was against its designated funds).

Anchor Programme funds are included in EVAW's 2023/24 budget as unconfirmed income. 55% of its expected income for 2023/24 is secured (£377,500).

Funding History

None.

The Recommendation

EVAW is an independent second tier, unifying a diverse movement behind strategic campaigns and influencing for structural change to end VAWG in all its forms. Its work fits closely with Anchor Programme criteria. A slightly increased funding level is recommended to account for year-on-year inflation.

£979,370 (£124,000; £128,960; £134,120; £139,480; £145,060; £150,860; £156,890) over seven years towards EVAW's core costs.

MEETING: 11/09/23

REF: 20411

ASSESSMENT CATEGORY: Bridging Divides- Anchor Programme

Lesbian, Gay and Bisexual Anti-Violence and Policing Group (Galop)	Adv: Clara Espinosa
Amount requested: £993,277	Base: City
Amount recommended: £993,700	Benefit: London-wide

Purpose of grant request: To develop Galop's policy and research team and to undertake a mapping study of LGBT+ specialist support services.

The Applicant

Established in 1982, the Lesbian, Gay and Bisexual Anti-Violence and Policing Group, commonly known as Galop, is a registered charity (no. 1077384). It is the capital's leading charity working with the lesbian, gay, bisexual, transgender (LGBT+) community and runs the largest LGBT+ by and for victim support service in the UK.¹ It provides advice, support and advocacy to people who have experienced biphobia, homophobia, transphobia, sexual violence, hate crime, domestic abuse (DA), or sexual violence. It also works with victims and survivors of honour-based abuse and so-called conversion therapies. Galop runs four national helplines and its pan-London hate crime support service reaches 4000 people per year. 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.

Background and detail of proposal

Galop was recently awarded a Bridging Divides (BD) grant to develop a specialist trauma-informed counselling service for LGBT+ people in London who have experienced violence and abuse. Galop are part of the pan-London sexual violence service for the LGBT+ community funded by the Mayor's Office for Policing and Crime (MOPAC) and was the only partner not offering a counselling service to its users.

Whilst Galop is a national organisation, the majority of its project work takes place in London, and its policy and influencing work has a national impact which also, by default impact's London's LGBT+ communities. This funding, at less than 25% of Galop's overall income, represents a clear alignment with the proportion of London benefit.

The charity is in a unique position as a front line and second tier organisation which means service delivery feeds into its second-tier work. It is applying for core funding to provide long term sustainability to its policy and research team by contributing to

¹ By and for services are designed and led by those that share the same protected characteristic(s) as the victims they aim to serve.

three vital roles; the Director of Policy (0.4 FTE), Research Manager (0.5 FTE) and Policy Manager (1 FTE). It wishes to undertake a mapping study of the entire system of LGBT+ accessible abuse and violence specialist support services² in London. The anchor funding will enable Galop to:

- Analyse which specialist services are available to LGBT+ victims and survivors abuse and violence. The focus points will be; how are those services experienced across the LGBT+ identities, how do the services differ from borough to borough and most importantly who is not accessing those services for support. This will involve connecting with other LGBT+ organisations as well as housing, addiction services and health care services.
- Collaborate with LGBT+ and VAWG (violence against women and girls) victim support services to model what the future of LGBT+ inclusive/specialist services should look like and curate an evidence base around the need for specialist abuse and violence services that cater for minoritised communities and LGBT+ identities that intersect (taking into account age, migrant status, ethnic background, faith and identified gender).
- Formalise partnerships with minoritised groups and create a forum for smaller LGBT+ organisations to share learnings, to evidence LGBT+ plus inclusive work and LGBT+ experiences of abuse and violence.
- Secure long-term investment and buy-in from key policy makers, funders, commissioners and wider LGBT+ sector into specialist support and ensure it is recognised and met within national legislation such as the Victims Bill and the Domestic Abuse Act.

Galop meets the criteria of the Anchor programme as it is led by and for people from the LGBT+ community, with 98% of overall staff and 71% of Trustees being LGBT+. Many of the workforce are also survivors of abuse and violence. The charity is committed to equitable practice, it involves service users in the co-design of services, and it has recently employed a Survivor Engagement Manager to improve routes for working with survivors in co-designing delivery of Galop's work. Its equality, diversity and inclusion (EDI) plan is currently focused on transgender and race inclusion as these are groups experiencing disproportionate high levels of abuse and violence however it analyses its data to understand its reach across all protected characteristics recognising that there are additional barriers for some groups within the community.

In terms of second tier support; it develops and tests new models within its services ensuring smaller organisations benefit from a trusted methodology via key publications and one to one support. It delivers training to commissioners and grassroot organisations on the needs of the LGBT+ community. It produces LGBT+ specific commissioning guidance and service standards which involves supporting

² Specialist support services have a specialised understanding of the forms of abuse and violence experienced by LGBT+ people. They are experts in the nuanced contexts in which the abuse occurs, and the barriers people face to reporting their abuse, often these are led by and for services.

smaller organisations to deliver by and for LGBT+ specialist support services. Core funding would allow Galop to formally develop its second tier offer further.

Additionally, Galop has a track record of engaging in local and national policy work to drive systems change. It has coordinated LGBT+ evidence and submissions to key legislation like the Domestic Abuse Act and has worked with MOPAC on service design in London. It also produces representative research into LGBT+ experience of abuse, support services and the criminal justice system locally and nationally. It was involved in a mapping study on DA services commissioned by the Domestic Abuse commissioner's office, which found that out of 803 IDVAs³ only four for were LGBT+ specialists within by and for organisations.⁴

Galop has strong relationships with other service providers in the sector such as Stonewall Housing, Micro Rainbow, London Friend as well as the housing and addiction sector. It also holds relationships with the VAWG team in MOPAC and London councils. It used to convene the LGBT+ abuse and violence network, an informal quarterly meeting to support organisations working in the sector however the network came to a halt after March 2020 due to lack of capacity. Galop worked as part of the Ban Conversion Therapy coalition strategy group and is a member of the Safe Accommodation National Expert Steering Group.⁵

London's LGBT+ sector

London has the largest LGBT+ population in the UK. However, the LGBT+ sector as a whole is small and the LGBT+ anti abuse sector is even smaller with Galop being the only organisation developing second tier support in this area. The sector has been historically underfunded and very little exists in terms of funded by and for LGBT+ services in London. For example, until a few years ago, pan London funding for DA support for LGBT+ people did not exist and only at the end of the pandemic has the sector started to see LGBT+ services being commissioned at a pan London level. The majority of the funding received by Galop is limited to what policy maker's understanding of LGBT+ abuse and violence is, core funding would give the charity freedom to look at the whole spectrum.

The LGBT+ community is disproportionately affected by abuse and violence. For example, transgender victims are 2.2 times more likely to experience physical abuse and 2.9 times more likely to experience sexual abuse compared to cisgender

³ Independent domestic violence adviser (IDVA) is a trained specialist who provides a service to victims at high risk of harm with the aim of securing their safety. They are also known as independent domestic violence advocates and serve as a victim's primary point of contact.

⁴ Domestic Abuse Commissioner. (2021) Huge lack of specialist support for LGBT+ victims. Available at: <https://domesticabusecommissioner.uk/huge-lack-of-specialist-support-for-lgbt-victims/>

⁵ Gov.uk. (2021) Annual progress report from the Domestic Abuse Safe Accommodation National Expert Steering Group. Available at: <https://www.gov.uk/government/publications/delivery-of-support-in-domestic-abuse-safe-accommodation-annual-progress-report-2021-22/annual-progress-report-from-the-domestic-abuse-safe-accommodation-national-expert-steering-group-2021-22>

individuals.⁶ There are negative outcomes for LGBT+ people accessing support from non-specialist services and the criminal justice system. For example, available information on publicity materials and websites about DA support will refer exclusively to heterosexual cis women as victims/survivors and men as perpetrators. This might negatively affect the decision of a LGBT+ survivor to access support.⁷ The LGBT+ services that do exist see the LGBT+ community as one homogenous group and are not necessarily meeting the needs of all intersecting identities within this community; which means that the system is failing some groups more than others. Additionally, hostility towards the LGBT+ community is increasing, plummeting from 1st to 17th place on ILGA's (International Lesbian, Gay, Bisexual, Trans and Intersex Association) Rainbow Europe in the last eight years.⁸ Research shows that LGBT+ victims have better outcomes within by and for services yet there are not enough specialist services in London to meet demand.

Galop's policy and research work is central to its strategy and the charity's core function. In eight years' time, it wishes the sector to more authentically represent the needs and voices of the LGBT+ community including the LGBT+ organisations working on the ground and for solutions to be co-produced and piloted by the sector. Focusing on systemic change, through its policy work, Galop will be addressing the existing structures such as the lack of representation of LGBT+ issues across policies and the lack of by and for LGBT+ specialist support services. These structures contribute to the patterns of inequity such as LGBT+ people underreporting cases of abuse and not feeling like there are services out there to support them. Ultimately, anchor funding will help Galop to create an equitable way for an LGBT+ victim or survivor to get support and to ensure they have equal access compared to the rest of the population in London experiencing abuse and violence.

Financial Information

Year end as at 31st March	2022 Signed Accounts £	2023 Draft accounts £	2024 Budget £
Income & expenditure:			
Income	2,403,085	3,274,360	4,159,611
Expenditure	(2,184,336)	(3,043,823)	(4,463,246)
Surplus/(deficit)	218,749	230,537	(303,635)
Reserves:			
Total restricted	420,281	402,033	88,571
Total unrestricted	420,253	669,038	678,865
Total reserves	840,534	1,071,071	767,436
Of which: free unrestricted	341,002	584,528	594,355
Reserves policy target	407,085	419,585	566,302
Free reserves over/(under) target	(66,083)	164,943	28,053

⁶ Interventions Alliance. (2021) Domestic Abuse in LGBT communities. Available at: <https://interventionsalliance.com/domestic-abuse-in-lgbt-communities/>

⁷ SafeLives. (2018) Barriers to accessing service for LGBT+ victims and survivors. Available at: https://safelives.org.uk/practice_blog/barriers-accessing-services-lgbt-victims-and-survivors

⁸ Rainbow Europe. (2023) Country Ranking. Available at: <https://rainbow-europe.org/country-ranking> (Benchmarking tool to illustrate the legal and policy situation of LGBTI people in Europe)

Galop has secured 82% of its forecast income for 2023/24. The charity is overly reliant on statutory funding largely from MOPAC which it acknowledged at assessment and is actively seeking to rectify. In June 2022, it brought in a designated fundraiser to grow individual giving and to invest in trusts and foundations grant applications. Galop has plan in place to reach its income diversification targets by 2025.

As of 2023/24, Galop's free reserves policy is to hold £566,302 which equates to three months of operating costs as well as costs of winding up and continuity in the event of lost funding. The charity's reserves policy is reviewed by its finance sub-committee on a yearly basis in alignment with the organisation's growth and it currently holds healthy free reserves. The charity is expecting a planned deficit in 2023/24, this is due to funding being carried over from 2022/23 which needs to be spent in this financial year. The 2023/24 budget does not include income coming from the Anchor programme.

Funding History

ID	Type	Meeting Date	Decision
19364	Bridging Divides	26/09/2022	£300,350 over five years towards the salary and oncosts of a full-time Head of Therapeutic Services, and a contribution to overheads.
17835	COVID19 London Community Response Fund (Wave 3)	11/09/2020	£23,056 towards the new build of the organisation's website to meet the surge in demand experienced under COVID-19.
12369	Investing in Londoners	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.

The Recommendation

£993,700 over eight years (£110,200; £113,500; £123,700; £120,500; £124,100; £134,500; £131,600; £135,600) of core funding towards Galop's Policy and Research team.

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MEETING: 11/09/23

REF: 20349

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

HEAR Equality and Human Rights Network	Adv: Shegufta Slawther
Amount requested: £998,500	Base: Islington
Amount recommended: £999,200	Benefit: London-wide

Purpose of grant request: HEAR Equality and Human Rights Network (HEAR) is requesting funding to support its core work as a membership organisation to provide a collective and inclusive voice for equality, social justice and human rights across London to affect systemic change.

The Applicant

Operating since 2004, HEAR registered as a Charitable Incorporated Organisation in August 2016 (Charity Number: 1168591) with voting members other than its charity trustees, and now operates a diverse membership network of over 1,000 community groups, community activists, and front-line organisations across London. It seeks to bring about systemic change in addressing marginalisation and discrimination experiences by those with intersecting identities, and across all protected characteristics. A second-tier equity-led network and organisation (whereby it is led by and for the communities it serves) HEAR brings together and amplifies the collective voices of hundreds of organisations, themselves representing tens of thousands of marginalised individuals, to address structural inequalities and promote equality and justice at local and London-wide levels.

Background and detail of proposal

HEAR has previously received funding from CBT to support and expand its core work of growing and supporting its membership, as well as Cornerstone funding. It has also been one of the Equity Partners for the Propel funder collaboration. The organisation was formed in a voluntary capacity, with organisations and members coming together to volunteer their time and resources to work across all protected characteristics with an intersectional focus. It promotes collaboration, partnerships, and solidarity across different communities, to break down barriers between different specialisms. As such, being 'led by and for' is for HEAR to be led, directed and steered by as diverse a range of Londoners as possible, to ensure that lived experience is at the heart of its direction. Its uniqueness is in the range, size and scope of its membership, all united by one common aim of working for equality in London. This enables a broad range of knowledge, expertise and experience that can be shared across different geographies and specialisms, breaking down barriers and helping to avoid 'silo' working. HEAR's board of trustees and staff represent a range of Londoners in terms of protected characteristics, lived experience of the issues being addressed, and intersectional identities. Its diverse steering group brings both lived and professional experience of the barriers and oppressions faced by HEAR members and those they work with and for.

HEAR has a demonstrable track record of achieving systems change. Examples include achieving improved concessions for disabled Londoners in relation to the expansion of the Ultra Low Emission Zone (ULEZ) by connecting a key member that was a central campaigner on this issue to relevant colleagues in the Greater London Authority's (GLA) health team. Another example was working with member Age UK London, its engagement with the London Digital Exclusion Task Force enabled network members to speak directly with decision makers. Working with broadband providers Community Fibre, Vodafone and BT, HEAR's very small user-led women's groups spoke directly about the experiences of the African heritage women they support around digital poverty. Feedback from the private broadband providers was that hearing directly from those groups was critical to their understanding of the need to change policies and resulted in widely increased access to social tariffs for broadband and phones, benefiting thousands of Londoners. HEAR has gone on to facilitate the London Digital Inclusion Network, bringing together members from large and small organisations, and individual experts by experience, to support campaigning on diverse aspects of digital poverty and inclusion.

The funding requested would provide HEAR with long-term stability, which in turn, would enable it to continue to build on its network of 1,000+ members to support grassroots organisations and individuals with lived experience to have their voices heard. Working on intersectionality, and the impact of this on structural inequality, the charity has already delivered years of core work to establish a strong foundation. Funding will allow it to move forward from a base of strength and experience in working with London's diverse communities and enable the continuation and development of HEAR's work and expansion of its membership and engagement with Londoners across all protected characteristics. Support would reach those facing specific barriers such as homelessness, refugee and asylum-seeking status, those experiencing domestic and sexual violence, the gypsy/traveller community, more marginalised disabled Londoners (for e.g., people with learning disabilities, deaf/blind people, neuro-diverse people, disabled people from different faith backgrounds), and older Lesbian, Bisexual, Gay, Trans and Queer (LGBTQ+) Londoners, to name but a few. More user-led groups and people with lived experience will help HEAR's aim to achieve strategic change through transforming existing engagement practices, so that London's diverse communities can be the decision makers.

Funding will also enable opportunities for HEAR to be more creative and have the space to address challenging and often difficult tensions in the equalities sector. The stability of long-term core funding will also support HEAR's ability to diversify its income sources by developing meaningful projects with members and seeking appropriate funding for these.

The funding required in Year One of the grant will equate to over 50% of the organisation's annual income however the assessor has undertaken an assessment of the organisation's ongoing financial sustainability and is satisfied that there is a strong fundraising plan in place for future years.

London's Equality Sector

HEAR is the only pan-London membership organisation that unites and amplifies the voices of intersectional identities facing specific barriers and structural inequalities to move towards achieving equality, social justice and human rights for all marginalised Londoners. Current challenges facing this sector include legislation, the environment around equity and human rights, lack of capacity, resources and funding, power imbalances that impact grassroots influence and services, a lack of trust and opportunity for all sectors to have open and honest discussions, lack of awareness, information and knowledge, growing demand for services, and a lack of collective and individual voice, with embedded structural inequality across all these issues.

Challenging systemic power imbalances and barriers to shared decision-making whilst building trust and confidence is key. As a pan-equity network, the systemic issues faced by HEAR's network and the communities it serves are multiple, intersectional and complex. These barriers mean that at times of crisis, these communities are impacted the most, as was seen during the Covid-19 pandemic, and currently through the cost-of-living crisis and increasing inflation. This further increases the inequality in service provision which then impacts basic human needs and rights such as housing, health, food, employment, and income. When small grassroots organisations are firefighting to survive and help those that most need it, it can be isolating and depressing. Not having a voice at the table where decisions, policies and strategies are being devised by decision-makers with little or no knowledge of the issues impacting them is real concern. As a result, these further increases inequality, mistrust, and societal problems, within a growing negative political and social environment around equality and human rights, particularly around the issues of immigration, racism and trans equality. HEAR's long-term strategic aim is to bridge the gap between members being asked to provide information on the needs of their communities without seeing any real change. HEAR will be able to explore, with partners and members, sustainable approaches and models for inequality and systems change that can be replicated across sectors and influence London-wide policy and strategy. Without knowing how the negative social and political environment around equity and human rights will develop in the coming years, HEAR will continue to work with partners to counter negative rhetoric and discriminatory practices, update members on external issues, to further innovate and be bold to increase the effectiveness of being a collective and inclusive voice, as an anchor for systemic change, equality and human rights groups across London.

The charity proactively seeks and reaches out to user-led, intersectional equalities groups, to become members, and encourage their active inclusion in the charity's activities to build on lived experience and increase peer learning. Examples of intersectional members include the Asian People with Disabilities Alliance, Black Disabled People's Organisation, Latin American Women's Rights, Tonic Living, Opening Doors London, Micro Rainbow, Sisters of Frida, and Mosaic. The charity's work and services promote an understanding and awareness of intersectionality, and what it means for good practice, service delivery and meaningful inclusion.

HEAR facilitates difficult conversations; exploring and working with the tensions between some of the groups with protected characteristics to treat everyone with respect and with the understanding that consensus will never be reached. HEAR is mindful of the need for safe, supportive relationships that respect people's lived experiences and the potential for re-traumatisation and hold connection and trust at the core. The charity's models move away from exploitative and extractive interactions with people with lived experience; offering a way of getting involved, paying them for their time and expertise and empowering them to speak out. Having done so, they are then supported to become ambassadors for their communities.

Financial Information

HEAR has limited capacity to fundraise and takes a strategic and selective approach whereby applications for funding are only submitted to programmes that closely align with their strategic objectives. In error, its reserves policy was omitted from the 2022 accounts. The reserves policy is to hold three months core expenditure, as presented below, with a view to changing this to six months in the coming years. Some income from London-specific funders, such as Trust for London, are for services rendered. This income is classified as restricted grants, but once responsibilities have been discharged, the income is transferred to unrestricted and thus meeting its reserves policy. 50% of income is confirmed for 2024.

Year end as at 31st March	2022 Signed Accounts £	2023 Management Accounts £	2024 Budget £
Income & expenditure:			
Income	74,217	158,454	143,725
Expenditure	(124,799)	(100,054)	(133,330)
Surplus/(deficit)	(50,582)	58,400	10,395
Reserves:			
Total restricted	65,062	102,811	106,331
Total unrestricted	15,258	35,909	42,784
Total reserves	80,320	138,720	149,115
Of which: free unrestricted	15,258	35,909	42,784
Reserves policy target	15,000	15,000	15,000
Free reserves over/(under) target	258	20,909	27,784

Funding History

ID	Type	Meeting Date	Decision
20030	Propel	12/06/2023	The funding requested would result in CBT being the majority funder for the organisation. Having discussed with the organisation, it is agreed that Propel funding would not be awarded and that the organisation may wish to consider submitting an application for Anchor funding.
20047	Anchor Programme – Resourcing grant	06/03/2023	£3,600 to resource HEAR Equality and Human Rights Network to participate in the advisory panel for City Bridge Trust's Anchor funding programme. This funding is to resource HEAR Equality and Human Rights Network's involvement in the advisory panel until the end of February 2023. Any funds which have not been spent by that point can be used towards HEAR Equality and Human Rights Network's core running costs over the next twelve months.
IPP9	Inflationary Pressures Payment	06/03/2023	£3,103 to support increased costs.

