



# Funding Committee of the City Bridge Foundation Board

Private Agenda

**Monday, 16 September 2024**



Bridging London,  
Connecting Communities



**CITY BRIDGE  
FOUNDATION**



**Date: MONDAY, 16 SEPTEMBER 2024**

**Time: 1.45 pm**

**Venue: COMMITTEE ROOMS, WEST WING, GUILDHALL AND VIA MICROSOFT TEAMS**

**Members:** Deputy Paul Martinelli (Chair)  
Deputy Nighat Qureishi (Deputy Chair)  
John Griffiths  
Deborah Oliver  
Deputy James Thomson  
Jannat Hossain (Co-opted Member)  
Holly Piper (Co-opted Member)  
Cliff Prior (Co-opted Member)  
Karin Woodley (Co-opted Member)

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

**Simon Latham**  
**Acting Managing Director**  
**of City Bridge Foundation**

## **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 16 June 2024.

**For Decision**  
(Pages 7 - 12)

**4. OUTSTANDING ACTIONS\***

Report of the Town Clerk

**For Information**  
(Pages 13 - 14)

**5. CHIEF FUNDING DIRECTOR'S UPDATE REPORT**

Report of the Chief Funding Director

**For Information**  
(Pages 15 - 24)

#### **Finance**

**6. BUDGET MONITORING REPORT FOR CBF FUNDING ACTIVITIES: PERIOD ENDED 31 JULY 2024**

Report of the Chief Funding Director and the CBF Finance Director

**For Information**  
(Pages 25 - 30)

#### **Bridging Divides - Funding Applications**

**7. SUMMARY OF BRIDGING DIVIDES\***

To note a summary of the Bridging Divides programme.

**For Information**  
(Pages 31 - 32)

**8. STRATEGIC INITIATIVE: LONDON LEGAL SUPPORT TRUST**

Report of the Chief Funding Director

**For Decision**  
(Pages 33 - 78)

**9. GRANT FUNDING ACTIVITY: PERIOD ENDED 27 AUGUST 2024**

Report of the Chief Funding Director

**For Decision**  
(Pages 79 - 122)

**Other**

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

**11. EXCLUSION OF THE PUBLIC**

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

**For Decision**

**Part 2 - Non-Public Agenda**

**Governance and Strategy**

**12. NON-PUBLIC MINUTES**

To agree the non-public minutes of the meeting held on 10 June 2024.

**For Decision**  
(Pages 123 - 132)

**13. FUTURE FUNDING POLICY**

Report of the Chief Funding Director

**For Decision**  
(Pages 133 - 148)

**14. EXTENDED PROGRAMME PAUSE AHEAD OF THE FUTURE FUNDING POLICY (FFP) AND FUTURE BUDGET MODELLING**

Report of the Chief Funding Director

**For Information**  
(Pages 149 - 170)

## **Bridging Divides - Funding Applications**

- 15. PIPELINE OF STRATEGIC INITIATIVES**  
Report of the Chief Funding Director

**For Information**  
(Pages 171 - 186)

### **Other**

- 16. 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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CITY BRIDGE  
FOUNDATION

## FUNDING COMMITTEE OF THE CITY BRIDGE FOUNDATION BOARD

Monday, 10 June 2024

Minutes of the meeting of the Funding Committee of the City Bridge Foundation Board held at Committee Rooms, West Wing, Guildhall and via Microsoft Teams on Monday, 10 June 2024 at 11.00 am

### Present

#### Members:

Deputy Paul Martinelli (Chair)  
Deputy Nighat Qureishi (Deputy Chair)  
John Griffiths  
Deborah Oliver  
Deputy James Thomson  
Jannat Hossain (Co-opted Member)  
Holly Piper (Co-opted Member)  
Cliff Prior (Co-opted Member)  
Karin Woodley (Co-opted Member)

#### Officers:

David Farnsworth	- Managing Director of City Bridge Foundation
Sacha Rose-Smith	- CBF Chief Funding Director
Fiona Rawes	- CBF Philanthropy Director
Samantha Grimmett-Batt	- CBF Funding Director
Geraldine Page	- CBF Funding Director
Rebecca Roberts	- CBF Funding Director
Tim Wilson	- CBF Funding Director & Social Investment Fund Manager
Julia Mirkin	- CBF Funding Manager
Caspar Cech-Lucas	- CBF Funding Manager
Lydia Parr	- CBF Funding Manager
Milly Ehren	- CBF Head of Strategy & Governance
Ruth Feder	- CBF Head of Impact & Learning
James Lee	- CBF Bridge Programme & Total Assets Lead
Francis Katakwe	- CBF Charities Technical & Strategic Finance Manager
Anne Pietsch	- Comptroller & City Solicitor's Dept.
Joseph Anstee	- CBF Governance Manager

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

#### 1. APOLOGIES

There were no apologies.