19388	Anchor Programme – Resourcing grant	20/06/2022	£3,600 to resource HEAR Equality and Human Rights Network to participate in a design group co-creating programme design for City Bridge Trust’s Anchor funding programme. This funding is to resource HEAR Equality and Human Rights Network’s involvement in the design group until the end of July 2022. Any funds which have not been spent by that point can be used towards HEAR Equality and Human Rights Network’s core running costs over the next twelve months.
16191	COVID19 Small Charity Emergency Support Funding	13/05/2020	A one-off, unrestricted grant of £12,500, equivalent to one regular quarterly payment for the organisation’s current grant.
14895	Bridging Divides	31/01/2019	£194,000 over five years (£50,000; £42,000; £34,000; £34,000; £34,000) towards the salary of a f/t HEAR Network Co-ordinator and running costs of work to develop and support the membership.
14839	Anniversary infrastructure support programme	07/09/2018	£20,000 over two years towards the salary costs of HEAR and four of the collaborating organisations, together with the associated running costs of a project to test the use of innovative, accessible digital means to enable equality-focussed grassroots organisations to make connections across the voluntary, public and private sectors.
14369	Anniversary infrastructure support programme	14/03/2018	£25,000 over six months towards the salary of a Network Co-ordinator to enable HEAR’s continued active involvement with The Way Ahead.
13925	Anniversary infrastructure support programme	11/05/2017	£50,000 over one year for the co-ordinator’s salary, on-costs and operational cost.

The Recommendation

£999,200 over 10-years (£103,000; £98,600; £98,600; £98,600; £103,000; £98,600; £98,600; £98,600; £98,600; £103,000) of core funding towards the roles of Director and Coordinator (2 FTE) to support further development and support for members to bring about systemic change in addressing marginalisation and discrimination experiences by those with intersecting identities, and across all protected characteristics.

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ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Inclusion Barnet	Adv: Lydia Parr
Amount requested: £979,230	Base: Barnet
Amount recommended: £979,500	Benefit: Barnet

Purpose of grant request: To further enable the charity to challenge systemic barriers negatively impacting Disabled People and other marginalised groups to create better person-centred services and more inclusive communities in Barnet.

The Applicant

Inclusion Barnet (IB) is a peer-led Charitable Incorporated Organisation (no.1158632) and Deaf and Disabled People's Organisation (DDPO), established in 2014. IB delivers peer-led infrastructure and participation programmes for the whole community making Disabled people leaders of social change for all – to fully empower Disabled people, support other marginalised communities in solidarity, and tackle inequalities on a systemic level. IB's initial work centred around developing best practice guidance on peer-led management for DDPOs, now IB supports the local voluntary sector through the Barnet Together partnership; runs the UK's only fully user-led Healthwatch (an independent, statutory organisation dedicated to improving health and social care services) and chairs the Voluntary Community and Social Enterprise (VCSE) Alliance for North-Central London. IB encourages organisations across all sectors to become more inclusive through its training and consultancy arm and delivers two front line services.

With Inclusion London, IB lead a Cornerstone partnership to grow DDPO's communication capacity, and a Propel partnership to grow DDPO advice provision. IB delivers a peer support and benefits advice service; health advice for minoritised communities and engages with and networks local (Disabled) people and communities. IB is active in the Disability Benefits Consortium and the Disability Poverty Campaign Group aiming to get Disabled people's voices heard locally, regionally, and nationally. IB systematically collects evidence from its front-line work to feed into its second-tier work, conducting research and creating resources for effective disability rights work.

Background and detail of proposal

IB have been funded by CBT on three occasions, most recently via a five-year Bridging Divides grant contributing to salary costs and related costs of a project supporting voice for Disabled People and disability organisations. The funding is making a significant positive impact. For example, to date, IB have delivered training on the social model of disability to over 150 members of its local community to produce attitudinal change within organisations. IB continue to be part of the Mental

Health Strategic Partnership which is now leading on the creation of a Mental Health charter for Barnet.

IB is applying for seven years' core funding to strengthen its ability to tackle systemic barriers experienced by Disabled People and other marginalised groups in Barnet. The funding would contribute to IB's core costs and the creation of two new posts, Director of Communities and Head of Policy. The Director of Communities role will have a strong emphasis on IB's community services work, enabling IB to engage more strategically, through wider and more systematic intelligence gathering, identifying system issues, and developing advocacy work to address them. The policy role will ensure IB are methodically collecting evidence, proposing policy responses, understanding wider research, and linking local learning with wider campaigns.

Contributions to other non-frontline delivery roles will ensure frontline staff have appropriate support; that IB have the analysis, communications and advocacy capacity required to engage in impactful systems change work; and will ensure findings uncovered through frontline engagement, direct and 1:1 support and network meetings are acted upon. This will strengthen the voice of the groups IB represent, the efficacy of its work, and it will further ensure IB continue to develop and grow as an organisation.

IB proposes to use Anchor funding to provide training and toolkits to organisations, utilising local network organisations and cross-sector national organisations and networks to grow user voice and jointly address structural barriers that create inequality and poverty across intersecting identities. Funding will enable IB to grow collaborative engagement, policy, and campaigning work. Improved capacity will result in an increase in relevant support, training, and resources; an increase in policy work and research, comprehensive collection of frontline evidence and higher engagement in wider policy work including at the most senior levels locally. Continued involvement with the VCSE Alliance will ensure poverty-informed practice is embedded across North Central London.

IB's proposal meets the criteria for Anchor Programme funding. As a DDPO, IB are committed to being user-led and to the social model of disability. The social model of disability, developed over the last 40 years by Disabled people, holds that people with impairments are 'disabled' by the barriers operating in society that exclude and discriminate against them. Approximately 75% of the staff team, including the CEO and senior management team, declare a disability (including long-term conditions, mental health, neurodiversity). IB are proactive in ensuring that it is otherwise diverse with staff from the Global Majority and LGBTQ+ community. 100% of its board have lived experience, 50% are Global Majority and 75% identify as women. IB's members are Disabled People and family carers in Barnet, who contribute to IB's strategic planning and priorities.

Through user voice work, IB provide second-tier support via training and support to all organisations in the social model of disability, and in using peer leadership, lived experience and co-production to empower those who are marginalised. As members of the Disability Poverty Campaign Groups and the Disability Benefits Consortium, IB

actively work to increase peer representation within and change power dynamics between traditional disability organisations and DPPOs such as IB.

IB aims to address the health inequalities of Disabled People in Barnet and beyond, with full regard to intersectionality and how it impacts on people's life chances. IB look to continuously increase the diversity of the staff team to ensure lived experience of intersectionality is represented to reach diverse communities and serve them well. The basis of IB's work is to actively challenge systemic barriers negatively impacting Disabled People and other marginalised groups to create better person-centred services and more inclusive communities in Barnet and beyond.

IB was formed by a coalition of local people and organisations with key Voluntary and Community Organisations (VCOs) being members and co-delivering services from its inception. IB continues to work collaboratively with other organisations, infrastructure support is delivered in partnership via the Barnet Together Alliance with Young Barnet Foundation, Groundwork, and Barnet council.

London's DDPO sector

DDPOs have a proven track record in creating social change and providing empowering peer support services to Disabled People. Despite this, things are worsening for most Disabled People with rising rates of poverty, exclusion, poorer life outcomes and increasing hostility. The financial crash, followed by a decade of austerity have resulted in many of the gains won by the Disabled People's movement and DDPOs from 1980's to mid-2000's being eroded.

Systemic issues affecting the sector include: statutory relationships with local authorities becoming increasingly transactional and hostile; funding is short-term and non-core resulting in repeat applications; providing adequate levels of support for staff and trustees with lived experience – as well as recruiting and retaining staff with the right skills (and a lack of entry level roles, apprenticeships, and traineeships to up-skill them from); difficulty with intersectionality due to limited resources and lived experience voices; remaining relevant for young people (many older people who campaigned for more rights are now retired).

Inclusion London (the pan-London DDPO umbrella body) shared several recommendations for strengthening the DDPO sector. IB's work fits with a number of these recommendations:

- Delivering disability equality and rights training to local DDPOs who are resourced to deliver this training to their Disabled communities.
- Partnership working and alliance building with wider equality movements.
- Building intergenerational links between Disabled People to empower young Disabled People and support them to become the next generation of leaders.
- Supporting and developing the sector's intersectional skills and practice so DDPOs can become more inclusive, anti-discriminatory and better reflect marginalised groups of Disabled People.
- Carrying out peer research to build a stronger evidence base on disability equality issues and needs of Disabled People and communities.

Supporting IB's proposal would support both systems change around health inequalities for Disabled People and other marginalised groups and strengthen London's under-resourced DDPO sector. IB acknowledge that Anchor funding is not a fix all solution but will give IB grounding to extend its work and impact whilst resources for support and delivery are still overstretched.

Financial Information

Year end as at 31st March	2022 Signed Accounts £	2023 Draft accounts £	2024 Budget £
Income & expenditure:			
Income	984,753	1,221,224	1,482,843
Expenditure	(764,117)	(1,171,486)	(1,474,359)
Surplus/(deficit)	220,636	49,738	8,484
Reserves:			
Total restricted	131,138	154,037	161,775
Total unrestricted	299,997	326,836	327,582
Total reserves	431,135	480,873	489,357
Of which: free unrestricted	292,730	319,569	320,315
Reserves policy target	191,029	292,872	368,590
Free reserves over/(under) target	101,701	26,698	(48,275)

IB is in good financial health, a review of the organisation's previous sets of audited accounts shows sound financial stewardship. Income has increased steadily from 17/18 and continues to do so (Anchor income is included in the above table) with 93% of income for 23/24 already confirmed exclusive of Anchor funding. IB's income primarily stems from a variety of multi-year grants and contract income. As the charity is forecasting a modest surplus and free unrestricted reserves under policy it is prudently working to secure additional funding and return reserves to a level within policy. Long-term core funding from the Anchor Programme would further strengthen IB's income position.

Funding History

ID	Type	Meeting Date	Decision
IPP151	Inflationary Pressures Payment	21/11/22	£5,689 one off payment.
15865	Bridging Divides	08/07/20	£284,000 over five years for salary costs and related costs of a project supporting voice for Disabled People and disability organisations.
13329	Strategic Initiative	24/05/16	£23,800 over 12 months towards the development of a new local giving scheme, Barnet Giving, as part of London's Giving.

The Recommendation

£979,500 over seven years (£129,400; £131,900; £135,800; £139,900; £144,100; £148,400; £150,000) towards core costs to enable Inclusion Barnet to challenge the systemic barriers negatively impacting Disabled People and other marginalised groups in Barnet.

MEETING: 11/09/2023

REF: 20500

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Organisation name: Migrant Rights Network	Adv: Maria Hughes
Amount requested: £ 591,281,80	Base: Newham
Amount recommended: £591,300	Benefit: London-wide

Purpose of grant request: Core funding is requested to enable Migrants' Rights Network (MRN) to work towards greater justice and equity for migrants and refugees in London.

The Applicant

Migrants Rights Network (MRN) is a registered charity (no. 1125746) incorporated in 2006, based in Stratford, Newham working across all London Boroughs. The charity works with and for migrant communities to influence stakeholders and effect structural change to achieve justice and equality for migrants. As a small staff team and board majority led by migratised people (first and second generation migrants), the organisation builds relationships across the migrant and refugee sector, as well as other intersecting sectors. The organisation builds relationships with, and supports grass-root, migrant led organisations to understand issues important to them, and how they can work together to achieve transformational change for migrants.

Background and detail of proposal

Migrants Rights Network plan to strengthen its core work over the seven years of Anchor funding. As the charity is looking at transformational change within the migrant rights sector and across others, the organisation is conscious this work takes time. A full-time Community and Capacity Building Manager will be hired to coordinate the delivery of MRN's work as proposed. The budget also composes of monitoring and evaluation support with an external consultant to support long-term systems change, as well reimbursement fees for people with lived experience who will support with designing this work.

MRN aims to have achieved the following over the seven years of funding:

- 1) Embedded intersectional approaches within organisations strategies – Organisations will be better equipped in understanding how systems of oppression exist, and affect each other's sectors, as well as how identities intersect and affect migrant, refugee and racialised communities (such as Islamophobia and its effect on immigration policy). This will lead to the inclusion of intersectional approaches in policy analysis, campaigns and delivery of services, and embolden refugee and migrant organisations to support one another in social justice issues.
- 2) Influenced the use of language around migrants and refugees, both within the sector and beyond – Migrants and refugees will be leading the sector towards a more appropriate, nuanced and holistic approach around their experiences, and interrogate the history of using this language, and what systems of

oppression have influenced it. Examples of this work to date include MRN's 'Words Matter' campaign, as featured on Sky News¹.

- 3) Growth of solidarity and learning from each other – MRN hope to see an increased understanding and awareness of other social justice sectors, the systems of oppression which affect different communities, and how other sectors are responding to this. This has already and will lead to multi-sector intersectional campaigns where resources can be pooled and experience shared.

To achieve these aims, the following activities are examples of how Migrants Right Network will do this:

- Continue to grow a network of organisations and individuals with a commitment of migrant's rights and justice to collectivise campaign and action.
- Deliver training for other charities/funders, for example around appropriate use of language and the intersectionality with other issues affecting migrant communities, as well as ensure they sign the pledge for the 'Words Matter' campaign.
- Link grassroots, migrant-led organisations with access and resources, for example, access to power-holders and decision-makers and media.
- Facilitate 'Know Your Rights' workshops to help increase migrants' understanding of their rights and how to access them.
- Strengthen and grow migrant leadership through the development of bespoke migrant leadership programmes across London.

MRN's proposal meets the Anchor Programme criteria for funding:

- 1) It is a majority user-led organisation and works collaboratively with migrants and refugees to deliver its workshops and training to the wider sector, such as through the migrant leadership programme with a commitment to equitable practice. Please note however the trustee board is currently slightly under 75% of people from a migratised background. This is due to two Trustees recently stepping down, and they are currently in the process of recruiting two new Trustees with lived experience.
- 2) The organisation provides second-tier support to organisations within the migrants rights sector, and beyond. This is through different approaches including capacity building through training MRN will coordinate campaigns across the sector ensuring grass-roots organisations are supported and given time and space to develop longer term systems change.
- 3) It will work collaboratively with organisations both within the migrant and refugee sector and beyond, with an intersectional and equity focus. Through fostering networking and collaboration between the migrant and refugee sectors with others where key issues intersect, such as LGBTQ+ rights, disability rights, race equality, islamophobia and the cost-of-living crisis; it

¹ https://migrantsrights.org.uk/projects/wordsmatter/#Sky_News- Words_Matter

hopes to not only build allyship across sectors, but also increase understanding how migration intersects with many identities and issues.

London's Migrant and Refugee sector

In the migrant and refugee sector, this is a critical time for organisations and the people they work with and support. There have been rising tensions with the government for some time over the 'illegal migration bill', which has of July 2023 reached royal ascent. This bill includes the controversial plan to send people seeking asylum who arrive in the UK through the government's so called 'illegal routes' to Rwanda, whilst also nearly effectively banning safe routes to asylum for most people. The UNHCR (United Nations High Commissioner for Refugees) has expressed profound concern over this plan, naming it an asylum ban in the UK, which would '*extinguish the right to seek refugee protection in the United Kingdom for those who arrive irregularly, not matter how compelling their claim may be*'². The sector has had to therefore be reactive to this bill as it makes its way into law, building campaigns and lobbying MP's and the House of Lords to introduce amendments to it.

The sector is also dealing with harmful rhetoric across some of the UK media, as well as the rise of the far right protesting outside asylum accommodation. This rhetoric and activity has severe impacts on migrants, refugees and asylum seekers in the UK, with many people feeling more unsafe, unwelcome and anxious. The sector is repeatedly battling against the harmful depictions of migrants in the media and by the government, alongside little capacity and funding for long term strategic planning to counter this. According to Migration Exchange, government grants have fallen significantly by 76% between 2018-21³ within this sector, and funding is overwhelmingly absorbed by only 3% of charities working on refugee and migration issues with over £1 million income⁴. Smaller and grassroots organisations are underfunded and under resourced consequentially.

Working intersectionally has already led to positive developments, such as creation of the Black Europeans group⁵ after workshops hosted by MRN. This is an example of how their dedication to being intersectional, by working with the anti-racism movement in the UK, has seen positive results already. MRN's partners across sectors include: JCWI (Joint Council for the Welfare of Immigrants), Hongkongers in Britain, Liberty, Freedom from Torture, Race on the Agenda, Voice4Change and Praxis. MRN's partnership work extends to funders too, for example it has supported Paul Hamlyn Foundation to frame its migrant rights strategy. Often the language

² [UNHCR https://www.unhcr.org/uk/what-we-do/uk-asylum-and-policy/uk-asylum-and-policy-and-illegal-migration-bill#:~:text=Illegal%20Migration%20Bill&text=The%20legislation%2C%20if%20passed%2C%20would,compelling%20their%20claim%20may%20be](https://www.unhcr.org/uk/what-we-do/uk-asylum-and-policy/uk-asylum-and-policy-and-illegal-migration-bill#:~:text=Illegal%20Migration%20Bill&text=The%20legislation%2C%20if%20passed%2C%20would,compelling%20their%20claim%20may%20be).

³ https://global-dialogue.org/wp-content/uploads/2023/07/People-power-and-priorities_REPORT_MEX_July2023.pdf, p.47.

⁴ https://global-dialogue.org/wp-content/uploads/2023/07/People-power-and-priorities_REPORT_MEX_July2023.pdf, p.27

⁵ https://twitter.com/black_europeans

funders use influences that of organisations when applying for funding and is therefore vital to ensure it is appropriate and reflective of the sectors they fund.

Migrants Rights Network are an integral part of this sector to ensure longer term, transformational systems change. Whilst many other organisations are understandably reactive to ongoing asylum law in the UK, among other pressing issues (large cuts to legal aid, impacts of Brexit - making child reunification more difficult for example), MRN are able to support these organisations to be proactive as well as reactive in reaching longer term change with an intersectional approach by ensuring collaboration across sectors.

Financial Information

Year end as at 31 March	2022	2023	2024
	Signed Accounts	Management Accounts	Budget
	£	£	£
Income & expenditure:			
Income	132,156	89,606	444,919
Expenditure	(163,408)	(160,347)	(276,656)
Surplus/(deficit)	132,156	(70,741)	168,263
Reserves:			
Total restricted	42,779	14,235	77,846
Total unrestricted	103,291	61,094	165,746
Total reserves	146,070	75,329	243,592
Of which: free unrestricted	101,969	59,772	164,424
Reserves policy target	40,852	40,087	69,164
Free reserves over/(under) target	61,969	32,523	118,751

MRN's free reserves level has been over its target (three months expenditure) for the past couple of years. This is due to a large unrestricted grant received during the covid-19 pandemic, which was used towards its reserves. Due to lower income however in financial years 2022 and 2023, the organisation has been using its higher reserves to draw down funds to use on unrestricted expenditure.

MRN's income has seen fluctuations in recent years. Whilst the last couple of years have seen a decline in income, MRN are on an upward trajectory looking forward. For the 2024 financial year it has already fundraised enough to cover the charities core costs with more applications in the pipeline for other planned work, including unrestricted funding. Whilst the proposed budget for this current financial year (2024) is much higher than has been in previous years (including the Anchor application), it has significant plans for future work and hope to be able to employ more staff to carry this out. MRN have also factored in costs for a potential office move (to a more suitable space), which would incur larger costs. MRN is also diversifying its income from grants through consultancy work, through training and workshops with funders and supporting the development of EDI strategies.

The anticipated budget for 23/24 indicates Anchor funding would be less than 50% of total income, with 45% of budgeted income already confirmed. Even if only confirmed income to date is received, Anchor funding would be less than 50% of total income. Although the proportions would not have been met in 2022/23, there is in any case an exemption to the policy of responsive grant funding being less than 50% of income for the Anchor programme.

Funding History

ID	Type	Meeting Date	Decision
11206	Working with Londoners	27/9/2012	£99,000 over three years (£32,000; £32,500; £34,500) towards the part time salary (2.5 days) and associated running costs of a capacity building programme.
16064	Bridging Divides	28/1/2021	Rejected funding for £65,730. Funding applied for towards their 'London Connected' programme Application was rejected due to financial concerns of the organisation, primarily their low free reserves level and a significant drop in annual income and turnover of trustees.
14841	Anniversary Infrastructure Support Programme	15/8/2018	A grant of £5,050 towards staff costs to scope out a proposed project for amplifying the voices of those with lived experience of migration, as well as securing legal opinion on safeguarding voices. The applicant decided it didn't have sufficient capacity to carry out the second round of funding and the amount was written back.

Previous rejection was due to staff and trustee changes, low free reserve levels as well as the ability to demonstrate the changes they proposed in the Bridging Divides application. MRN are in a more stable situation now. The reserves level has significantly increased in recent years. The staff changes were during a period when the director was on maternity leave, with an interim director. Your officer is confident the organisation is in a more stable position to receive funding.

The Recommendation

£591,300 over seven years (£74,880, £76,525, £80,048, £85,102, £87,225, £91,260, £96,260 towards the core costs of the organisation, including the full-time salary of the Community and Capacity Building Manager to increase collaboration, solidarity and justice across the migrant sector as well as with intersecting sectors (such as LGBTQ+, disability, race equality).

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MEETING: 11/09/23

REF: 20310

ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Muslim Charities Forum	Adv: Hannan Ali
Amount requested: £1,075,000	Base: Southwark
Amount recommended: £925,000	Benefit: London-wide

Purpose of grant request: Muslim Charities Forum (MCF) require core funding towards the continued development and launching of a strengthened governance support framework including recruiting a Governance Support Lead.

The Applicant

Muslim Charities Forum (MCF) is a registered charity (no. 1166149) established in May 2007. MCF is an infrastructure organisation supporting Muslim-led charities (MCs) based in the UK through roundtables, advocacy, training, and research. It promotes collaborative working and knowledge sharing amongst 16 member charities and 400 charities of which over 60% are based and/or serve the needs of communities in London. The charity has published guides and magazines on ethical excellence, partnership working, refugees' response, international insights, sector updates, Zakat information, and environmental action.

Through a strong network and partnerships with external bodies, funders, and policy makers, the charity helps organisations to strengthen charity governance, improve financial resilience, and develop sustainable practices. In 2021, it partnered with National Citizen Service (NCS) to develop a 'Future Leaders Programme'. MCF are a part of numerous national partnerships/movements, including the Vision for Volunteering and Voluntary Charity Sector Emergency Partnership (VCSEP).

Background and detail of proposal

MCF require £925,000 over ten years towards continuing development and launching a strengthened governance support framework comprising of: relevant resources; a bespoke health check; one-to-one support; programmes of events; and a network of professional service support providers. By growing its capacity through recruiting a Governance Support Lead (GSL), the charity will improve governance within the MC sector. The post holder will be responsible for leading advice and guidance to groups around to equip and inform MCs with necessary regulatory and legal information. The GSL will have experience and understanding of key charity legislation and impact for compliance and regulations in charity and community settings. Additionally, the GSL will advise and provide practical support for actions such as creating and modifying a constitution or restructuring a charity.

The bespoke charity health-check will be accessible through the charity's website. This will become a simplified tool groups with little to no capacity for training and development can use to improve their organisations. The resources produced will be digestible, appropriate, and relevant, and will cover a range of topics such as setting up a charity, language, and writing bids, financial management, data literacy, sustainable practices, etc. The one-to-one support will include monthly check-ins with the GSL; this will be included in the framework as it was a popular support tool previously. The GSL will also provide administration support and assist with

arrangements for events including webinars and roundtables with charities and stakeholders. Finally, the GSL will co-ordinate with a network of professionals and develop a directory of professionals and services that can provide specialist support in legal, financial, fundraising, and safeguarding areas. This would include pro bono offers to ensure accessibility for all charities.

MCF is entirely led by and for the communities it serves. The Board of Trustees comprises people from the Muslim faith communities and Communities experiencing racial inequity such as Asian, African, and Arab – all of whom have professional experience within the charity sector and have direct or indirect lived experience of the challenges. The charity's ambition is to become the nexus between charitable organisations and social and political powers that influence the mainstream third sector. It reaches out to its network to obtain feedback and input through events, engagements, reports, etc. All intelligence gathered informs the charity's strategy. Factors such as key engagement milestones, programme retainment and digital metrics will be monitored to ensure project success.

Due to established trust, shared religion, and culture, the charity is able to reach organisations supporting refugees, migrants, asylum seekers, other faith groups, those with health issues, people who are educationally socially or economically disadvantaged, and underfunded groups. It works with organisations working exclusively with these groups and more intersectionally. MCF has existing relationships with Tudor Trust, Barrow Cadbury Trust, London Community Foundation, Islamic Relief UK, Comic Relief, National Zakat Foundation, The Charities Commission, and The Fundraising Regulator. It recently held a successful roundtable discussion with 25 members and representatives of the community which investigated members funding awareness, skills, and access to grant funding. The postholder will leverage MCF's existing connections to develop an internal steering committee with external partners to ensure further collaboration collaborative working is retained, and potential duplication of support is avoided.

Using the funding to deliver systemic change, by supporting organisation tackling the causes of systemic inequality and injustice, especially for Muslims, MCF envisage a more resilient Muslim charity sector in 10 years' time having restored, repaired, and re-energised service users. The broader impact in the charity sector will include improved integration and representation and leveraging more funding towards MCs. The work proposed is part of the charity's core functions and is aligned to its 'Engagement' and 'Advocacy and Research' priorities. 'Engagement's' objective is to inspire excellence in practice through relevant and tailored capacity building, and 'Advocacy and Research' aims to maintain and enhance engagement with the relevant institutions and partners to strategically advocate for MCs. MCF meet the Anchor funding criteria as it is a second-tier support organisation which is user-led, intersectional in its approach, embraces complexity, constantly learns, works at various levels concurrently, makes effective interventions, and understands agency, power, and responsibility.

London's Faith sector

The report 'What a difference faith makes' by New Philanthropy Capital (NPC) (2016)¹ to which MCF contributed, emphasised that faith-based charities (FBC) have huge potential to create impact for their beneficiaries and for society and are a valuable part of the voluntary sector, yet outside of the faith community, many people were unaware of the contribution and potential. The lack of knowledge about FBC makes it harder to understand the challenges and benefits that being a FBC might present. Conflicting views on the role of faith in society, a high public awareness of a small number of negative events, and diminishing financial support, has at times resulted in a suspicious and hostile attitude towards religion, particularly those of the Islamic faith. NPC figures showed other faith charities received a higher proportion of the faith-based sector income compared to their representation, whilst MCs received a lower proportion compared to their representation.

The University of Sheffield report 'Faith responds to modern slavery'² found that there was an evident discomfort where FBC working on modern slavery would de-emphasise their faith origins because they felt being overtly religious could limit funding opportunities. Dame Sara Thornton, the independent anti-slavery commissioner, stated that "*that many faith-based organisations have very strong positions on non-proselytisation.*" The Bloom Review (2023)³ one of the largest public calls for evidence was conducted over three years, also recognised, and affirmed the contribution that faith, people of faith, and places of worship make to society. FBC contribute hugely to the effectiveness of government when it attempts to tackle pressing social challenges and make up around 27% of charities in England and Wales. Nevertheless, the review concluded that "*Faith literacy is woefully inadequate, particularly among civic leaders and policy makers.*" The review found that the terms 'faith, belief, religion,' and other basic tenets and principles are often poorly understood. One of the recommendations stated that "*Government should learn from the effective faith engagement programmes initiated during the pandemic and hold regular roundtables... all groups having the right to speak and be heard at appropriate levels.*" MCF's proposed work is seeking to address these findings by supporting affected groups."

Since 2020, MCF has continued to uncover the concerns that restrict MCs' progress in embedding best practice, building resilience or upscaling to reach further marginalised communities. From correspondence with the Charity Commission regarding the number of MCs who have faced investigation for failure to comply with regulations (18% of those for whom a statement was published, 2018-2023) as well as further research conducted with funders and partners (including a UK wide mapping exercise with Barrow Cadbury Trust), governance issues are some of the most pressing systemic issues. These issues are compounded further by a lack of engagement both with and from the mainstream sector. This has resulted in MCs serving multiple marginalised groups, Muslim and non-Muslim, but are siloed. The closure of the Small Charities Coalition (SCC) and The Foundation for Social Improvement (FSI) has further removed vital second-tier support.

¹ NPC 2016 [What a difference a faith makes](#)

² Civil Society Media 2020 [Faith-based charities uncomfortable being 'overtly religious', finds report](#)

³ The Bloom Review 2023 [Does government 'do God?' An independent review into how government engages with faith](#)

In 2021, MCF partnered with The London Community Foundation to support Waves 4 and 5 of the London Community Response Fund during the Covid19 pandemic. This focused on London-based charities, investigating their awareness, skills, and access to grant funding. The common barriers discovered and reported⁴ included lack of awareness and skills in applying for grant funding, lack of trust in funders due to unconscious bias and Islamophobic stereotyping, anxiety about monitoring practice, and ineligibility due to a lack of funder due diligence awareness. MCF is currently working with VCSEP National Emergencies and Members Engagement Programme, which was designed to assist and facilitate the integration of MCs in local emergency responses. A trend noted included less funding available leading to more competition between charities to obtain funds, which meant when less funds were awarded, downsizing occurred. A common challenge was small teams with limited resources were taking on larger roles to support their communities, which was leading to burnout. The charity's impact over the last six months has seen direct contact with over 100 MCs delivering services to a range of communities.

Financial Information

Year end as at 31 March	2022	2023	2024
	Signed Accounts £	Draft Accounts £	Forecast £
Income & expenditure:			
Income	346,793	454,582	384,745
Expenditure	(503,815)	(463,692)	(394,704)
Surplus/(deficit)	(157,022)	(9,110)	(9,959)
Reserves:			
Total restricted	59,789	113,248	116,551
Total unrestricted	169,717	107,148	93,886
Total reserves	229,506	220,396	210,437
Of which: free unrestricted	169,612	107,043	93,781
Reserves policy target	125,954	98,676	70,292
Free reserves over/(under) target	43,658	8,367	23,489

MCF's membership income increased slightly from £114k in 20/21 to £131k in 21/22 and to avoid reliance on this income strand, the charity generated funds from donations, projects, and grants. MCF were selected as an intermediary partner for the Global Majority Fund and awarded £250k in February 2021. It brought forward restricted funds from the Fund in 20/21 to 21/22 and distributed £230k to 22 organisations. General charitable expenditure in 21/22 remained similar to the previous year 20/21. The charity's reserves policy is to hold three months administrative expenditure, or a minimum of £30k (an increase is currently being discussed by the trustees) for closure of the charity; for the basis of this assessment, the three-month range was used, therefore in 21/22 it held sufficient funds and is in a healthy financial position overall. The budget and forecast figures above do not include recently awarded Infrastructure funding and Anchor funding figures.

Funding History

ID	Type	Amount	Meeting Date	Decision
20061	Bridging Divides (BD)	£245,500	31/07/2023 CFD DA	£245,500 (£72,500, £82,000, £91,000) to deliver policy development and advocacy, to strengthen representation of the London
-	-	-	-	-

⁴ London Community Foundation 2021 [Overcoming barriers to funding](#)

	Infrastructure funding			Muslim-led charity sector and build capacity for minority communities.
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The BD funding to deliver policy development and advocacy is not a duplication of works proposed under the Anchor Programme, although both compliments each other. The Policy and Advocacy Lead will focus particularly on stakeholder engagement, whereas the Governance Support Lead will focus on working with charities delivering support and training.

The Recommendation

MCF will work to ensure that Muslim communities and their grassroots charities are more resilient and robust through implementation of a strengthened and expanded comprehensive governance framework and aim to have FBC better represented at decision-making levels. Governance support is a core part of MCF's mission and one of its four pillars, therefore the funding supporting this element of its work will support its overall vision. The need for the support proposed to create systemic change has been evidenced over the recent years, and due to a lack of understanding of the intersectionality of Muslim-led charities in civil society, barriers to funding have been amplified. It is best placed to act as the driving force behind this change, and over the next decade expects improved understanding and cohesion within the sector. The GSL will have experience and understanding of key charity legislation and impact for compliance and regulations in charity and community settings. The variance between the original and revised request was due to initial forecasting and budgeting error.

£925,000 over ten years (£96,000, £84,000, £84,000, £86,000, £95,000, £91,000, £93,000, £95,000, £99,000, £102,000) towards the continued development and launching of a strengthened governance support framework comprising of: relevant resources; one-to-one support; a bespoke health check; programme of events; and a network of professional service support providers. The grant includes the recruitment of a new Governance Support Lead role.

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ASSESSMENT CATEGORY: Bridging Divides - Anchor Programme

Southall Community Alliance Amount requested: £520,000 {Revised request amount: £543,400} Amount recommended: £543,400	Adv: Lydia Parr Base: Ealing Benefit: Ealing
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Purpose of grant request: A contribution towards core costs to enable SCA to support Global Majority voluntary sector groups to challenge systemic barriers within Southall and the surrounding areas.

The Applicant

Southall Community Alliance (SCA) is a registered charity (no.1104671) and not for profit company based in Southall. Established in 2000 as an umbrella network it has 75 affiliated group members, who assist residents from a wide variety of backgrounds. SCA aims to develop the capacity and skills of the members of the socially and economically disadvantaged community of Southall and surrounding areas, so they are better able to identify, and help meet, their needs and participate more fully in society. SCA promotes equality and diversity and good race relations by co-ordinating, organising and providing facilities and activities specifically targeted at Global Majority¹ groups in the community enabling them to develop their capacity and skills to participate more fully in society.

SCA activities are multifaceted, acknowledging the reality of the multiple intersecting disadvantages and circumstances that users and organisations face. Activities include fundraising advice and support, policy and governance training, capacity building for resilience, a resource centre with hot desk facilities, 'Southall Connect' a partnership project combatting social isolation, monthly community forum meetings, environmental projects and promoting local anti-racist history in schools.

Background and detail of proposal

SCA have been funded by CBT on three occasions, most recently via a three-year Bridging Divides grant to facilitate it in delivering anti-poverty capacity building activities to Global Majority community groups in Southall. Recruitment difficulties (commonplace in the sector as it significantly lacks racial diversity²) early on resulted in delays starting activities however since then good progress has been made.

SCA is applying for eight years' core funding to enable it to support Global Majority voluntary sector groups challenge systemic barriers within Southall and the

¹ Global Majority refers to people who are Black, Asian, Brown, dual-heritage, indigenous to the global south, and or have been racialised as 'ethnic minorities'. Globally, these groups currently represent approximately eighty per cent (80%) of the world's population.

² ACEVO Institute of Fundraising Racial diversity in the charity sector report <https://www.acevo.org.uk/wp-content/uploads/2018/07/Racial-diversity-in-the-charity-sector.pdf>

surrounding areas. SCA has been providing second tier support to Southall organisations since 2003. Its long-term sustainability has been affected as it faced over a decade of under-investment in its capacity building work. Since 2010, SCA have supplemented organisational income by developing new projects and thereby lost core focus on policy work that helped organisations through structural change.

SCA proposes to use the Anchor funding to facilitate system change around socially and economically disadvantaged groups. Inequalities related to socially and economically disadvantaged communities include inequalities in education, health, housing, and crime rates. Funding would contribute to SCA's core costs including contributions to the roles of the SCA Director and Administrative Officer. Funding would enable SCA to expand its capacity building for resilience work equipping organisations with tools and skills to enhance resilience against poverty's adverse effects and empowering them to be advocates for positive change within the community.

SCA would directly support more fundraising bids especially larger partnership applications encouraging and educating groups on diversifying income generation to increase sustainability. Group training and networking opportunities will be arranged, building digital resources and a policy library, and conduct annual mapping of services in Southall to assist groups looking to recruit new and diverse volunteers and trustees. Knowledge sharing will be enhanced amongst members via a range of insight and knowledge sharing seminars to help identify emerging challenges and local responses for the community sector.

New members will be recruited to ensure membership reflects local demographic diversity. Groups will be united in 'communities of interest' to proactively influence policy makers in Ealing. The communities of interest will influence the development of health, regeneration and anti-poverty policies encouraging partnership working to reduce duplication of work across the borough. Outreach and co-production meetings will be conducted to develop a shared vision for the social and cultural regeneration of Southall. SCA will also use the funding to explore and consider the efficiencies that co-location of community services could yield as this was previously very valuable in the borough.

The 2021 Census recorded most wards in Ealing had over 85% residents from Global Majority and migrant communities, with over 170 languages spoken within the borough. This population and community sector have been disadvantaged for years by three main intersecting systemic issues:

1. Poverty - Successive Indices of Multiple Deprivation have confirmed the high levels of income deprivation in Southall wards, particularly affecting older people. Southall was the worst affected area by the pandemic in the borough of Ealing recording the highest job losses, number of staff on furlough and number of new benefit claimants.

2. Health Inequalities – Ealing Council research summarised in the Joint Strategic Needs Assessment report³ the most significant areas of health deprivation are found in the West and East of the borough, including areas in and around Southall, Northolt and Acton.
3. Racial Inequality - Southall has a transient community. It has large Indian, Somali, Afghan, Tamil and Goan communities, many of whom have poor English, limited digital skills, and are affected by social and cultural segregation. The proportion of people who cannot speak English well or at all in Ealing is significantly higher than the England average, in all wards. Southall Broadway and Southall Green have the highest proportions (over 15%) of those who cannot speak English well or at all, the highest proportion of deprived households and are among the wards with lowest household incomes.

SCA's proposal meets the criteria for Anchor Programme funding. It is a user-led organisation, of the 75 affiliated group members, 95% work with residents of Somali, Indian, Afghan, Goan and Pakistani origins. The majority are of Muslim, Sikh or Hindu religious backgrounds. 100% of SCA staff and trustees are from global majority backgrounds. SCA constantly reviews the involvement of newer migrant communities in the area and seek staff, trustees, and volunteers to reflect demographic changes. SCA works in an equitable way involving members in the design and delivery of services and is looking to encourage further co-design projects to tackle fundamental issues in the community.

SCA provides second-tier organisational infrastructure support via operating a community resource centre, fundraising support, delivering training to build networking and capacity, and acting as a voice for Southall voluntary sector on borough wide networks. It has an intersectional approach, for many Southall groups race, ethnic origin, migration status, gender and educational attainment combine to perpetuate marginalisation. SCA has 8 funded projects involving 27 partners, some repeat, allowing SCA to support organisations helping communities affected by intersectionality i.e., migrant women who cannot access services with no recourse to public funds, poor English communication or lacking digital skills.

SCA has a strong track record of system change work. SCA works to tackle multiple issues which marginalise the community i.e., building organisational ability to tackle social isolation, developing resilience to poverty, and building Global Majority voluntary sector capacity to develop community campaigns. For example, since 2005 SCA have helped local groups attract over £4 million of funding in small and medium grants or as partners in consortia bids.

SCA has an established track record of working in partnership with other organisations, both in Southall and across London. Since 2012 SCA has led on borough wide voluntary sector consortia, involving other infrastructure groups, on public health, self-care, and neighbourhood development. Existing partnerships include a social isolation and health inequality project with Ealing Council and 11

³ Ealing Council Joint Strategic Needs Assessment report 2021 can be accessed here: https://www.ealing.gov.uk/downloads/download/6772/population_characteristics_-_jsna_2021

other Southall organisations and digital inclusion, anti-poverty, and cost of living projects with an additional 15 organisations. SCA recently established the Southall Business Forum and Southall Schools Forum, connecting the voluntary sector with local businesses and schools and the monthly community forum provides engagement with numerous organisations.

London's Racial Justice sector

The Racial Justice sector has been historically underfunded with many organisations struggling to access funding to cover core costs and service delivery. Internal data analysis found in 2010 there were over 50 Racial Justice infrastructure organisations in England. Specialised funding ended in 2011, since then, 10 national infrastructure organisations closed, along with seven larger local/regional organisations (and more smaller organisations). This resulted in gaps in reach during the pandemic, for example. Additionally, racism within the charity sector impacts on the workforce generally, and within Global Majority-led organisations including – not enough leaders due to lack of opportunity, funders not understanding the benefit of Global Majority experiences, and funders having a paternalistic moral superiority approach.

To achieve systemic change SCA will need to build partnerships that focus upon second-tier support, including with newer voluntary sector groups representing more recently arrived migrant communities, organisations doing similar work in London through the Anchor programme to share good practice, Ealing Council departments, West London NHS structures, and sub-regional voluntary sector support organisations. Supporting SCA's proposal could not only support system change within Southall and the surrounding areas but also strengthen London's under-resourced Racial Justice sector.

Financial Information

Year end as at 31st March	2022 Signed Accounts £	2023 Draft accounts £	2024 Budget £
Income & expenditure:			
Income	193,888	345,008	402,001
Expenditure	(243,043)	(269,746)	(370,250)
Surplus/(deficit)	(49,155)	75,262	31,751
Reserves:			
Total restricted	48,734	113,403	129,954
Total unrestricted	2,835	13,428	28,628
Total reserves	51,569	126,831	158,582
Of which: free unrestricted	(2,914)	7,679	22,879
Reserves policy target	60,760	67,430	92,563
Free reserves over/(under) target	(63,674)	(59,751)	(69,684)

The charity was holding negative free reserves at 31/3/22, draft accounts show SCA has been building free unrestricted reserves by continuing to employ efficiency savings to reduce expenditure where possible. SCA created a sustainability plan to identify means of increasing free unrestricted reserves in 23/24. Activities include introducing membership fees, securing business sponsorship, and increasing advertising of its bookable facilities and resources. Income is steadily increasing year

on year with SCA pursuing a diversified funding portfolio, as demonstrated in 22/23 where the proportion of other grant funds exceeded funding received from Ealing Council. With 90% of income confirmed (excluding Anchor funding) from a range of multi-year grants and a small surplus projected for 23/24 the organisation is continuing to improve its financial health. Long-term core funding from the Anchor Programme would further strengthen SCA's income position.

Funding History

ID	Type	Meeting Date	Decision
IPP201	Inflationary Pressures Payment	21/11/22	£3,504 one off payment.
16033	Bridging Divides	28/02/20	£94,150 over 3 years towards the costs of a Project Officer and other project costs of delivering anti-poverty capacity building activities to BAME community groups in Southall.
17550	LCRF W3	31/07/20	£33,839 towards a health advisory service for BAME community groups over 6 months.
11481	Working with Londoners	15/11/12	£31,500 over 2 years towards the provision of volunteer training and healthy living activities for elderly BME residents in Southall.

The Recommendation

£543,400 over eight years (£69,550; £68,900; £68,250; £68,250; £67,600; £66,950; £66,950 £66,950) towards core costs to enable SCA to support Global Majority voluntary sector groups to challenge systemic barriers within Southall and the surrounding areas.