2. **DECLARATIONS OF INTEREST**

Karin Woodley declared a standing interest in Item 10 by virtue of being a member of London Youth and a standing interest in Item 11 by virtue of being a member of Locality. Karin Woodley further noted a personal interest in Item 21 by virtue of a previous professional connection with the CEO of Bankside Open Spaces Trust.

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

3. **TERMS OF REFERENCE\***

**RESOLVED** – That the Committee receive the resolution of the City Bridge Foundation Board on 16 May 2024 appointing the Committee and approving its terms of reference.

4. **MINUTES**

**RESOLVED** – That the public minutes and non-public summary of the meeting held on 4 March 2024 be agreed as a correct record.

5. **OUTSTANDING ACTIONS\***

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

**RESOLVED** – That the outstanding actions list be noted.

6. **CHIEF FUNDING DIRECTOR'S UPDATE 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, adding that Members were welcome to contact officers regarding questions or comments on the various workstreams between meetings.

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

7. **SUMMARY OF BRIDGING DIVIDES\***

The Committee noted a summary of the Bridging Divides programme.

8. **POSSIBLE**

The Committee considered a report of the Chief Funding Director seeking approval for a funding award of £496,515 over three years to Possible to contribute to the Get Shady Project. The Chief Funding Director introduced the report and presented the proposal to Members, noting that the application had been referred to Committee following further work arising from queries raised in considering the application under delegated authority.

A Member voiced their support for the application and suggested that the Committee agree an uplift to £525,000, providing an even split of £175,000 over the three years of the grant, on the basis that this would provide contingency for a project which would potentially be expensive to implement. Conversely, another Member expressed reservations regarding the scheme's experimental



nature and potential difficulty in measuring success, and commented that the Committee could consider agreeing a reduced award, either in duration or amount, as a starting point.

In response, the Chief Funding Director advised of the successful rollout of similar projects in the London Boroughs of Camden and Hackney, as well as elsewhere, adding that officers would provide annual monitoring reports on the grant. The Chief Funding Director further provided a more detailed breakdown of the grant spend.

The Chair noted the different views expressed and suggested that the Committee agree the award as per the recommendation, noting that additional funding could be considered at a later stage depending on the progress of the grant, which was supported.

**RESOLVED** – That the Funding Committee of the City Bridge Foundation Board, in the discharge of functions for the City Corporation as Trustee of City Bridge Foundation (charity reg. no. 1035628) and solely in the charity's best interests, award Possible £496,515 over three years (£170,853; £153,473; £172,189) to contribute to the Get Shady Project Manager salary and the associated street tree project costs.

#### 9. **INFRASTRUCTURE FUNDING - MEDIA TRUST**

The Committee considered a report of the Chief Funding Director seeking approval for a funding award of £282,675 over two years to Media Trust to work with a cohort of 10 City Bridge Foundation grantees per year on the Telling Your Stories project. The Chief Funding Director introduced the report and presented the proposal to Members, noting that the application had been referred to Committee following further work arising from queries raised in considering the application under delegated authority.

The Chair commended the success of the scheme to this point and the quality of output, which was highly regarded by officers, before drawing the Committee's attention to the recommendations, which were agreed.

**RESOLVED** – That the Funding Committee of the City Bridge Foundation Board, in the discharge of functions for the City Corporation as Trustee of City Bridge Foundation (charity reg. no. 1035628) and solely in the charity's best interests, award Media Trust £282,675 over two years (£139,553; £143,122) to work with a cohort of 10 City Bridge Foundation grantees per year on the Telling Your Stories project.

#### 10. **STRATEGIC INITIATIVE: LONDON YOUTH**

The Committee considered a report of the Chief Funding Director seeking approval for a proposed strategic initiative with London Youth to support and strengthen London's grassroots youth organisations. The Chief Funding Director introduced the report and presented the proposal to the Committee, noting that London Youth currently represented around 640 youth groups, to the benefit of over 100,000 young people in London.