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Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: Strategic Initiative: Responsible Finance	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Decision
Report author: Tim Wilson, Funding Director and Social Investment Fund Manager	

Summary

The September 2022 Committee meeting approved a support package for funded organisations to help manage persistently high inflation. The paper also noted that increased living costs were leading many low-income households to turn to short-term debt, and that officers would investigate how City Bridge Trust (CBT) could support access to affordable credit. This paper proposes an approach to strengthen the lending capacity of three Community Development Finance Institutions and build a more robust evidence base for future support from Government.

Recommendation

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) **Award £788,000 over two years** to Responsible Finance to provide a first loss allocation to three Community Development Finance Institutions (CDFIs) to leverage additional investment to focus on lending to London residents facing financial insecurity and build the policy case for Government support to the community lending sector.

Main Report

Context

1. In Committee's September 2022 paper on high-inflation, officers noted that CBT would look at ways to support the work of London-focused responsible low-cost community lenders. Since then, CBT has examined what it could do via grant finance to boost flexible credit facilities for the most vulnerable, and this proposal recommends a way forward.

Background

2. Persistently high inflation started at time of economic vulnerability for many households. In March 2022, StepChange reported that around 20% of UK adults had less than £100 in savings and that more than 1 in 5 people expected 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. 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.

3. Since 2013 there has been an 86% drop in commercial subprime lending (e.g., from providers such as Wonga). Whilst much of this decline was the consequence of new regulation from the Financial Conduct Authority (FCA) to protect consumers through enhanced affordability checks and price caps, the diminution of this sector left little alternative provision. 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.
4. 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.

Proposal

5. Responsible Finance (RF) is the working name of the Community Development Finance Association, a company limited by guarantee without share capital (number 04111603). It is the umbrella organisation for Community Development Finance Institutions (CDFIs) working to develop the sector and act as an advocate to Government and the finance industry for its membership.
6. CDFIs are locally focused social enterprises lending to people and businesses who cannot access bank finance. Prospective borrowers are typically on low income, may have limited or poor credit history, meaning they either cannot access mainstream credit, or can only access at very high cost. CDFIs aim to provide a more personalised approach to risk assessment, transparency about the costs of borrowing and lend in such a way that finance is repaid. The demographics of people CDFI's work with are similar to those borrowing from illegal lenders.
7. In 2022, CDFIs lent a total of £248m and reached almost 95,000 customers¹. This is estimated to have saved low-income households £28m in interest payments compared to borrowing from high-cost lenders.
8. Whilst the Government confirmed that financial inclusion would remain a named cause of its expanded Dormant Assets Scheme, and this will channel additional

¹ Representing £117m to 416 social enterprises, £81m to 3,230 start-ups, £46m to 90,630 individuals, and £4m to 465 homeowners.

monies in the CDFI sector, this has been provided mainly as capital to lend. Funding to cover lending risk and scale up lending at greater scale remains scarce. The FCA estimates that around 1.3m UK adults do not have a bank account. This represents a substantial number of people who lack access to banking services and credit from regulated sources when needed.

9. 'First loss' finance is used by CDFI's to absorb loan losses when customers cannot repay. It is also catalytic, leveraging more money by providing comfort to lenders who are looking to back a CDFI. Responsible Finance states that every £1 of first loss grant funding allows a CDFI to secure additional investment from a bank to then lend onwards to customers.
10. RF has worked with three London-focused CDFI members, [Fair Finance](#), [Salad Money](#), and [Fair For You](#), to model the leverage they could generate on a first loss grant from City Bridge, the lending they could provide as a result, the Londoners they could support, and the savings this could represent for low-income households. The amount of total lending varies depending on how long each CDFI expects to need to secure match funding. CDFI 1 expects to need longer, whilst CDFIs 2 and 3 expect to be able to start lending immediately and recycling the loan finance at least once. The table below illustrates anticipated impact whilst anonymising the members given that borrowing discussions are ongoing:

	CDFI 1	CDFI 2	CDFI 3	Total
First loss grant from City Bridge	£200,000	£200,000	£200,000	£600,000
Total private investment leveraged over 2-year period.	£800,000	£935,000	£2,500,000	£4,235,000
Expected total lending enabled.	£1,000,000	£3,900,000	£5,491,000	£10,391,000
Number of Londoners supported.	2,857	5,308	5,491	13,656
Forecast savings for borrowers (compared to borrowing from commercial lenders).	£880,000	£1,634,864	£1,691,228	£4,206,092

11. The recommended £600k would help absorb loan losses when customers cannot repay and strengthen the CDFI balance sheets to enhance their borrowing capabilities. Modelling by the CDFIs indicates that the £600k would have a multiplier impact of just over 7x by attracting £4.2m of private investment. Additional to the £600k, is £60k to cover the CDFIs legal costs for securing private match, marketing, and reporting costs.

12. Alongside the work to scale responsible credit provision in London, funding is also recommended towards an external evaluation of first loss finance the programme to evidence the impact on the CDFI balance sheet as well as on the customers. The intention is to provide evidence to Government for support to the CDFI sector, and following discussions with others in the financial inclusion sector, officers recommend resourcing this work appropriately, so it has greatest potential to influence HM Treasury. This means a robust benefit-cost ratio, likely delivered by an economics consultancy with experience of working to HM Treasury's [green book](#) method, and able to provide evidenced analysis of the wider impacts of CDFI lending.
13. As the grant-holder responsible for onward funding to the CDFIs as well as management and reporting, the recommendation to Committee includes provision for RF's own costs.

The recommended grant breakdown is as follows:

Element	Amount (£)
First loss finance	600,000
Evaluation	108,000
CDFI support costs	60,000
Responsible Finance management	20,000
Total	788,000

Financial Information

Year end as at 31st December	2021	2022	2023
	Signed accounts £	Signed accounts £	Budget £
Income & expenditure:			
Income	185,364	258,931	351,695
- % of Income confirmed as at	100%	100%	54%
Expenditure	(179,480)	(226,155)	(323,386)
Total profit/(loss)	5,884	32,776	28,309
Balance sheet:			
Net assets/(liabilities)	180,907	213,683	241,992
<i>Of which:</i>			
Income & Expenditure reserves	180,907	213,683	241,992
Total reserves	180,907	213,683	241,992
Months' expenditure covered by I&E reserves	12.095	11.342	9.576

14. RF does not have a formal reserve policy but aims to ensure that expenditure matches resources, and that good financial health is maintained. 2021 accounts show reserves equivalent to just over 12 months' expenditure, and this is expected to fall slightly to just over 9.5 months' by end 2023.
15. The primary driver of growth between 2021 and 2023 was membership income with RF gaining 3-5 new members each year. In 2022, RF increased member fees in consultation with its membership to make the organisation more financially sustainable. In 2021 membership fee income was £130k and in 2023 RF expects

this to be over £200k. A 2-year grant awarded by the Impact Investing Institute in 2022 accounts for £30k pa in that year and 2023.

16. The organisation aims to maintain income at £350-370k and aims to recruit new posts to develop membership, project, and investment support posts to the team. 54% of the organisation's income has already been confirmed for 2023.

Recommendation

17. As the umbrella organisation for the CDFI sector, Responsible Finance offers an excellent route for CBT to support both the scaling of affordable credit provision to low-income Londoners as well as the evidence case for further investment in supportive lending. Members saw the scale at which low-income households were turning to unsecured credit in the September 2022 paper and the overall lack of savings held by UK households. Inflation remains high and exclusion from mainstream banking services particularly impacts on poorer Londoners, increasing their risk to the impact of financial shock and to paying a 'poverty premium' for credit. The recommended grant would be catalytic, helping to draw in additional capital to build the responsible credit sector in London.
18. Whilst CBT does not normally fund private companies, officers have reviewed the organisation's Memorandum and Articles of Association and can confirm that there are no issues of potential private benefit, that its objects are focused on membership development and Government engagement, and that it has an appropriate dissolution clause. CBT has precedent of funding work delivered by a private company, for example, through its grants to the Charity Tax Group.

Conclusion

19. It is recommended that the Funding Committee approve a grant of £788,000 over two years (£724,000; £64,000) to Responsible Finance to cover the costs of a first-loss allocation across three Community Development Finance Institutions, cost-benefit, and impact assessment, as well as management costs.

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Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: Strategic Initiative: London's Giving – Resource Hub (Ref: 20540)	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Decision
Report Author: Jenny Field, Consultant	

Summary

This paper seeks Funding Committee approval of a grant of £615,000 to London Funders to build on its existing London's Giving work by establishing a Resource Hub to support the development and capacity of place-based giving schemes (PBGS) in London.

This paper follows from the report presented to the December 2022 meeting of the Funding Committee which set out proposals for the Resource Hub, informed by scoping research undertaken by Deborah Xavier, Freelance Consultant, in consultation with PBGS in London and other relevant stakeholders. At that meeting, 'in principle' approval was given to support the establishment and development of the Resource Hub over the next ten years which would build, amplify, increase, and develop the range and depth of support currently available under the London's Giving initiative. Officers were asked to work with London Funders (the current host of London's Giving and future host of the Resource Hub) to draw up a fully costed budget for the first three years of its operation, to be brought to this Committee for approval. This paper is the outcome of this work.

Recommendations

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Approve a grant of £615,000 over three years to London Funders (charity no: 1116201) to develop a Resource Hub to support the development of place-based giving schemes in the capital.

Main Report

Background

1. City Bridge Trust has been a long-term supporter of place-based giving schemes (PBGS) in London, through funding to individual local schemes, combined with development and capacity building support for them through the London's Giving strategic initiative, hosted by London Funders. These funding streams support the Bridging Divides funding strategy (in particular, the strategic aim to increase the quality and scale of giving) as well as the joint BHE & City Corporation Philanthropy Strategy (in particular, the strategic aims of supporting and raising awareness of high quality giving in the capital) and the Bridging London Strategy of BHE (in particular, to act as a catalyst for positive change in London).

2. A time-limited, strategic development fund for PBGS (over and above the funding available under CBT's open grant programmes) was also established during last year, co-designed by a Task and Finish Group. This funding strand is now closed with 14 grants being awarded (from a total of 19 applications) totalling £3,180,143.
3. The Task and Finish Group also oversaw the commissioning of research scoping the feasibility of a Resource Hub to build on the existing work of London's Giving, hosted by London Funders. It was envisaged that the Hub would amplify and strengthen CBT's investment in London's PBGS movement and raise the movement's profile, reach, and influence in order to make London a more equitable and inclusive city.
4. It was the view of the Task and Finish Group that London Funders should remain the logical home for the Hub, at least for its first 3 years of operation.
5. The findings of this research were presented to the Funding Committee in December 2022, when 'in principle' approval was given to the establishment of this proposed Resource Hub over the next ten years, subject to detailed costings for its initial three years being brought to this Committee for approval. This report sets out those detailed costings.

About London's Giving

6. CBT's engagement with place-based giving schemes (PBGS) began 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 several emerging schemes as Strategic Initiatives.
7. Inspired by the success of Islington Giving, CBT has also been supporting the promotion and development of PBGS since February 2014. This overarching work launched as [London's Giving](#) in February 2015 and is hosted and promoted 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.

About Place-Based Giving Schemes

8. 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 local resources and assets (money, knowledge, and skills) for the benefit of those communities.
9. 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 mission and principles, developed with the London's Giving network of PBGS:

- a. to connect people and foster collaboration, bringing together residents and the public, private and the voluntary sectors;
- b. to empower local people to take action on the issues that affect them; and,
- c. to speak up about and challenge inequality.

10. Currently, there are 13 active¹ PBGS in London with a further two in development. The latest impact report can be found [here](#). The report highlights that between April 2017 and March 2020 the schemes collectively:

- a. Raised £9.99m (of which £5.5m was in 2019-20)
- b. Dispersed grants to the value of £8.71m (of which £3.9m was in 2019-20)
- c. Raised £552,446 in-kind income
- d. Enabled volunteering with an estimated value of £1m.

11. Many of the groups supported by PBGS fall under the radar of other funders, such as CBT. More important, however, than these monetary and 'in-kind' benefits is the added value that PBGS create through collaboration and trust and through the sharing of new approaches and programmes that help to achieve social change.

Resource Hub Proposal

12. Whilst PBGS within the London's Giving network continue to innovate – be this through participatory grant-making, community-led investment, or long-term partnerships with business - securing the sustainable core revenue necessary to underpin this activity remains a major challenge for many schemes. A significant role for the proposed Resource Hub will be to develop fundraising capacity and expertise within the network to help them build connections, innovate, and create a genuine step change in local giving.

13. The scoping report identified three core areas of focus for the Resource Hub:

- a. To drive reach, establishing new PBGS and helping emerging and established PBGS to achieve their potential.
- b. To build the profile of the movement enabling cross-London relationships to accelerate growth and influence.
- c. To provide challenge and support, innovation, and influence, to ensure a greater collective impact on the lives of Londoners.

14. The proposed activities that the Hub will focus on during its first 3 years can be found in Appendix A. However, it is also recognised that needs may well change during this period both from within the network and because of external factors. It will therefore be important that a flexible approach is taken so that the Hub is able to be agile and responsive to changing needs.

¹ All of these schemes, plus the 2 in development, applied to the Strategic Development Fund, with all but one being successful or recommended for funding.

15. It is envisaged that these activities will support the delivery of the following indicators of success for the Hub that have been identified by the network for its first 3 years:

- a. A vibrant, collaborative network with the right mechanisms in place to actively share learning within the network as well as more widely.
- b. PBGS are seen as a beacon of excellence in their participative giving practice.
- c. PBGS achieve a stronger profile and track record as the 'go-to' organisations for hyper-local distribution of funding.
- d. PBGS have diversified their funding model, including greater success in attracting funding from London's corporate sector.
- e. PBGS in London are modelling their commitment to equity and justice through their leadership as well as through the way they work.
- f. PBGS continue to innovate and pilot approaches which can challenge and influence the wider funding system.

Cold Spots

16. A separate report looking at those boroughs that are 'cold spots'² for CBT (and which are also cold spots for other funders) is included in the non-public papers of today's meeting. The report recommends targeted engagement by the Funding team with these boroughs.

17. PBGS have the potential to play an important role in addressing cold spots, although this should be qualified by recognising that the characteristics of cold spot boroughs – very little voluntary sector infrastructure support; a relatively large number of small groups and relatively high levels of disadvantage – also provide major challenges for establishing new giving schemes. Nevertheless, work in cold spot boroughs is amongst the priorities for the Resource Hub as set out in the table at Appendix A.

18. One of the Funding Managers, Maria Hughes, is acting as a dedicated Team Lead for PBGS in London and the wider London's Giving Network, as part of her generic duties. If a similar role is identified to lead on cold spots development work, it will be important that a joined-up approach is adopted to ensure most effective use of resources and to avoid duplication of effort.

Budget

19. The proposed resourcing for the Resource Hub is a mix of flexible 'hands on' support alongside strategic leadership and resource which can catalyse and sustain stronger collective initiatives within the place-based giving community. The three key areas that have been identified are:

- a. A new post of Hub Director (0.8-1 FTE), employed by London Funders and line managed by the CEO. This role will be supported by the existing Director of Place position within London Funders.

² That is, boroughs that have received a relatively lower amount of funding from CBF during the past 5 years, relative to their deprivation ranking on the 2019 Index of Multiple Deprivation

- b. Communications and administrative support, either via a dedicated post or flexible support model.
- c. Consultancy budget for internally led and external consultancy; and joint project costs (e.g., collective campaigns, training, resource development etc).

20. In addition, as recommended by the feasibility study, there will be some staffing costs allocated to London Funders to provide leadership on wider place-based thinking and practice. London Funders will continue to advocate the value of place-based giving in London's funding eco-system and provide opportunities to convene members to share learning about place-based giving (for example via the annual Festival of Learning and ongoing learning programme).

21. The proposed budget is set out in the table below:

	Year 1 (24/25)	Year 2 (25/26)	Year 3 (26/27)
Expenditure	Amount (£)	Amount (£)	Amount (£)
Salaries and overheads			
Hub Director (1FTE)	55,000	57,750	60,638
Comms & Engagement (0.4FTE)	14,000	14,825	15,271
Director of Place (London Funders) (0.4FTE)	25,375	26,644	27,976
Employer's National Insurance	10,381	10,914	11,427
Employer's Pension contribution	9,438	9,922	10,388
Office costs (desk hire, @5k p.a FTE)	8,000	8,000	8,000
Governance and finance support	1,600	3,680	3,864
Total salaries & overheads	123,794	131,735	137,564
Direct costs			
Communications/website	2,500	800	800
Design and print	1,500	1,575	1,750
Meetings and events	2,225	2,336	2,453
Insurance	200	210	221
Website development & hosting	3,000	3,150	3,308
Staff development	1,250	1,313	1,378
Staff travel & subsistence	600	630	662
Consultancy costs ³	60,000	63,000	66,150
Total direct costs	71,275	73,014	76,771
TOTAL	195,069	204,748	214,335

³ This covers: (i) Internal consultancy for PBGS development support; (ii) External consultancy to include expertise in EDI Learning Partner; Marketing & Comms; Fundraising; Website Design & Management; Joint collaborations

22. Funding for London's Giving is currently in place until 31 March 2024. It is therefore proposed that this budget will commence from 1 April 2024.

Oversight of the Hub

23. To succeed, it is vital that the Hub is independent, inclusive, enabling and evolving. With this in mind, a cross-sectoral Steering Group will be established within 3 months of the Director being recruited to bring together fresh and independent voices to oversee this new phase of place-based giving. Whilst closely aligned to London Funders, the new Steering Group will enable greater representation of those involved in PBGS to shape the direction of the Hub, providing support, strategic oversight, and scrutiny during its initial phase. The detailed nature of the Steering Group and its terms of reference would be developed once the Director is in post.

Learning & Evaluation

24. The Hub will build on the work of Rocket Science, working with local schemes to collect and collate both quantitative and qualitative data to share learning and showcase the collective impact of London's Giving as a whole.

25. However, officers are also of the view that it will be important that an independent evaluation of the effectiveness of the Hub is undertaken for CBT. It is proposed that this is commissioned through the CoLC's usual procurement processes and resourced from the BHE Local Risk budget.

26. It will be important that this independent evaluation and the Hub's impact measurement are mutually complementary.

Financial Information

27. The Financial Information in the table below related to London Funders, as host for the Resource Hub.

28. The substantial increase in income and expenditure forecast for 2023 and budgeted for 2024 is almost entirely due to the Propel initiative. Stewarded by London Funders, Propel is a major partnership long-term funding programme involving a number of funders (including CBT) and equity partners, focused on enabling civil society groups and organisations to explore, develop and lead collaborative approaches to tackle some of the capital's biggest challenges. London Funders has received several grants (including from CBT) towards the additional costs of its co-ordination and administration of this major multi-funder collaboration.

29. In 2022, London Funders' reserves policy was to hold 6 months of total expenditure as free reserves and the audited accounts for 2022 show that free reserves were slightly below that target. As a result of Propel, London Funders' Board has reviewed the policy which now aims to hold 6 months of core costs in free reserves. Included in its calculation of core costs, are all salary costs, including those of restricted funded project staff for whom the funding does not include

redundancy/notice costs, together with the wind down costs of those projects to enable them to meet their legal obligations. It is forecast that actual free reserves will reach 86% of the target in 2023 and 95% of the target in the 2024 budget.

Year end as at 31st March	2022 Signed Accounts £	2023 Draft Accounts £	2024 Budget £
Income & expenditure:			
Income	408,541	882,644	979,278
Expenditure	(414,552)	(786,059)	(793,650)
Surplus/(deficit)	(6,011)	96,585	185,628
Reserves:			
Total restricted	15,135	13,421	194,872
Total unrestricted	199,574	297,873	302,049
Total reserves	214,709	311,294	496,922
Of which: free unrestricted	199,574	297,873	302,049
Reserves policy target	207,276	346,364	317,946
Free reserves over/(under) target	(7,702)	(48,491)	(15,897)

Conclusion

30. There is a growing belief in the importance of place, not least within Government and amongst think tanks and funders, and London Funders has been actively working to centre an interest in place in its wider work.
31. The pandemic brought the importance of place into even sharper relief as we all spent more time in our neighbourhoods. During the pandemic, several PBGS played an important role in getting funding and resources to where they were most needed.
32. The proposals for the Resource Hub present an exciting opportunity to build on and amplify the existing work of London's Giving and take it to the next level. The proposals are welcomed amongst local schemes who have been widely consulted in their shape and design.
33. CBT's funding and wider support for London's Giving and the Resource Hub, alongside its funding of local PBGS, supports the 3 main strategies that underpin the work of BHE:
 - a. The Bridging Divides funding strategy, in particular, its mission to reduce inequality and increase the quality and scale of giving in London.
 - b. The joint Philanthropy Strategy of CoLC and BHE, in particular, to support and raise awareness of high quality giving in the capital.
 - c. The BHE Strategy, Bridging London, in particular, its aim to act as a catalyst for positive change in London.

Appendices

- Appendix A – Proposed Activities of the Resource Hub

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Appendix A

Proposed Activities of the Resource Hub

1.1 Driving Innovation & Influence	
Leadership, voice and challenge	<ul style="list-style-type: none"> • London Funders provide thought leadership on place, linking PBGS to wider community of funders (e.g. via existing and emerging coalitions on place, enhanced learning programme and developing links beyond London) • Provide advocacy on value of PBG in London’s funding eco-system through existing workstreams, maximising new opportunities to promote the model (e.g. via mayors, London Councils)
Participatory practice	<ul style="list-style-type: none"> • Hands on support to develop and implement participatory grantmaking (“PGM”) practice, utilising existing expertise from within the network • Bringing practice from beyond network (e.g. PGM community) into London’s network, commissioning resources to fill any identified gaps • Extending learning and advocacy to help develop PBG as a centre of excellent for participatory practice
1.2 Achieving Reach	
Start-up, cold spots and trouble shooting	<ul style="list-style-type: none"> • Convening clusters of staff leading new and emerging schemes for more targeted support and peer learning • Coaching and leadership support for those at early stage of the journey
PBGS specific support for developing PBGs (1 to 1 support)	<ul style="list-style-type: none"> • Fundraising capacity building – via skills development, shared resource to deploy on FR research and prospecting • Bespoke support along the PBG journey (eg recruitment, evaluation, governance) provided in-house or externally
Network and peer support	<ul style="list-style-type: none"> • Develop the Director’s network with the new focus on inspiration and provocation

	<ul style="list-style-type: none"> • Reinvigorate the Chairs Network with additional capacity to provide more direct support and learning opportunities to the Chairs group • Support the testing of communities of practice for staff specialising in PGM and fundraising initially
Resources, toolkits, directory of suppliers	<ul style="list-style-type: none"> • Create new online resources and presence for hosting shared toolkits and directories
1.3 Building Profile	
Business engagement	<ul style="list-style-type: none"> • Develop and lead joint campaigns to potential London-wide/sub regional corporate funders & supporters • Develop and implement business engagement strategies tailored to individual boroughs • Dedicated resource for researching and developing potential business links
Joint working – e.g. Collective advocacy/campaigns	<ul style="list-style-type: none"> • Resources to commission collective marketing and advocacy campaigns which the whole network can utilise and benefit from • Develop the right mechanisms to facilitate joint working (eg via sub groups)
Marketing & Comms	<ul style="list-style-type: none"> • Develop communications strategies for different audiences and a stronger collective case for support
Evaluation	<ul style="list-style-type: none"> • Structured programme to translate learning to those at different stages of the PBG journey, with consistent mechanisms for sharing learning across the network
1.4 Equity & justice^[1]	
Learning and action	<ul style="list-style-type: none"> • A dedicated programme of work to make Equity and Justice a more intentional part of the Givings ‘core business’. This might include appointing a learning partner or internal resource

^[1] The scoping report identified EDI but we have amended the terminology here in response to wider discussions within the network and London Funder’s own approach to equity and justice

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Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: Grant Funding Activity: Period Ended 24 August 2023	Public
Report of: Sacha Rose-Smith, Chief Funding Director	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 Funding Committee in June 2023 through to 24 August 2023; the remaining 2023/2024 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 Funding Committee's approval for 1 grant between £500,000 and £1,000,001.

Recommendations

It is recommended that the Funding Committee of the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Receive this report and note its contents; and
- ii) Approve one grant as recommended in Appendix 3.

Main Report

Budget and Applications Update

1. There have been 268 grants awarded from the main grants programmes to date in 2023/24 (since 1 April 2023) with the net grant spend £30.4m. This leaves the remaining budget for 2023/24 at £72.3m after other costs and allocations and before grants recommended to this Committee of £16.9m, alongside a further grant recommended in principle (which will not be committed until conditions are met) totalling £1.0m. Should these grants be approved, there will be £130.9m available in the designated fund for grant making after this Committee.
2. In addition to the grants listed below, 8 applications were withdrawn since the last meeting to 24 August 2023.
3. 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**.

Recommendations to Approve Between £500k and £1,000,001

4. The Funding Committee's approval is requested for one Bridging Divides application of between £500k and £1,000,001 within this report. A copy of the corresponding grant assessment reports can be found at **Appendix 3**.

Grant Rejections

5. A list of all rejections approved in line with the current delegated authority procedure are provided within **Appendix 4**.

Grant Variations

6. Variations to the grants outlined have been agreed by the Managing Director of BHE, the Chief Funding Director or a Funding Director, in line with the delegated procedure for the amendment of grants. Details of all variations are provided at **Appendix 5**.

Funds approved under Delegated Authority

7. The details provided at **Appendix 6** advises the Funding Committee of funds approved under delegated authority and urgency procedures from May 2023 to 24 August 2023.

Conclusion

8. This report provides details of grant funding activity since the last meeting of the Funding Committee in June 2023 and seeks the Funding Committee's approval for 1 grant between £500k and £1,000,001 within this report.

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 for Approval between £500k and £1,000,001
- Appendix 4: Grant Rejections
- Appendix 5: Grant Variations
- Appendix 6: Funds Approved under Delegated Authority or Urgency Requests

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Appendix 1: Budget for Designated Grant-making and Restricted Funds to date (23/24 financial year)

<i>Date of this report: 24/8/23</i>	Designated Fund - Bridging Divides, Cornerstone, Bridge Fund	Restricted funds - LCRF, TFL, RRR2	TOTAL
£'000			
Funds balance at 1 April 2023 per draft accounts	179,956	0	179,956
<i>Already earmarked for projects</i>	(399)	0	(399)
Funds available for grantmaking at 1/4/23	179,556	0	179,556
Grants awarded 2023/24			
<i>Grants reported to/approved by Committees to date</i>	(14,603)	0	(14,603)
<i>Grants approved under delegated authority since June 23 Cttee</i>	(15,860)	0	(15,860)
TOTAL AWARDED TO DATE OF REPORT	(30,463)	0	(14,603)
Number of grants awarded	268	0	268
Write backs, variations & revocations financial YTD	(77)	0	(77)
Number of grants revoked, varied or written back	7	0	7
Other costs incl. staff costs associated with £200m uplift	(96)	0	(96)
Conditional grants*	(40)	0	(40)
Stepping Stones loan awarded under Bridging Divides*	(50)	0	(50)
TOTAL SPENT/ALLOCATED TO DATE	(30,726)	0	(14,826)
Subtotal: available at the date of this report	148,830	0	164,731
Total grants recommended for approval 11/9/3	(16,854)	0	(16,854)
Grant recommended for in principle approval 11/9/23	(1,049)	0	(1,049)
Remaining funds available	130,928	0	146,828
2023/24 budget summary			
Approved Grants Budget 2023/24	101,500	0	101,500
Add non-grant spend budget 2023/24	1,400	0	1,400
Budget for 2023/24	102,900	0	102,900
<i>Grants awarded to date of this report net of revocations</i>	(30,386)	0	(30,386)
<i>Other costs and allocations</i>	(186)	0	(186)
Budget available to Committee at report date	72,328	0	72,328

*Awarded in 21/22 but remain in this report for 23/24

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)

								Enf						
								59						
								Hrw	Brn	Hgy	Wth			
								199	184	37	45			
Hdn	Elg	Brt	Cmd	Isl	Hck	Rdb	Hvg							
151	88	49	132	28	7	160	179							
Hns	Hms	Kns	Wst	Cty	Tow	Nwm	Bar							
95	96	122	134	208	27	12	5							
								Rch	Wns	Lam	Swr	Lsh	Grn	Bxl
								297	173	42	43	35	60	190
								Kng	Mrt	Crd	Brm			
								270	214	102	230			
								Stn						
								227						

Main grants from start of Bridging Divides (September 2018) to Committee date (excluding LCRF) – rounded to nearest £100K:

								Enf						
								£700,000						
								£2,000						
								Hrw	Brn	Hgy	Wth			
								£700,000	£1,800,000	£1,300,000	£1,100,000			
								£3,000	£8,000	£5,000	£4,000			
Hdn	Elg	Brt	Cmd	Isl	Hck	Rdb	Hvg							
£500,000	£800,000	£1,000,000	£4,500,000	£4,600,000	£4,200,000	£400,000	£200,000							
£2,000	£2,000	£4,000	£13,000	£18,000	£11,000	£1,000	£1,000							
Hns	Hms	Kns	Wst	Cty	Tow	Nwm	Bar							
£500,000	£1,100,000	£1,600,000	£2,900,000	£1,600,000	£3,800,000	£1,900,000	£600,000							
£2,000	£6,000	£10,000	£11,000	£6,000	£12,000	£5,000	£57,000							
								Rch	Wns	Lam	Swr	Lsh	Grn	Bxl
								£1,100,000	£1,500,000	£4,200,000	£2,900,000	£1,600,000	£600,000	£400,000
								£5,000	£4,000	£13,000	£9,000	£5,000	£2,000	£1,000
								Kng	Mrt	Crd	Brm			
								£600,000	£600,000	£800,000	£800,000			
								£3,000	£3,000	£2,000	£2,000			
								Stn						
								£600,000						
								£3,000						

KEY

Total £

Per 1000

Main Grants for this Committee – rounded to nearest £100K:

						Enf	
						£0	
						£0	
				Hrw	Brn	Hgy	Wth
				£100,000	£100,000	£200,000	£300,000
				£1,000	£0	£1,000	£1,000
Hdn	Elg	Brt	Cmd	Isl	Hck	Rdb	Hvg
£0	£100,000	£100,000	£500,000	£400,000	£500,000	£0	£0
£0	£0	£0	£1,000	£2,000	£1,000	£0	£0
Hns	Hms	Kns	Wst	Cty	Tow	Nwm	Bar
£100,000	£300,000	£400,000	£200,000	£400,000	£400,000	£100,000	£0
£0	£1,000	£2,000	£1,000	£1,000	£1,000	£0	£0
	Rch	Wns	Lam	Swr	Lsh	Grn	Bxl
	£0	£100,000	£400,000	£500,000	£300,000	£100,000	£0
	£0	£0	£1,000	£1,000	£1,000	£0	£0
		Kng	Mrt	Crd	Brm		
		£0	£100,000	£0	£100,000		
		£0	£1,000	£0	£0		
			Stn				
			£0				
			£0				

KEY
Total £
Per 1000

Appendix 3: Grant Recommendations for Approval between £500k-£1,000,001

MEETING: 11 SEPTEMBER 2023

REF: 20365

ASSESSMENT CATEGORY: Bridging Divides - Infrastructure funding: capacity building and representation

Money4You

Amount requested: £650,000

{Revised request amount: £552,563.13}

Amount recommended: £552,700

Adv: Lorna Chung

Base: Barnet

Benefit: London-wide

Purpose of grant request: Funding is requested towards Money4You's AVOCADO fundraising capability and financial sustainability programme for BAMER organisations in London.

The Applicant

Money4You is a registered CIO (no. 1157549) and infrastructure body, founded to eradicate economic inequalities through delivering financial education, entrepreneurship and capacity building training in the UK and sub-Saharan Africa. The founding CEO had a banking career before developing her interest in financial education and young people's money-management skills. She started her work through a money education club at a local primary school, which led to invitations to deliver similar schemes in secondary education and with local community organisations. Through her role as Chair of the Black Fundraiser's group at the Institute of Fundraising, she saw evidence of disengagement from black fundraisers which, at root, she believed was reflective of a lack of capacity. M4Y offers a variety of valuable services to BAMER-led charities including Brunch Briefings, Bootcamps and BAMER HUB, an online platform with organisational development resources.

Background and detail of proposal

Continuation funding is requested towards M4Y's AVOCADO programme, intensive financial capacity building support delivered by dedicated consultants. In 2016, and with seed funding from the Tudor Trust, Money4You launched Avocado with its partners Race on the Agenda and BlackFundraisers UK (the latter a network hosted by the Institute of Fundraising). AVOCADO seeks to enhance the sustainability, financial capability, and leadership of BAMER charities.

Through the AVOCADO programme, M4Y will deliver intensive support to over 20 organisations per year. The programme is delivered by consultants and is a mixture of one-to-one support, workshops and events. It enables organisations develop a better understanding of their strengths and provides tailored areas of development to improve sustainability. Participant organisations are typically small, with incomes of under £250,000 per year. Each programme participant receives support over 9-10 months from one of the charity's four consultants who are all affiliated to the Institute of Fundraising. Work covers governance, planning, financial capability, and fundraising to maximise an organisations capability. Example sessions include financial management and reporting, project design and development, building an income generation strategy and bid writing masterclasses. Money4You is in the process of accrediting AVOCADO and expects to finalise CDP accreditation in the coming months. AVOCADO participants are also given the opportunity take part in M4Y's annual 'Dragons Den' event. This is a light-hearted event, where organisations

pitch to a panel of funders for grants and engage in discussion around the rationale behind the award. City Bridge Trust funded the grants in 2022 with £100k and will support the 2023 event at the same level.

Funding is requested towards two salaries a Programme Manager (0.4FTE) and Project Officer (0.8FTE), consultants and sessional workers, and contributions towards events and promotional materials. Salaries requested are slightly greater than the trusts standard approach of funding 1FTE. Salaries requested are proportional to M4Y's original three-year grant and are in line with the approach taken to funding infrastructure organisations through other trust programmes. Salary funding is recommended at this level in recognition of the value of equity-led infrastructure organisations, and the particular challenges they face in accessing funding.¹

Demand for M4Y's services continues to increase, particularly with the closure of the Small Charities Coalition in 2022 and the Foundation for Social improvement earlier in 2023. There are also longer-term trends of BAMER-led infrastructure organisations closing. In 2010, there were over 50 BAMER-led infrastructure organisations in England. However, the end of specialised funding in 2011 has saw many closures in the sector, including 17 of the largest organisations (along with additional smaller ones).² Fundraising support and financial management guidance, such as that offered by M4Y, continue to be of particular importance for BAMER-led organisations in the aftermath of the pandemic and during the cost-of-living crisis. Research shows half of Black-led charitable organisations have not received any support to help mitigate the cost-of-living crisis. Furthermore, over four in ten Black charitable organisations need over 50% of additional revenue because of the crisis and only one in four has over two months expenditure in reserves.³

Financial Information

In 2022 (financial year ending 31st December), City Bridge Trust was a majority funder of Money4You, with the organisation receiving £50k for its Bridging Divides grant and a further £100k towards its Dragons Den event via Strategic Initiative. Though City Bridge Trust will be supporting Dragons Den 2023 with a grant of the same size (£100k), the trust will not be a majority funder in 2023 as the organisation has already secured £218k in funding for the year from other sources. Income is forecast to rise to £579k in 2023 and £8748k in 2024. These figures include the award of this grant request. This rise in income is also in part due to an anticipated award from Pathways Fund (£150k) to distribute cost of living crises grants starting in October 2023.

Money4You's free reserves target is to hold three months core expenditure, which it has provided values for in the table below. At year end 31/12/22 M4Y held £16k in free reserves which equates to just over one month's core expenditure for that year. It had an additional £21k designated for its 4Entrepenurs programme (designed to kickstart small businesses led by young people and women in underprivileged communities and developing nations) as this area of work was underfunded throughout the year. The amount was designated to cover shortfalls in income for this project in 2023.

¹ Capacity to Change: The state of London's voluntary sector infrastructure organisations in the 2020's (2023). Page 12. Available at: <https://www.resourceforlondon.org/capacitytochange>

² 360 Giving (February 2023) 'Sector Infrastructure Funding Analysis' Available at: <https://www.threesixtygiving.org/infrastructure-funding/>

³ Do it Now Now (May 2023) 'A Desert without Resources: 2023 Cost of Living Report' Available at: <https://www.doitnownow.com/blog/a-desert-without-resources-cost-of-living-report>

Improving its reserves position is a priority for senior leadership and trustees. Its plan to do this is outlined in its 2023 income generation strategy, which includes priorities such as diversifying income to include corporate, individual giving, trading and digital and enhancing its systems and processes to maximise fundraising potential with the aim of raising unrestricted funding for its reserves. Forecast unrestricted surpluses in 2023 and 2024 will move it closer to achieving its target reserves position.

Year end as at 31st December	2022	2023	2024
	Signed Accounts	Forecast	Budget
	£	£	£
Income & expenditure:			
Income	260,346	578,889	748,750
Expenditure	(225,360)	(500,000)	(725,000)
Surplus/(deficit)	34,986	78,889	23,750
Reserves:			
Total restricted	64,427	123,594	137,844
Total unrestricted	36,961	35,833	45,333
Total reserves	101,388	159,427	183,177
Of which: free unrestricted	16,111	35,833	45,333
Reserves policy target	40,087	95,000	118,750
Free reserves over/(under) target	(23,976)	(59,167)	(73,417)

Funding history

ID	Type	Meeting Date	Decision
21234	Strategic Initiatives	11/09/2023	£100,000 towards Money4You's 2023 Dragons' Den award scheme, with funding restricted to groups delivering work of benefit to Londoners 10% of the awarded funds to cover Money4You's delivery costs and oversight.
20493	Anchor EOI	19/05/2023	Due to the high volume of applications received, other organisations were considered to more closely meet the priorities of the programme.
IPP175	Inflationary Pressures Payment	06/03/2023	£5,000 inflationary pressures payment
19581	Strategic Initiatives	26/09/2022	£100,000 towards Money4You's 2022 Dragons' Den award scheme, with funding restricted to groups delivering work of benefit to Londoners. 10% of the awarded funds to cover Money4You's delivery costs and oversight.
17867	COVID19 London Community Response Fund (Wave 3)	26/11/2020	Your officer felt the application submitted was over ambitious
15945	Bridging Divides	08/07/2020	£150,000 over three years (3 x £50,000) towards Money4Youth's Avocado fundraising capability and financial sustainability programme for BAMER organisations in London.
16614	COVID19 London Community Response Fund	08/07/2020	£12,500 towards 3 months of expenditure, as outlined in your application.
15414	Bridging Divides	30/01/2020	Following discussion with your Officer, the charity has withdrawn its application and re-applying at a later date.

Recommendation

AVOCADO+ is increasingly important against the backdrop of declining BAMER-led infrastructure organisations and the challenges that the BAMER sector faces in the wake of the pandemic and cost of living crisis. After discussion during the assessment process, Money4You submitted a revised budget reducing requested salary funding to be proportional to its original grant and proportional to time spent delivering the programme.

£552,700 over five years (£100,000; £105,000; £110,300; £115,800; £121,600) towards Money4You's AVOCODO programme for BAMER organisations in London.

Appendix 4: Grant Rejections Approved under Delegated Authority

Funding Request	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
20616	Connected Youth CIC	03/07/2023	£10,000	This application was lacking detail in key areas of the organisation and its work, especially track record and how the proposed activities would help strengthen voice or leadership in the young people engaged.	John Mulligan
20215	CRiBS Charitable Trust	26/07/2023	£263,830	The proposal does not meet any of the stated aims of the funding theme for Children and Young People.	Gerard Darby
20582	Comfort Cases UK	13/07/2023	£30,000	This area of work does not fit under the current priorities set for the Support children and young people funding strand or other funding programmes.	Cecile Hyafil-Guillerme
20369	Caius House	19/07/2023	£125,028	Whilst the project has strengths, the project is not considered a strong enough fit with CBT's criteria and does not sufficiently demonstrate how it meets the needs of London's most vulnerable young people.	Lillie Swift
20375	RSPCA London East Branch	31/05/2023	£21,900	This application does not meet funding priorities under the Small Grants Programme.	Anneka Singh

19865	Age Exchange	24/07/2023	£165,670	The application proposes to run two distinct projects, an employability project for adults with learning disabilities and a therapeutic group for adults with learning disabilities and dementia. The application did not provide sufficient evidence of a track record of working with people with learning disabilities and delivering employability programmes.	Natalia Griffiths
20341	BLOSSOM ASA	11/08/2023	£100,000	This application is recommended for rejection as the grant request to the Trust is disproportionate to income.	Lara Rufus-Fayemi
20532	Southbank Sinfonia	30/06/2023	£2,400	The organisation can self-fund the project.	Annabel Bennett
20543	Up 'N Away	09/06/2023	£30,000	The request was received under the Children & Young People programme, but the proposed work does not focus on any of CBT's target groups. Additionally, the bid only requests food costs, which falls outside CBT's stated funding policy.	Kerry Luker
19968	British Albanian Kosovar Council (BAKC)	19/07/2023	£106,776	Based on the financial information provided by the applicant the assessing Funding Manager has not been assured that the organisation's financial management is currently sufficiently robust.	Ben Banks
19986	Waltham Forest Race Equality Council	19/07/2023	£115,304	Based on the financial information provided by the applicant the assessing Funding Manager has not been assured that the organisation's financial management is currently sufficiently robust.	Lou Errington

20248	Railway Children	01/08/2023	£405,125	Funding is not recommended because the proposal risks duplicating statutory responsibilities.	Abi Sommers
20304	Salmon Youth Centre in Bermondsey	30/06/2023	£90,000	The proposed work does not fit under City Bridge Trust's existing funding strands	Dipali Chandra
20270	Iqra Learning Centre	31/05/2023	£159,250	This work was to be carried out in Chelmsford, Essex and as such does not meet the geographic criteria of City Bridge Trust.	Ben Banks
20208	Friends of Barham Library	10/07/2023	£18,000	The organisation has sufficient reserves to self-fund this work.	Lorna Chung
20291	Peter Jones Foundation	30/06/2023	£35,818	Funding is not recommended as the proposed activities do not align sufficiently well with the Trust's priorities for mental health support. The applicant organisation has no track record of providing mental health or SEND services.	Lara Rufus-Fayemi
20189	The Arts Depot Trust Limited	24/05/2023	£0	The building is being potentially demolished in next 2 years and therefore cannot receive capital funding.	Lydia Parr
20183	The United Goal Ltd	10/07/2023	£1,000	The project seeking grant funding has been poorly planned and is recommended for rejection.	Sheena Etches
20306	Diana Award	15/07/2023	£99,937	Project is not considered a strong enough fit with CBT's criteria and does not sufficiently demonstrate how it meets the Voice and Leadership programme.	Kristina Glenn

20239	Jewish Care	27/07/2023	£269,600	The majority of the application proposes to deliver activities that people are required to pay for in order to attend. Although there is a process in place for people to apply for funding to cover this cost, it is felt that this does not sufficiently remove barriers for all those who may feel unable to afford it. As such this does not meet the Trust's policy to only fund activities that are accessible to attend. For services/activities that are free, the organisation looks to have sufficient funds to pay for the work itself.	Kate Halahan
20078	The Nehemiah Project	31/05/2023	£200,000	Based on the financial information provided by the applicant, reassurance has not been provided that the organisation's management of its finances is currently sufficiently robust.	Kerry Luker
		TOTAL	£2,249,638		

Appendix 5: Grant Variations

1. The Foundation for Social Improvement (FSI)

On 09/03/2022 a grant of £67,200 was awarded to The Foundation for Social Improvement (FSI). On the 15th of March 2023, FSI announced that the organisation would be winding up. CBT collaborated with the organisation to ensure that an orderly wind up could happen, releasing some the remaining grant (£6,000) towards costs associated with the process. FSI has reported on the spending of the released grant and now the balance of the grant needs to be revoked.

Recommendation

That a sum of £ 45,142.50 out of the grant of £67,200 to The Foundation for Social Improvement (FSI) be revoked.

2. Sported Foundation

On 26/03/2020 a grant of £275,000.00 was awarded to Sported Foundation. It has accrued an underspend of £2,090.00. As the project has now ended, the monies cannot be carried forward. Sported has not identified plans to use the funds which would meet the outcomes of the grant award.

Recommendation

That a sum of £2,090.00 out of the grant of £275,000.00 to Sported Foundation be written back.

3. Stonegrove Community Trust

On 04/10/2021 a grant of £3,600.00 was awarded to Stonegrove Community Trust to carry out an access audit and disability awareness training. There is an underspend of £220.00 on this grant, that will not be paid to the grantee as the work is complete.

Recommendation

That a sum of £220.00 out of the grant of £3,600.00 to Stonegrove Community Trust be revoked.

4. Time and Talents Association

On 26/09/2019 a grant of £2,000.00 was awarded to Time and Talents Association for the purpose of an eco audit and the associated costs. After all activities have taken place a balance of £800.00 remains, therefore a revocation of the remainder is recommended.

Recommendation

That a sum of £800.00 out of the grant of £2,000.00 to Time and Talents Association be revoked.

5. Kentish Town City Farm

On 07/12/17 a grant of £2,600 was awarded to Kentish Town City Farm for an eco-audit (6.5 days). The audit and follow up has taken place with a balance of £200 remaining.

Recommendation

The remaining £200 out of the grant of £2,600 to Kentish Town City Farm be revoked.

6. East African Association

On 05/12/2022 a grant of £27,800.00 was awarded to East African Association. Due to charity governance concerns made apparent after the grant offer was made and misinformation received from EAA, this grant offer is revoked.

Recommendation

That a sum of £27,800.00 out of the grant of £27,800.00 to East African Association be revoked.

7. Sudbury Neighbourhood Centre

On 21/11/2022 an Inflationary pressure payment to Sudbury Neighbourhood centre was revoked as the organisation closed in early 2023, after the payment was agreed.

Recommendation

That the inflationary pressure payment of £1,000 to Sudbury Neighbourhood Centre be revoked.

Appendix 6: Funds Approved under Delegated Authority or under Urgency (May to 24 August 2023)

Funding Request	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
19793	10 Windsor Walk CIC	26/07/2023	£145,775 over five years (£26,495; £26,892; £29,582; £29,908; £32,898) towards specialist and support staff for the therapeutic parent, baby and toddler group for refugees, migrants and asylum seekers; interpreters and translation; the 0.15 FTE Outreach Coordinator, subsistence and travel; and a contribution to core costs of 10WW.	£145,775	Lara Rufus-Fayemi
20175	3 Pillars Project C.I.O.	13/06/2023	£40,000 (2 x £20,000) over two further and final years towards the Operations Manager salary.	£40,000	Lorna Chung
19940	Action West London	14/07/2023	£150,000 over three years (48,500; 50,000; 51,500) towards the salaries of the Positive Transitions Worker and Project Officer, a range of project costs, and a contribution to organisational overheads.	£150,000	Matthew Robinson
19902	Adfam	17/11/2022	£229,400 over five years (5 x £45,880) to support Adfam@Home in London, a remote counselling service for people with a long-term mental health condition resulting from a family member's substance misuse.	£229,400	Lara Rufus-Fayemi
19538	AFC Wimbledon Foundation	21/07/2023	£96,268 over 4 years (Y1 £7,716, Y2 £26,962, Y3 £30,493 Y4 £31,097) for salaries, sessional staff, facility costs and management charges for the older people's health and wellbeing programme.	£96,268	Lily Davies
19729	Anti-Tribalism Movement	26/05/2023	£100,000 over two years (£50,000 x 2) towards core costs including CEO salary (0.4FTE), Project Manager salary (0.5FTE) and a contribution to overhead costs.	£100,000	Lorna Chung
20209	Aphasia Re-Connect	01/08/2023	£50,000 of core funding over five years (£10,000 x5) to cover the annual maintenance costs of a new administration system.	£50,000	Lydia Parr
20264	Ashford Place	26/05/2023	£1,800 (4.5 days) to provide a Refresher Eco Audit.	£1,800	Lydia Parr

20226	Asylos	11/08/2023	£100,000 (£30,000, £30,000, £40,000) towards the costs of production of Country of Origin Information (COI) reports, capacity building of stakeholders and volunteers, and publication of thematic and migration emergency reports to support London Asylum seekers.	£100,000	Hannan Ali
19815	Attend	27/07/2023	£221,697 over five years; (£42,177, £43,232, £44,313, £45,421, £46,554) to support disabled survivors with an Acquired Brain Injury (ABI) in transitioning from hospital discharge to engaging with their communities in a meaningful way.	£221,697	Abi Sommers
19867	Avenues Youth Project	03/11/2022	£170,000 over five years (£45,000, £40,000, £35,000, £30,000, £20,000) as core funding towards salaries and running costs allowing AYP to continue delivering high-quality youth work to their disadvantaged female membership.	£170,000	Lara Rufus-Fayemi
20254	Barnet African Caribbean Association Ltd	30/06/2023	Award £50,000 (£10,000 x 5) towards the Day Centre Manager salary, activities for the service users, and rent for the Centre session.	£50,000	Hannan Ali
20129	Bede House Association	15/07/2023	£2,600 (6.5 days) to provide an eco audit.	£2,600	Lydia Parr
19771	Belong: Making Justice Happen	31/07/2023	£159,800 over three years (£52,000; £53,300; £54,500) for a part-time Creative Psychotherapist (0.6 FTE), part-time Restorative Justice Practitioner (0.4 FTE) and associated costs to contribute to the PLAN A programme in HMPYOI Isis in South East London.	£159,800	Stella Brown
20134	Bench Outreach	21/07/2023	£184,353 over five years (£34,664, £36,050, £37,132, £37,875, £38,632) project grant towards the salary and on costs of a FT advice worker allowing BO to continue delivering high-quality advice work to people experiencing poverty, homelessness, and housing issues.	£184,353	Lydia Parr
20203	BeyondAutism	14/07/2023	£3,600 (9 days) to provide an eco audit.	£3,600	Lydia Parr
19994	Beyond Food Foundation	04/01/2023	£128,210 over five years (£21,000, £23,100, £25,410, £27,950, £30,750) for 0.4 FTE salary of Support and Progression Manager and 0.4 FTE salary of Support and Progression Assistant to support ex-offenders at risk of homelessness to develop skills and secure employment.	£128,210	Lara Rufus-Fayemi
20224	Big Red Bus Club Charlton	20/06/2023	£24,450 over 2 further and final years (£12,045, £12,405) for the 'stay and play' service run by the Big Red Bus Club, including staff	£24,450	Maria Hughes

			salaries, volunteer expenses, activity costs and marketing and publicity materials.		
20090	Blind in Business Charitable Trust	01/02/2023	£165,375 over three years (3 x £55,125), towards 100% of the salary costs of a full-time Employment Manager (£33,075) and full-time Employment Co-ordinator (£22,050).	£165,375	Stella Brown
20076	Brentford FC Community Sports Trust	26/07/2023	£199,430 over five years (£37,495, £38,995, £39,970, £40,970, £42,000) for 0.5 FTE salary of Deaf Project Co-ordinator and oncosts, coaches, venue hire, Deaf interpreters, sports equipment, training, management and overheads, to provide sports, social and employability activities for Deaf and Disabled Young People.	£199,430	Hannan Ali
20062	British Deaf Association	21/06/2023	£96,290 over two years (£57,215, £39,075) contributing to salaries, project costs and associated overhead costs.	£96,290	Stella Brown
20201	Bromley Brighter Beginnings	24/03/2023	£40,500 over three years (£15,000, £13,500, £12,000) towards the cost of the charity's first paid employee, a General Manager.	£40,500	Lily Davies
20252	Camden Giving	08/08/2023	£90,000 over two further and final years (2 x £45,000) as core funding contributions towards the Director and Assistant Director posts.	£90,000	Abi Sommers
19539	Camden People's Theatre	13/06/2023	£81,000 over two years (£40,500; £40,500) towards costs related to their accessibility project.	£81,000	Khadra Aden
20266	Caryl Jenner Productions	14/07/2023	£3,600 (9 days) to provide an eco audit.	£3,600	Lydia Parr
19939	Castlehaven Community Association	14/06/2023	£105,050 over two further and final years (£51,524 and £53,526) to Castlehaven Community Association to continue and develop the Greenworks Project and support the wider Camden community to improve the local environment and open spaces.	£105,050	Dion Holley
20524	Centre for London	13/06/2023	£225,000 over three years (3 x £75,000) towards Centre for London's core work as part of a strategic relationship with the Trust.	£225,000	Abi Sommers

20249	Children Change Colombia Ltd	11/08/2023	CCC seeks one year of funding to pilot a new project in London called Colombia Colores: Discover your Colombian Roots aimed at the children of 1st, 2nd and 3rd generation Colombian migrant, refugee and asylum seekers, particularly when supporting 1st generation refugee and migrant children and those that are undocumented. This is an interesting pilot project which will aid integration of the young people in the UK whilst exploring their Colombian cultural roots. This proposal meets the criteria of the fund, the proposed costs are reasonable and the project has good monitoring and evaluation plans. £27,483 for one year towards a pilot project Colombia Colores: Discover your Colombian Roots	£27,485	Lydia Parr
20361	Circles South East	11/08/2023	£100,000 over a further and final two years (£50,000; £50,000) towards the salary of a FT Co-ordinator (35hpw) and associated costs of running Circles London	£100,000	Lily Brandhorst
19988	Citizen Development Community Centre (CDCC)	07/07/2023	£22,600 over two years (£11,300; £11,300) for a sessional Project Manager, sessional English Tutor, volunteer expenses and other project costs to deliver ESOL classes to women in Newham.	£22,600	Stella Brown
20257	Citizens Advice Hammersmith & Fulham	26/07/2023	£103,900 over two further and final years (£50,900; £53,000) for a f/t community outreach senior adviser and associated costs to provide outreach advice to communities who do not usually access mainstream advice services.	£103,900	Lorna Chung
19901	Clapton Common Boys Club	27/07/2023	£201,930 over five years (£38,500; £39,325; £40,110; £40,914; and £43,081) for Clapton Common Boys Club to run a parenting programme for Jewish fathers from low-income households.	£201,930	Gerard Darby
20108	COMM.UN	11/08/2023	£80,000 over two years (2 x £40,000) towards the Haramacy arts programme.	£80,000	Lara Rufus-Fayemi
19983	Community Drug and Alcohol Recovery Services	12/07/2023	£83,097 over two further and final years (£40,535 year one and £42,562 year two) as a contribution to the salary and related costs to deliver the charity's in-house and outreach health and wellbeing programme.	£83,097	Lily Davies
19561	Cruse Bereavement Support	16/06/2023	£99,950 over two years (£47,790, £52,160) towards the running of bereavement support groups and one to one sessions across London.	£99,950	Lily Davies

20170	Crystal Palace Community Trust	28/06/2023	£2,800 (7 days) to provide an eco audit.	£2,800	Lydia Parr
19908	Cypriot Community Centre	26/05/2023	£148,985 over three years (£46,565, £48,700, £53,720) for 1.0 FTE Advice Worker, management, AQS assessment, accreditation, and oncosts to provide specialist housing, employment and benefits advice and support social inclusion and integration of isolated people into the social aspects of the Cypriot Community Centre. Funding in years two and three are subject to the Cypriot Community Centre obtaining the Advice Quality Standard by the end of 2023-24.	£148,985	Lara Rufus-Fayemi
19755	Derman	01/09/2022	£245,000 over five years (£47,000, £48,000, £49,000, £50,000, £51,000) to employ a full-time Welfare Benefits Advisor to provide in-person support in Haringey and Hackney and offer a phone service more widely across North London.	£245,000	Hannan Ali
20169	DFN Project SEARCH	14/07/2023	£250,000 over five years (£50,000 a year) towards a Quality Impact Manager, associated costs and contribution to overheads.	£250,000	Lara Rufus-Fayemi
19810	Doorstep Library Network	26/05/2023	£110,610 over two years (£54,240; £56,370) to support staffing (two Programme Managers (0.3FTE each), one Project Coordinator (0.2 FTE) and a Volunteer Coordinator (0.2 FTE) and project costs over two years to sustain and expand volunteering activities in Westminster and Lambeth, to provide weekly reading sessions to disadvantaged families.	£110,610	Lara Rufus-Fayemi
20234	Dream Believe Achieve (DBA) CIC	20/06/2023	£51,250 over two years (£25,000, £26,250) towards staff costs for the Female Youth Engagement Project, as well as relevant project and management costs.	£51,250	Abi Sommers
19803	EDUCATIONAL DANCE PROVISION SERVICES	14/07/2023	£50,000 over five years (£10,000 x 5) to ensure continued delivery of Developmental Dance Movement activities to children with SEN&D/ASD with complex support needs, in a community setting.	£50,000	Caspar Cech-Lucas
19932	Ellingham Employment Services	05/06/2023	£3,870 to meet the costs of an independent access audit of Ellingham Employment Services, including an access design appraisal of refurbishment plans and access and equality training for staff.	£3,870	Lily Brandhorst
19621	Enfield Somali Community	23/05/2023	£124,500 over five years (£32,100; £32,100; £22,300; £22,300; £15,700) to support the provision of targeted specialist advice and	£124,500	Lara Rufus-Fayemi

			support services for Somali people, and others in need, living in Enfield to help them remain safe, independent, and healthy.		
20167	Equal People Mencap	27/07/2023	£155,390 over three years (£50,497; £51,767 and £53,126) for Equal People Mencap to run a programme for people with learning difficulties in Kensington & Chelsea to enable them to become ready for work or gain volunteering roles.	£155,390	Gerard Darby
19716	Ethiopian Women's Empowerment Group	14/06/2023	£42,300 over three years (£13,800; £14,100; £14,400) towards salary costs and associated overheads of the Executive Director role (2 additional dpw) to sustain and develop the charity's work in west London.	£42,300	Kate Halahan
20231	Family Action	10/07/2023	£98,037 over 3 years (£32,444, £32,380, £33,213) for a part time (18.5hrs) Caseworker, 3 hours per week for the Service Manager, volunteer costs, associated activity costs for participants and project management costs.	£98,037	Stella Brown
20522	Family Futures CIC	28/06/2023	£3,000 (7.5 days) to provide an eco audit.	£3,000	Lydia Parr
20142	Fight Against Blindness	21/07/2023	£89,600 over four years (£22,400 x 4) to cover the costs of a principal psychologist and a small portion of overheads.	£89,600	Hannan Ali
20251	Four Corners Ltd	28/06/2023	£3,000 (7.5 days) to provide an eco audit.	£3,000	Lydia Parr
20143	Friends of Windmill Gardens	26/05/2023	£30,000 over three years (£10,000 x3) towards gardening and horticulture workshops for individuals with learning difficulties at Windmill Gardens Park.	£30,000	Lydia Parr
20404	Fulham Football Club Foundation	15/07/2023	£2,600 (6.5 days) to provide an eco audit.	£2,600	Lydia Parr

20158	Generation: You Employed, UK	10/03/2023	£246,890 over three years (£82,294, £82,294, £82,294), of which £119,390 will be spent, over the funding period, across a number of staff positions, an Outreach Manager, Senior Outreach Manager, Admissions Manager, Mentors, and Employability Coaches, which combined do not exceed one full time position. £106,500 will be spent, over three years, on learner programme costs which includes contribution to childcare and nursery costs, outreach materials, laptops and dongles. A further £21,000 is requested as a contribution to London related overheads. £246,890 over three years to improve the lives of disadvantaged young women in London through the provision of bootcamp training, mentorship and coaching and signposting to jobs and careers. 24/05/23 - All information up to date on BBGM. Please note that forecast info and 2023 figures are in the same document.	£246,890	Stella Brown
20241	Goldsmiths Community Association	26/05/2023	£2,400 (6 days) to provide an eco audit.	£2,400	Lydia Parr
19922	Grand Union Music Theatre Ltd	01/06/2023	£40,500 over two years (£26,500, £14,000) towards creative projects bringing marginalised communities together and to empower emerging young artists to strengthen their voices by creating and sharing their work.	£40,500	Hannan Ali
19305	H&F Giving previously called United in Hammersmith & Fulham	26/07/2023	£125,000 over two years (£70,000; £55,000) towards the 0.7 FTE Partnerships & Fundraising Manager; the Needs Analysis and a £10,000 contribution to core costs each year.	£125,000	Lily Davies
20541	Half Moon Young People's Theatre Ltd	27/07/2023	£139,000 for the costs of access improvements of the Half Moon Theatre venue. Use of the contingency sum included in the budget is to be pre-agreed in writing with City Bridge Trust.	£139,000	Lydia Parr
19742	Hampstead Theatre	21/07/2023	£2,450 to meet the costs of an independent access audit of Hampstead Theatre to provide recommendations to improve accessibility for all users	£2,450	Lily Brandhorst
19911	Helen Bamber Foundation	10/11/2022	£240,000 over four years (£64,500, £61,500, £58,500, £55,500) towards core support to enable survivors of trafficking to access	£240,000	Lara Rufus-Fayemi

			trauma-informed, specialist clinical care to rebuild their lives and engage with new opportunities to move forward.		
19969	Hodan Somali Community	17/12/2022	£186,000 over 5 years (£22,000, £38,000, £40,000, £42,000, £44,000) towards staffing and delivery costs of an income maximisation and employability support programme.	£186,000	Lara Rufus-Fayemi
21342	Institute for Voluntary Action Research	10/07/2023	£120,000 over three years (£40,000; £40,000; £40,000) towards the costs of the Open and Trusting Grant-making initiative.	£120,000	Clara Espinosa
19845	Into the Light Counselling and Support for Survivors C.I.C	22/10/2022	£49,600 over four years (£7,980, £12,880, £13,940, £14,800) to run biannual Women's Survivors Group Psycho-Educational Courses for Londoners.	£49,600	Lily Davies
19905	Iranian Association	16/11/2022	£150,175 over five years (£28,342; £29,163; £30,010; £30,881; £31,779) for 0.5 FTE Emotional Support Adviser and 0.2 FTE Marketing & Administrative Assistant, Training, four Cultural Events and oncosts to improve the health and emotional well-being of Iranian refugees.	£150,175	Lara Rufus-Fayemi
20235	Iraqi Association	15/07/2023	Funding towards the provision of immigration, welfare and settlement advice to asylum seekers, refugees and migrants under your Support for refugees, asylum seekers and migrants themed priority is recommended as follows: £125,225 over three years (Y1: £40,740; Y2: 41,732; Y3: 42,753) to cover the costs of a full-time multilingual Advisor and a portion of overheads.	£125,225	Abi Sommers
20307	Islington/ The Maya Centre	14/07/2023	£106,990 over two further and final years (£51,940; £55,050) for specialist counselling for minoritised, Global Majority, refugee and migrant women who have experienced gender-based violence and trauma.	£106,990	Anneka Singh
19629	Islington Faiths Forum	26/07/2023	£185,450 over three years (£61,478; £61,376; £62,596) for the salary, activity and oncosts of the Community Welfare Outreach Workers, hosted by Muslim Welfare House; the specialist immigration advice, delivered by Praxis; print and advertising costs; IFF's costs associated with delivering the project's capacity building work and a contribution to IFF's office costs.	£185,450	Lara Rufus-Fayemi

20059	Kids Can Achieve	26/06/2023	£129,000 over two further and final years (£64,000, £65,000) towards a 1 FTE Family Support Worker, as well as associate project and management costs.	£129,000	Abi Sommers
20619	Kunsaka	14/07/2023	£48,500 (£9,700 x 5) towards supporting 50 BAME older adults living in the disadvantaged wards of Wandsworth to improve their health and wellbeing.	£48,500	Caspar Cech-Lucas
19718	Ladies of Virtue Outreach CIC	05/07/2023	£88,960 over three years (£26,880; £29,570; £32,510) towards ESOL classes and a volunteer programme for refugee and migrant women. Funding is conditional on the submission of an updated safeguarding policy.	£88,960	Lorna Chung
20340	Lewisham Youth Theatre	15/07/2023	£99,600 over two years (£49,063, 50,537) towards the cost of a Youth Voice Co-ordinator and associated project costs.	£99,600	Lara Rufus-Fayemi
19989	Life after Cancer	21/12/2022	£50,000 over 5 years (£10,000 x 5) to run peer support groups and coaching programmes in Waltham Forest for people who have finished cancer treatment.	£50,000	Hannan Ali
20259	Link UP London C.I.C.	31/07/2023	£299,000 over five years (64,000; 57,000; 58,000; 59,000; 61,000) towards the salaries and on-costs of the Skilled Volunteering Officer (0.5 FTE) and Events Manager (0.5 FTE), postholders, travel and training, event costs, and a contribution to core costs.	£299,000	Matthew Robinson
19786	London Arts and Health Forum	30/09/2022	£152,915 over five years (£32,250, £28,400, £29,565, £30,750, £31,950) as a contribution to the recruitment of training providers, a network facilitator, project manager (Creativity and Wellbeing Week) and Children/Young People Coordinator.	£152,915	Lily Davies
20202	London Diocesan Fund	03/07/2023	£2,800 (7 days) to provide an eco audit.	£2,800	Lydia Parr
19650	London Nightline at ULU (soon to be renamed as London Nightline)	11/08/2023	£100,000 (£50,000; £50,000) over two years towards core costs to enable London Nightline to provide a free peer-to-peer confidential night-time listening service for students in distress and the associated operational costs.	£100,000	Lydia Parr
19915	Lord's Taverners	12/06/2023	£198,600 over three years (£60,000; £66,000; £72,600) to expand and deliver the Super 1s, an inclusive cricket programme for disabled young people aged 12-25, across London.	£198,600	Lily Davies

19792	Luminary Limited	14/06/2023	£53,500 over one year towards a 1 FTE Progression Support Worker, as well as associated management and project costs.	£53,500	Abi Sommers
20534	LUX	11/08/2023	Recommendation: £2,750 for an access audit and access and equality awareness training.	£2,750	Hannan Ali
19977	Markfield Project	27/07/2023	£137,235 over three years (£44,812, £45,496, £46,927) to Markfield Project for improving the transition to adulthood for young people with SEND through a holistic approach.	£137,235	Salma Abdi
19923	Mind in Harrow	15/06/2023	£95,400 over 2 years (£49,600; £45,800) towards the cost of strengthening the voice and leadership skills of Harrow residents with mental ill health so that they can better influence and shape local services. Funding will support a senior manager post and training and delivery costs of a peer volunteer programme.	£95,400	Lara Rufus-Fayemi
21234	Money4YOU	21/07/2023	Funding recommended at same level as 2022 support. Request went to FD meeting on 10/07/23	£100,000	Lorna Chung
20207	Mosac	13/06/2023	£85,100 over two further and final years (£42,100; £43,000) towards salary costs to support the volunteering and peer support programme, as well as a proportion towards clinical supervision, volunteer costs and overheads.	£85,100	Kate Halahan
20061	Muslim Charities Forum	27/07/2023	Award £245,500 (£72,500, £82,000, £91,000) to deliver policy development and advocacy, to strengthen representation of the London Muslim-led charity sector and build capacity for minority communities.	£245,500	Hannan Ali
20221	National Centre for Young People with Epilepsy (operating name Young Epilepsy)	14/07/2023	£95,972 over two years (Year One: £49,249; Year Two: £46,723) to deliver a Voice and Leadership programme for young people with epilepsy in London, covering staffing and project costs. First payment to be contingent on the completed review of the off-site activity Safeguarding Addendum to officers satisfaction.	£95,972	Lily Davies
20546	Neighbourhood Watch Network	03/07/2023	£81,210 over two years to deliver activities in London to amplify young peoples' voices and paths to leadership in crime prevention, to build safer and more cohesive communities.	£81,210	Abi Sommers
20164	New Art Studio	28/07/2023	£45,000 over three years (3 x £15,000) towards the cost of providing art therapy for refugee and asylum seekers to help to address	£45,000	Stella Brown

			trauma and build confidence and self-esteem. Funding will support art psychotherapy posts and studio costs.		
19790	Nordoff Robbins Music Therapy	04/10/2022	£161,685 over three years (£52,830; £53,890; £54,965) towards Nordoff and Robbins' programme of music therapy in London schools including the salary of a full-time music therapist, travel costs, musical instruments, management, and office costs.	£161,685	Lara Rufus-Fayemi
20128	One Newham	17/07/2023	£100,000 over two years (£50,000 x 2) to build better representative mechanisms for community groups in Newham. The funding award covers a 21 hours p/w Co-ordinator and related project costs.	£100,000	Anneka Singh
20279	One Newham	12/06/2023	£14,000 towards the Newham Community Fund, with a contribution of £10,000 for onward grant-making and £4,000 for associated overheads.	£14,000	Anneka Singh
20136	Osmani Trust	26/05/2023	£4,000 (10 days) to provide an eco audit.	£4,000	Lydia Parr
20219	Our Time	26/05/2023	£61,000 over two further and final years (£34,000; £27,000) towards the salaries of Our Time's CEO, Head of Education and Learning and Development Director.	£61,000	Anneka Singh
19677	Oval Learning Cluster	02/08/2023	£73,200 over two years (£35,700, £37,500) for staffing and delivery costs of delivering a capacity-building programme and associated events for local voluntary organisations in North Lambeth.	£73,200	Stella Brown
19789	Palace for Life Foundation	03/10/2022	£250,000 over three years (£81,000, £83,000, £86,000) towards the 'Made in South London' campaign to support the scaling of programmes with young women and disabled participants to reach a further 3,600 children and young people in South London.	£250,000	Hannan Ali
20210	Pause	04/08/2023	£249,400 over three years (£83,300; £83,300; 82,800) to design and deliver an innovative psycho-educative therapeutic group programme for women who have experienced repeated removals of children from their care	£249,400	Lily Brandhorst
20171	PEER	26/06/2023	£5,000 to meet the costs of an independent access audit of PEER, including an access design appraisal and staff training.	£5,000	Lily Brandhorst
20298	Peer Power Youth	15/07/2023	£99,125 over two years (£48,680; £50,445) towards the cost of Peer Power Youth's young partners leading and delivering voice and influence work across health, social care and justice.	£99,125	Stella Brown

20139	Phosphoros Theatre	26/07/2023	£125,632 (revised amount) over three years (£40,646, £41,860, £43,126) (Head of Community 1.75 FTE £14,498, £14,931, £15,383; Producer 1.75 FTE, £14,498, £14,931, £115,383); Admin and support officer 0.14 FTE £5,280, £5,438, £5,602) toward the project management and delivery costs of PT community engagement work for young refugees and asylum seekers in London.	£125,632	Lydia Parr
19980	PramDepot C.I.C.	28/07/2023	£76,000 over three years (£25,600, £25,600, £24,800) towards costs of staff and materials for baby box distribution to women who are refugees, asylum seekers or have insecure migration status, across London.	£76,000	Stella Brown
19779	Project TurnOver UK	26/05/2023	£85,000 over five years (£27,500; £22,500; £17,500; £12,500; £5,000) as core funding to underpin the work Project TurnOver UK does supporting young people (12-21 years) at risk of being, or who have been permanently excluded from school, are known to the police, are in prison or a Youth Offending Team, in care or are at risk for the school to prison pipeline.	£85,000	Sandra Jones
21101	Race On The Agenda	12/06/2023	£60,000 over 12 months to enable Race On The Agenda to offer a competitive salary to recruit a suitable CEO.	£60,000	Lydia Parr
19921	Rainbow Migration	14/07/2023	Funding is recommended as follows: £128,489 across three years (£41,570, £42,817, £44,102) to deliver its specialist emotional and practical support services and unique immigration advice service for LGBTQI+ asylum seekers based in London.	£128,489	Dion Holley
20222	Rosie Trustram, Centre 70	28/06/2023	£2,800 (7 days) to provide an eco audit.	£2,800	Lydia Parr
20548	Royal Air Forces Association	14/07/2023	£84,120 (£41,640, £42,480) over two years to deliver advice and befriending support to reduce the impact of the cost-of-living crisis and isolation on older RAF veterans.	£84,120	Lily Davies
20604	SeeAbility, the operating name of The Royal School for the Blind	10/07/2023	£100,000 over two further and final years (£50,000, £50,000) for staff and running costs of the Every Day in Focus programme, improving access to eye care for Londoners with learning disabilities and autism.	£100,000	Abi Sommers
20102	Single Homeless Project	30/06/2023	£90,474 over 2 years contributing to salary, management support, staff travel and psychotherapy support.	£90,474	Lily Davies

20153	Sitopia Farm CIC	08/08/2023	£30,000 over three years (£10,000; £10,000; £10,000) towards the costs of delivering community volunteering opportunities for local schools and individuals, and towards any costs incurred in the organisation's refresh of its safeguarding policy and training.	£30,000	Matthew Robinson
20161	Social Farms & Gardens (SF&G)	04/08/2023	£474,000 is recommended over five years (87,500; 91,000; 94,500; 98,500; 102,500) towards the salaries of the London Learning and Development Manager and London Learning and Development Officer, freelance facilitation costs, event costs, travel expenses, access costs, external evaluation, and a proportionate contribution to core costs.	£474,000	Matthew Robinson
20284	Spurgeons	31/07/2023	£131,100 over three years to deliver the Boys2Men project in Hounslow, to support boys and young men aged 10 - 18, who are engaged in criminal activities or vulnerable to becoming so, to make better life choices.	£131,000	Abi Sommers
19740	StandOut Programme	13/06/2023	£248,540 over four years (£60,100, £59,920, £62,740, £65,780) towards the costs of running a coaching programme in HMP Wormwood Scrubs.	£248,540	Lily Davies
19991	St Andrew's United Reformed Church	28/06/2023	£3,000 (7.5 days) to provide an eco audit.	£3,000	Lydia Parr
20092	St Botolph without Aldgate	14/07/2023	£2,800 (7 days) to provide an eco audit.	£2,800	Lydia Parr
20550	St Clement and St James Community Development Project	21/07/2023	£164,122 over five years (£30,000, £31,350, £32,761, £34,235, £35,776) to deliver an Information, Advice and Guidance and Employment service which provides impartial advice and support for local residents from low income and marginalised populations.	£164,122	Lily Davies
20058	St Margaret's House Settlement	28/07/2023	£90,715 over two further and final years (£45,493; £45,222) towards the Project Coordinator salary, running and project management costs of the arts programme for disabled adults in Tower Hamlets and Newham, to increase confidence, independence, and autonomy of participants.	£90,715	Maria Hughes
20080	St Mary Aldermary	14/07/2023	£3,600 (9 days) to provide an eco audit.	£3,600	Lydia Parr
19868	Stonegrove Community Trust	04/08/2023	£39,320 capital funding to contribute to the cost of installing 222 solar panels at the OneStonegrove community centre.	£39,320	Lydia Parr

20079	Stonewall Housing	26/07/2023	£149,273 for three further and final years (£49,470; £49,803; £50,000) for 1 FTE Advice practitioner, IT and phone costs, admin, line management and oncosts.	£149,273	Lily Davies
20362	Street Storage	11/08/2023	£2,050 for an access audit for Street Storage's new headquarters and to provide accessibility training.	£2,050	Hannan Ali
20238	Sutton Vision	14/07/2023	£89,000 over 5 years (£19,600, £18,800, £17,800, £16,800, £16,000) as a core grant, to support ongoing delivery of activities aimed at reducing isolation of individuals with a visual impairment in Sutton	£89,000	Lara Rufus-Fayemi
19975	TaxAid	23/05/2023	£150,000 over three years (£48,000; £50,000; £52,000) towards tax advice provided for people residing in London, including for a full-time Tax Adviser salary and on-costs, promotion materials and a contribution to overheads.	£150,000	Matthew Robinson
20125	The Attlee Centre	26/05/2023	£4,000 (10 days) to provide an eco audit.	£4,000	Lydia Parr
19708	The Connection at St Martin-in-the-Fields (CSTM)	09/08/2022	£156,710 over three years (£50,370; £52,385; £53,955) for an accredited Migration Co-ordinator to deliver specialist immigration casework and supervise a migration caseworker.	£156,710	Lara Rufus-Fayemi
20137	The GeshherEU Support Network	24/02/2023	£107,200 over five years (£19,302, £20,325, £21,371, £22,504, £23,698) to the part-time salary of the Community Co-ordinator and project costs to support services users in London, all of whom have left the Ultra-Orthodox Jewish community, to build support networks, skills, and a life in mainstream society.	£107,200	Lara Rufus-Fayemi
19772	The Grove Centre	17/07/2023	£2,625.00 to meet the costs of an independent access audit for the design appraisal for a more flexible and accessible space for community use.	£2,625	Khadra Aden
19805	THE GUILD CHURCH COUNCIL OF ST KATHARINE CREE	15/07/2023	£2,400 (6 days) to provide an eco audit.	£2,400	Lydia Parr
19777	The Hackney Foodbank	23/05/2023	£219,900 over five years (£41,900; £42,400; £43,800; £45,200; £46,600) towards a full-time Case Worker and associated project costs.	£219,900	Clara Espinosa

19610	The Hardman Trust	02/06/2023	£239,920 over three years (£84,670; £78,570; £76,680) for salary, project and management costs for the pilot project working with prisoners in London and those returning to London to test effective interventions to enable positive resettlement for people on release from long term prison sentences.	£239,920	Lara Rufus-Fayemi
20263	The Harrow Club	03/07/2023	£250,000 over five years (£45,200; £47,500; £49,900; £52,400; £55,000) for a full time Another Way Project Lead.	£250,000	Anneka Singh
20230	The Leaside Trust	13/06/2023	£150,000 for access improvement works including a replacement platform lift, replacement river jetty, signage and wayfinding, project management fees, among other smaller access improvement works, and a contingency sum. Use of the contingency sum is to be pre-agreed in writing with City Bridge Trust.	£150,000	Matthew Robinson
19795	The Lloyd Park Children's Charity	26/05/2023	£250,000 over 5 years (5 x £50,000) towards the role of a Community Wellbeing Support Worker and on costs.	£250,000	Lara Rufus-Fayemi
20233	The Magpie Project	14/07/2023	£260,550 over 5 years (48,400 50,150, 52,000, 54,000 and 56,000) towards the Family Support Manager salary (1 FTE) with on costs and running costs	£260,550	Lara Rufus-Fayemi
20111	The Stuart Low Trust	04/08/2023	£239,900 over five years (£46,600; £48,600; £47,300; £49,300; £48,100) for a part-time Arts Inclusion Project Coordinator (17.5 hours/week), part-time contributions to Project Administrator (5 hours/week) and Chief Executive Officer (3.5 hours/week project development role) salaries, other project costs and support costs, to deliver the 'SLT pARTicipate' project in Islington. Funding is conditional on reviewing SLT's revised Financial Control Policy.	£239,900	Stella Brown
20225	The Switchback Initiative (known as Switchback)	11/08/2023	£242,780 over 4 years (£57,306, £59,685, £61,799 and £63,990) towards the salary and oncosts for a Switchback Specialist Mentor to support & enable more young Londoners- Trainees through mentoring to find a way out of the justice system and build a stable, rewarding life in the community. The funding requested will also support the caseloads costs of Trainees and their expenses.	£242,780	Stella Brown
19952	The Together Project CIO	27/07/2023	£125,000 over 3 years (£42,000, £41,000, £42,000) towards costs of rolling out Songs & Smiles intergenerational music groups across London	£125,000	Lara Rufus-Fayemi

20267	THE UNCONNECTED FOUNDATION	11/08/2023	TUF request for £90,000 over 3 years (£50,000, £25,000, £15,000) to develop a digital app and distribute mobile technology to ensure access to digital tools to help refugees find housing, food vouchers, legal assistance, learning English and for communication. The proposal very clearly meets the criteria of the funding and offers an innovative way of providing much needed advice, guidance and assistance to refugees and migrants when they are their most vulnerable. The proposal to use expert refugees to develop the app is an interesting concept and adds an additional connection to the lived in experience of the proposal. The project benefits from the expertise of the Directors of CIO, their connections and existing work across London.	£90,000	Lydia Parr
19863	ThinkForward (Uk)	31/07/2023	£90,000 over three years (£50,000, £25,000, £15,000) to develop a digital app and distribute mobile technology to ensure access to digital tools to help refugees find housing, food vouchers, legal assistance, learning English and for communication £120,000 over three years (£40,000, £40,000, £40,000) towards a programme of coaching, youth participation and workplace activities for young women at risk of unemployment, empowering them to transition successfully into work.	£120,000	Lily Davies
20188	This New Ground CIC	10/07/2023	£10,000 over one year for a community choir, covering a sessional community choir leader, artist facilitator support and equipment and materials.	£10,000	Stella Brown
19999	Trust for London	24/07/2023	£64,986 over 12 months to the Citizenship and Integration Initiative pooled fund to embed work on migrant worker exploitation.	£64,986	Geraldine Page
20621	Trust for London	02/06/2023	£50,000 towards the London Fund research and delivery led by Trust for London in partnership with City Bridge Trust and the Esmée Fairbairn Foundation.	£50,000	Tim Wilson
19978	UK welcomes Refugees	23/12/2022	£127,370 over three years (£40,400, £42,420, £44,550) for the salary of 1.0 FTE Senior Community Organiser to build and manage a network of 30 Community Leaders from the Hong Kong refugee community, to help integrate 600 isolated Hong Kongers.	£127,370	Lily Davies

19866	Unique Talent CIC	22/06/2023	£162,500 over five years (£32,500 X 5) to cover the costs of a full-time support worker/mentor as well as a small portion of travel and resources costs.	£162,500	Stella Brown
19678	Vallance Community Sports Association	26/05/2023	£127,000 over three years (£44,000, £41,000, £42,000) towards staffing and delivery costs of an enhanced SEN programme that builds life skills and agency of young learning disabled participants.	£127,000	Lara Rufus-Fayemi
19829	Voluntary Action Harrow Co-op	04/08/2023	£117,800 over two further and final years (£58,000; £59,800) to develop and run the Harrow Giving Scheme, including the salary and on-costs of a FT (35 hpw) Community and Corporate Fundraising Manager and a contribution to core costs.	£117,800	Lily Brandhorst
20295	Volunteer Centre Tower Hamlets	27/07/2023	£228,420 over three years to enable voluntary sector organisations in Tower Hamlets to develop high quality and inclusive volunteering.	£228,420	Abi Sommers
20211	West London Zone	14/07/2023	£90,000 over three years (£30,000 each year) towards the salaries of Head of Knowledge (17.5 hpw) and Insights and Partnerships Officer (17.5 hpw).	£90,000	Stella Brown
20191	Whale Song Music Therapy CIC	01/08/2023	£67,485 over five years to provide free community music therapy to children, young people and adults with a learning disability living in Waltham Forest.	£67,485	Tilly Holmes
19842	Women's Association For African Networking And Development (WAND UK)	14/07/2023	£93,100 over three years (£28,860, £31,160, £33,080) towards the running of a food bank and food delivery services in Kensington and Chelsea.	£93,100	Hannan Ali
19776	Xenia	28/07/2023	£50,000 over two years (£24,118; £25,882) for freelance staff equivalent to 0.2 FTE for Project Delivery and Outreach and 0.2 FTE for Project evaluation and Communications; Citizens UK membership; participant and volunteer expenses and a contribution to core costs.	£50,000	Stella Brown
20399	You My Sister	21/07/2023	£38,640 to You My Sister over three years (£12,500, £12,875 and £13,265) towards outreach and the delivery of its online courses for survivors of the sex trade in London.	£38,640	Gerard Darby
TOTAL				£15,860,455	

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Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: Propel Programme Update	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Information
Report Author: Sam Grimmett Batt, Funding Director; Nat Jordan, Head of Propel Programme; Shegufta Slawther, Head of Propel Programme	

Summary

This paper provides an update on the Propel Programme, a ten-year funder collaboration co-ordinated by London Funders (the charity supporting the only cross-sector membership network of funders and investors in London’s civil society) to which City Bridge Trust (CBT) has allocated £30m. It provides confirmation of final Round One spend, plans for future rounds, and information regarding the distribution of spend for the remaining funds (£22.9m of £30m). Communities that experience structural inequality were prioritised for funding, with 100% of CBT’s funding going to equity-led organisations (that, is those led by and for racialised communities, Deaf and Disabled people, LGBT+ people and/or women and girls). This ensured that funding reached those organisations that are best placed to make change happen to explore, develop and lead collaborative approaches that tackle some of London’s biggest issues affecting change at systems level (addressing root causes) A list of funded organisations is provided at Appendix 2. As this is a highly ambitious and learning programme, timelines have shifted (as expected) following development work and decisions taken by the Propel Strategy Group (on which CBT officers sit). These changes allow the programme to remain flexible, responsive to sector need, and maintain its focus on equity outcomes (ensuring the programme remains inclusive and progressive) and impact at a systemic level (ensuring that the ultimate impact of the work is focused on tackling the root causes, and not just the systems, of inequality in London).

Recommendations

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

- i) Note the report.

Main Report

Background

1. Propel is a ten-year, £100m funder collaboration stewarded by London Funders. It provides strategic and long-term funding at scale for systems change work (fundamental change that affects how a whole system functions). It has a pioneering and innovating approach, for example utilising a common “front door” which allows applicants to submit one application which can be seen by multiple funders. In March 2022, £30m was earmarked towards the collaboration (see background paper), of which £7.1m has been spent to date. The programme will last for ten years and/or award grants of up to ten years. Other collaborating funders include the National Lottery Community Fund (NLCF) and the Greater

London Authority (GLA) (see Appendix 1 for other involved funders). It is envisaged that funding will be distributed across a number of rounds.

2. The Funding Committee has been kept abreast of programme development via the Chief Funding Director's reports, which have contained breakdowns of funding awarded, equity statistics, key dates etc.
3. **Appendix 1** contains further details on the background, aims and objectives of the programme. **Appendix 2** outlines funds awarded to date.
4. In Round One, which launched in October 2022, £7,126,610 was awarded to 33 organisations, for between one and three years of exploratory ("Explore grants") or development ("Deliver & Develop grants") work. All grants were awarded by April 2023. A learning partner has been appointed and learning discovery will be shared with the committee as it becomes available. See **Appendix 2** for a breakdown of Round One expenditure.

Programme Development

5. Subsequent open rounds will be shaped alongside funded organisations and other funder collaborators. A strategy group including collaborating funders and equity partners (which has CBT representation) agrees programme design, start dates etc. There is currently no appetite to award grants to new organisations through an open round in this financial year: This is because most of the projects awarded funding in round one are still underway, and in the very early stages. In order to provide continuity for as many of the originally funded organisations as possible, in line with the Propel aims and objectives, which include long-term funding over a period of up to 10 years, the strategy group has agreed to wait until groups have undertaken sufficient work within their respective projects to feed into the co-design of the next round.
6. In this financial year and next, CBT are likely to award top-up grants to some of the organisations awarded an initial twelve months of exploratory funding (known as Explore grants). This will allow applications for continuation funding for those projects where it is appropriate.
7. Of the 28 Explore grants made in the first round, CBT funded the vast majority (23 grants). The initial delivery of this 'top-up' funding will only involve CBT but will still operate under the Propel umbrella, and utilise its single 'front door', which allows access to existing project and organisational information,
8. The exact design of the programme is subject to co-design with the cohort of funded organisations, other funders and equity partners, but some broad principles are in place. These include developing a process that recognises both the early development and exploratory nature of these grants, and that funded work is highly user-driven, meaning that priorities may shift.
9. These grants will be recommended between January and March 2024 (for the first up to 16) and between April and July 2024 (for the last up to 7), according to CBT's scheme of delegated authority. Based on initial forecasting, it is not expected that any one of these grants is likely to exceed £400,000.

10. The remaining Propel grantees already funded will be offered the opportunity to apply for continuation funding through further rounds of collaborative Propel funding in 24/25 and 25/26. There may also be new grants awarded depending on the total amount of funds available within the collaboration.

Budget Update

11. The original recommendation paper (in March 2022) stated that £30m would be earmarked, with a view to committing the full amount over two years providing there were sufficient contributions of scale from other funders.

12. There were sufficient contributions of scale from other funders (including the Mayor of London and National Lottery Community Fund), but these were committed with a view to being awarded over a longer period. In the spirit of the collaborative nature of the fund, and because awarding our contribution over the initially envisaged period would have meant funding without the leverage of other collaborators, the timescale for delivery has been extended.

13. The Funding Committee was informed in December 2022 that £5m had been spent in 22/23 and that £12.5m was allocated in 23/24. There have since been further revisions (outlined below).

14. The change to the timescale of the funding being released does not have any impact on the overall allocation of £30m to be spent, and therefore will not impact any other planned programmes. The overall Propel timescale of ten years is also unaffected.

15. This change has also been reflected in the revised forecast presented in the Budget Monitoring Report in this paper pack, with a reduction in anticipated expenditure in this financial year (2023/24). Originally £10.5m had been allocated towards Round Two in 2023/24, but that round will now take place in f/y 2024/25, with £4.9m of expenditure committed in f/y 2023/24 (representing top-up grants and some residual Round One applications that were approved after year end).

16. Please see the revised expenditure plan below, noting that as this is a highly iterative programme there are likely to be further changes over time. The Committee will be kept informed of developments.

Table 1: Revised Expenditure Plan

	22/23	23/24	24/25, 25/26 and onwards	Total
Original Forecast	£15m	£15m	£0m	£30m
Revised Dec 22	£5m	£12.5m	£12.5m	£30m
Actual/Current forecast	£5.7m*	£4.9m**	£19.4m	£30m

* Some Round One expenditure was carried over into 23/24 due to delays in decision making.

** of the £4.9m, £1.4m is Round One expenditure already incurred and £3.5m is forecast to be spent on top-up grants.

16. The original forecast was an estimate, as Propel is a learning and iterative programme, and at the time of forecast (and the revised forecast) programme development and collaborative negotiation had not yet begun.
17. Forecast expenditure from 2024/25 onwards remains dependant on agreements at the Propel Strategy group which will be informed by learning from grants awarded, information from the learning partner, and equity partner input.
18. Please see the table below which outlines the expenditure plan in terms of rounds of funding. Note that Round Two planning has not yet begun, and the total awarded will depend on decisions around programme design taken by the Propel Strategy Group. This figure is therefore subject to significant revision once planning begins. Round Three onwards is subject to planning in future years.

Table 2: Expenditure Plan in Terms of Rounds of Funding

Round One (actual)	Top-up Grants (forecast)	Round Two (forecast)	Round Three onwards (forecast)	Total
£7.1m	£5.5m	Between £4m and £10m	Between £7.4m and £13.4m	£30m

Corporate and Strategic Implications

19. Strategic Implications: The activities outlined in this paper support the aims and objectives of BHE’s overarching strategy, *Bridging London 2020 – 2045*. They will support the charity in becoming a world-class charitable funder and responsible leader.
20. There are no further financial, security, legal, risk, equalities or climate implications other than those already outlined in the report.

Conclusion

21. Propel continues to successfully deliver a collaborative and innovative approach to funding long-term systems change in London’s Civil Society. Programme development is progressing well, with partners continuing to engage through the stewardship of London Funders.

Background Papers

- Report to the Funding Committee of the Bridge House Estates Board, dated 9 March 2022, entitled ‘Collaborative Action for Recovery’ (non-public), Item 21.

Appendix 1: Propel Background

Propel is focused on putting money and power in the hands of communities who are best placed to make change happen.

Propel is and has always been about collaboration – recognising that the challenges we face are too big for any funder, charity or community to tackle alone. Our shared ambition is to build long-term collaborations that draw on the strengths and assets of us all so that, together, we can tackle the issues facing London.

Over the next ten years, Propel will provide flexibility and capacity to organisations led by and for groups experiencing structural inequality so that they can explore, develop and lead collaborative ways of tackling some of London's biggest challenges. This includes providing support for young people, women and girls, LGBT+ communities, Deaf and Disabled people, and communities experiencing racial inequity.

Propel is powered by [London Funders](#) and are being supported by a growing list of funders, including Bloomberg, City Bridge Trust – the City of London Corporation's charity funder – The National Lottery Community Fund, the Mayor of London, Sadiq Khan, Trust for London, Paul Hamlyn Foundation, Lloyds Bank Foundation, Mercers, John Lyons Charity, John Laing Trust, Bloomberg, and advice funders co-ordinated by London Legal Support Trust.

We are encouraging more funders to get involved in this ongoing collaboration to give London's communities the long-term support needed to drive change in the capital. If you're a funder who is interested in getting involved, email the London Funders team: info@londonfunders.org.uk

The principles uniting Propel funders

These principles were co-designed with Propel partners, which emerged as the most challenging for funders to build processes and programmes around, and therefore the greatest opportunities to test ourselves.

- **Systemic** – engaging with the whole system around an issue, tackling root causes not just symptoms, building a shared understanding of how systems can change
- **Bold** – experimenting and taking risks together, influencing wider ways of working
- **Flexible** – recognising that the future is uncertain, that funders and grantees are on a learning journey together, trusting grantees to respond to changing challenges and opportunities
- **Sharing power** – recognising that everyone has something to contribute (money, knowledge, networks and reach), investing in people's capacity to co-design, embedding participation in decision-making from the start, building trust and confidence

- **Equitable** – unlearning old ways of working, biases, and lenses on the world, ensuring that design, process and decision-making are inclusive and take account of the diversity of the sector and of communities
- **Non-partisan**– recognising both civic and democratic leadership, combining the convening power of politicians with wider participation and voice
- **Long-term** – investing beyond political and institutional cycles, providing stability for civil society partners and seeking to make transformational change
- **Accountable** – jointly accountable to each other and to the communities we serve

Funding partners



MAYOR OF LONDON



Appendix 2: Round One Expenditure (CBT funding only)

CBT has awarded a total of £7,036,700 across 10 Deliver and Develop (D&D) grants for up to three years, and 23 Explore grants for 12 months. The larger D&D grants ranged from £150,000 to just over £1.1m, while the smaller Explore grants were for up to £50,000. The success rates for applications assessed by CBT for D&D and Explore grants were 77% and 79% respectively.

Explore – a grant for up to one year, for up to £50,000, for organisations to explore the issues they want to tackle, how change might be possible and who needs to be involved in making the change happen.

Deliver and Develop – a grant for up to three years of up to £1.5m to expand existing delivery, learn about the impact, and build partnerships to scale approaches that work.

User led category	Total £ Approved (Explore)	# Approvals (Explore)	Total £ Approved (D&D)	# Approvals (D&D)	Total £ Approved (all)	# Approvals (all)
Deaf and Disabled	£198,910	4	£1,290,500	3	£1,489,410	7
Intersectional	£94,000	2	0	0	£94,000	2
LGBT+	£146,300	3	0	0	£146,300	3
Racialised/migrant	£368,000	8	£2,315,600	4	£2,683,600	12
Women and Girls	£291,500	6	£500,000	1	£791,500	7
Not by and for	£0	0	£1,921,800	2	£1,921,800	2
	£1,098,710	23	£6,027,900	10	£7,126,610	33

Organisations from the first cohort of grantees were invited to a Welcome Breakfast hosted by London Funders at the Arc Community Centre in Islington on 26 April 2023. The event was well attended, with speakers including Bruna Boscaini, Director of IRMO (co-funded through Propel by CBT and London Legal Support Trust), Ali Ahmed from equity partner Ubele, with the Chair of the Funding Committee, Paul Martinelli, representing CBT.

List of grants awarded:

Organisation	Amount (£)
The Ubele Initiative	1,216,600
The Bridge Renewal Trust	1,073,400
Inclusion London	989,600
Young Westminster Foundation	848,400
Race On The Agenda	500,000
Women's Environmental Network Trust	500,000

Lewisham Refugee & Migrant Network (LRMN)	398,000
Indoamerican Refugee and Migrant Organisation	201,000
Action on Disability	150,900
Disability Law Service	150,000
Islington/ The Maya Centre	50,000
Maternity Action	50,000
Day-Mer, Turkish and Kurdish Community Centre	50,000
AVA - Against Violence and Abuse	50,000
National Survivor User Network	50,000
Touretteshero CIC	49,910
British Deaf Association	49,900
Goldstar Creative Marketing	49,900
Friends of the Joiners Arms Ltd	49,800
Connected Routes CIC	49,500
Hackney Chinese Community Services Association Ltd	49,500
Mabadiliko CIC	49,100
Headway East London	49,100
Project Zero WF	48,700
Queercircle CIO	48,500
Teen Action	48,100
Mosaic LGBT+ Young Persons' Trust	48,000
C V S Brent	47,200
Women's Resource Centre	45,900
Place At My Table	44,300
Connect: North Korea	42,800
Anti Trafficking & Labour Exploitation Unit	42,100
St Mary's Centre Community Trust	36,400
	7,126,610

A list of organisations funded by the whole collaboration in Round One can be found here: <https://londonpropel.org.uk/news/first-grants-made-through-propel/>

Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: End-to-End Review of CBF's Main Grant-making Programme	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Information
Report Author: Julia Mirkin, End-to-End Review Project Manager	

Summary

To support the Funding Committee in the discharge of its duties, this report provides an update on the End-to-End Review of City Bridge Trust's main grant-making programme.

Recommendations

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

1. Note the contents of the report.

Main Report

Background

1. Further to the Chief Funding Director's report to the Funding Committee on the 12 June, the End-to-End Review commenced on the 19 June 2023. The End-to-End review is being delivered in parallel with the Chief Funding Director's work on the Proposed Future Direction of Travel, more details about which can be found in these papers. Whereas the proposed Future Direction of Travel focuses on CBT's funding strategy i.e., what CBT will fund, the End-to-End review focuses on our grant-making practice, i.e., how we undertake our funding activity. These are different but intrinsically connected workstreams and every effort is being made to ensure that all possible connections are being identified and explored to ensure the development of a coherent and effective review of CBT's grant-making activity.

Project Plan

2. A project plan for the End-to-End review has been created, which guides the work towards its conclusion, which will be the presentation of recommendations to this Committee on the 10 June 2024 about the development of CBT's main, responsive grant-making programme.

Internal and External Consultation

3. Two staff consultation groups have been established to support the development of the recommendations that will be brought to this Committee. The first, the Core Group, comprises colleagues who engage directly with grant-making through their work. This group will meet monthly from September 2023 until February 2024. The second staff group is an Advisory Group, comprising colleagues who have broader roles within Bridge House Estates. The role of this group will be to bring a broader

organisational perspective to the principles behind our funding work. The Advisory group will meet three times between November 2023 and March 2024.

4. A consultancy brief has gone out to tender for work that engages with both successful and unsuccessful applicants to CBT. Other elements of the brief are a mapping of funding opportunities in London; the delivery of focus group session with applicants to CBT and engagement with CBT's Equity Partners on the draft recommendations for this Committee. It is felt that using consultants for this external engagement work will engender the most honest feedback from past applicants and our Equity Partners. It is also consistent with the approach adopted for the Small Grants review.

Researching the Practice of Other Funders

5. Work to review the practice of other funders is underway, and useful conversations have been had with the Coop Foundation, John Ellerman Foundation, Lloyds Bank Foundation, The National Lottery Community Fund, the A B Foundation, the Paul Hamlyn Foundation and Esmée Fairbairn Foundation.
6. These meetings have covered pre-application support, due diligence, common rejection reasons, managing risk, engagement with unsuccessful groups, grant monitoring and management, portfolio sizes and continuation funding.
7. Learning points, based on anecdotal evidence, are that many funders are now operating at least a two-stage application process to minimise the time taken for those that are declined early in the application process. Different practices are adopted for different funds within funding programmes, recognising that more strategic funding requires more staff time and targeted work requires tailored approaches. There is a shift away from grant monitoring and towards relationship management, reflecting the move towards trust-based or relational funding practices. Finally, funders are offering more core and unrestricted funding. This raises new challenges, especially for attributing and measuring the impact of funding awarded, which will be a central line of enquiry addressed through the End-to-End review and the Proposed Future Funding Direction.

Grant Agreement

8. Work to revise the Grant Agreement has also commenced, with the aim of simplifying the document, making it more user friendly and reflecting the values and progressive tone of the charity's new brand. This work is being supported by the Strategy and Governance team, namely by the Policy & Projects Officer, Joaquim Freitas, who was formerly a Funding Officer with the Funding team. It is very much hoped that this element of the End-to-End review can also support the development of the Small Grants funding agreement and potentially be used by colleagues in the Corporate Charities Funding Unit.

Julia Mirkin

End-to-End Review Project Manager

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Committee	Date
Funding Committee of the Bridge House Estates Board	11 September 2023
Subject: What Age CBT Considers Older People	Public
Report of: Sacha Rose- Smith, Chief Funding Director	For Decision
Report Author: Caspar Cech-Lucas, Small Grants Programme Lead	

Summary

This report sets out information related to a recent review with the purpose of considering the feasibility of revising the age criteria that CBT considers older people, as requested by the Funding Committee during its June 2023 meeting. CBT has received valuable feedback from the sector during the Small Grants Review and in Small Grants Advice Surgeries that the age limit for older people should be reduced. The perceived restrictiveness of the current 70+ limit, particularly by organisations working with disadvantaged communities, prompted the Funding Committee to request an examination of CBT's criteria for older people. The existing age parameters for both Bridging Divides and Small Grants Programmes are as follows:

- People aged 70+ who are disadvantaged
- People aged 65+ and living with dementia or Alzheimer's
- Older carers aged 65+

Recommendation

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Approve Option 2, set out at paragraph 6 of the report, to empower self-definition and remove age restrictions from CBT's current funding criteria relating to older people.

Background

1. The most recent age criteria were introduced after the Bridging Divides Interim Review as the Trust's responsive grant making programmes came off pause "post pandemic", in June 2022. This adjustment from 65+ to 70+ reflected considerations of grant assessment capacity, rising life expectancy, and strategic targeting of those most in need. This decision was taken after internal consultation with the aim of ensuring that our capacity to assess grants was not overwhelmed, the rising life expectancy of London and the UK, and directing resources towards those most in need. As CBT is committed to learning and evolving, the opportunity to reflect again on the age criteria allows an iterative development of our programmes and criteria reflecting the needs of the sector.
2. As part of this review, an evidence bank was created to examine the practices of other funders that fund projects and organisations that support older people. This included The Baring Foundation, The Mercer's Company, The Clothworker's

Foundation, and The Wolfson Foundation, among a number of other funders. These findings indicate that the majority of funders either do not specify a fixed age for older people, allowing applicants the agency to define this parameter based on the communities they serve or define it as 65 / 66 years old, broadly in line with the current UK retirement age / when state pension can be claimed. In a 2019 paper, Age UK referred to older people as 65+¹ unless stated otherwise, but do not have a more up-to-date definition.

3. Life expectancy is generally increasing in a trend that was shown before the pandemic (which played havoc with life expectancy data trends) but it is important to note that it had been decreasing for many pockets of lower income people². London demonstrates significant variance in life expectancy by borough, with another key point being the correlation between healthy life expectancy and socioeconomic status, underscoring the greater influence of poverty on overall wellbeing compared to general life expectancy³.

Proposals

4. In light of the feedback received and the evolving landscape, three options for revising the age criteria have been identified. Each option is aligned with our commitment to support older people to lead active, independent, and healthy lives that are rich and fulfilling.

5. Option 1: Reduce Age Limit

- Lowering the age criteria to 65+ (from 70+)
- Lowering the age criteria for People who are from marginalised communities to 60+ recognising aging intersects with the inequalities that these communities already experience in different ways.
- Removing age limit for people living with dementia or Alzheimer's. Although they are most common in people over the age of 65, both can affect people at any age, (this overlaps with our Deaf and Disabled Peoples strand, which does not have an age limit)
- Older carers aged 60+ (from 65) recognising that caregiving obligations can arise sooner than traditionally anticipated, particularly within the context of an evolving family structure and changing societal dynamics. This adjustment seeks to ensure that those who commit to caregiving roles receive the necessary assistance and recognition, thereby promoting the well-being of both caregivers and care recipients.

6. Option 2: Empower Self-Definition

- Removing age restrictions allows organisations to define "older people" based on their community's context. This option promotes inclusivity and flexibility while trusting organisations' insights on who they serve.

¹https://www.ageuk.org.uk/globalassets/age-uk/documents/reports-and-publications/later_life_uk_factsheet.pdf

²Emily Head, *Life expectancy declining in many English communities even before pandemic*, 2021, <https://www.imperial.ac.uk/news/231119/life-expectancy-declining-many-english-communities/>

³ Trust for London, <https://trustforlondon.org.uk/data/life-expectancy-borough/>

7. Option 3: Maintain Current Criteria

- Keeping the existing age parameters acknowledges the validity of the current approach and maintains continuity for applicants and stakeholders.
8. Of the three options presented, it is recommended that the Funding Committee approve Option 2 – empower self-definition and remove age restrictions. This option would place more trust in the organisations applying and allow the communities that they work with to define what age older people are. Option 2 also allows for the understanding of differing life expectancies in boroughs and the feedback that aging can intersect with the inequalities that communities already experience in different ways. The recommended option represents a forward-looking approach that aligns with our mission and values, fostering greater impact and inclusivity.
 9. This change could expand our funding to a wider number of organisations, amplifying our impact in this area. Although it may lead to an increase in the number of applications we may receive, CBT would proactively monitor any increase and respond accordingly with regards to its impact on the overall grants budget and assessment capacity. Guidance will be provided for assessors to ensure that activities and organisations funded in this area are specifically targeted and marketed towards older people. An age limit could be reintroduced, by Funding Committee should circumstances warrant it at a later date. This dynamic approach underscores our commitment to ensuring that our grant allocation strategies remain agile and responsive to the changing landscape.

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