A Member suggested that the Committee consider an uplift to £990,000, with an even split of £330,000 over the three years of the strategic initiative, on the basis that this would be a worthwhile investment and of substantive benefit to the grantee, noting the statistics provided within the report and the longstanding concerns within the sector.

In response to a request for clarification from the Chair, officers confirmed that infrastructure funding was not currently centrally funded, but that this would be discretionary and the proposals did not constitute replacement of statutory funding. The Chief Funding Director added that whilst the suggested uplift was appreciated, it would be affected by the budgetary implications of subsequent recommendations on the agenda and should be considered in the round, and on this basis recommended that the grant be considered as presented.

The Chair thanked Members for their comments and drew the Committee's attention to the recommendations, which were agreed.

**RESOLVED** – That the Funding Committee of the City Bridge Foundation Board, in the discharge of functions for the City Corporation as Trustee of CBF and solely in the charity's best interests, award £750,000 over three years (3 x £250,000) to London Youth to support and strengthen London's grassroots youth organisations.

**11. GRANT FUNDING ACTIVITY: PERIOD ENDED 23 MAY 2024**

The Committee considered a report of the Chief Funding Director providing details of funds approved and rejected under delegated authority since the last meeting, the remaining 2024/25 grants budget, grants spend to date and for this meeting and any grant variations approved under delegated authority. The Chair introduced the item and asked that officers review the way the grants spend by London Borough was calculated for the City of London, as the current method made this appear abnormally high, giving an inaccurate impression.

The Chair then drew the Committee's attention to the applications over £500,000 recommended for rejection, which were agreed.

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

- i) Receive this report and note its contents; and
- ii) Agree the 4 grant rejections outlined in the schedule attached to the report.

**12. THE BRIDGE PROGRAMME - EVALUATION AND NEXT STEPS**

The Committee received a report of the Chief Funding Director outlining the progress of the third phase of the Bridge Programme, through which a range of non-financial support is offered to funded organisations, key learnings to date, the future direction of the programme and the most recent evaluation report. The Chief Funding Director introduced the report and drew Members' attention to the

key points, also highlighting the effective support of Rocket Science as Learning Partner and Manager of the programme and support from the CBF Communications and Engagement team.

In response to a question from the Deputy Chair, the Chief Funding Director advised that there was no set timeline on the exploring further integration of some aspects of the Bridge Programme into the core work of the funding team, and this would be considered in conjunction with implementation of the recommendations of the End to End Review and future funding direction work.

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

- i) Note the update on the third phase of the Bridge Programme;
- ii) Note the Interim Review Report of the Bridge Programme – Review & Reset; and
- iii) Note proposals for further improvements to be made to the Bridge Programme.

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

There was no other business.

**14. EXCLUSION OF THE PUBLIC**

MOTION - That the public be excluded from the meeting for the following items of business below which relate to functions of the Court of Common Council not subject to the provisions of Part VA and Schedule 12A of the Local Government Act 1972 and which it is considered would not be in the best interests of the charity to disclose in a public meeting (engaging similar considerations as under paragraphs 2 and 3 of Schedule 12A of the 1972 Act).

**15. NON-PUBLIC MINUTES**

**RESOLVED** – That the non-public minutes of the meeting held on 4 March 2024 be agreed as a correct record.

**16. OPERATIONAL RISK REGISTER - FUNDING**

The Committee considered a report of the CBF Chief Operating Officer.

**17. END TO END REVIEW**

The Committee considered a report of the Chief Funding Director.

**18. FUTURE FUNDING DIRECTION UPDATE**

The Committee considered a report of the Chief Funding Director.

**19. PROGRAMME CLOSURES AHEAD OF FUTURE FUNDING DIRECTION**

The Committee considered a report of the Chief Funding Director.

20. **SUPPORTING CAMPAIGNING, ADVOCACY, AND POLITICAL ACTIVITY\***  
The Committee received a report of the Chief Funding Director and the CBF Communications & Engagement Director.
21. **BANKSIDE OPEN SPACES TRUST - DEVELOPMENT OF MARLBOROUGH SPORTS GARDEN**  
The Committee considered a report of the Chief Funding Director.
22. **DEVELOPMENT OF HELEN BAMBER FOUNDATION'S TRAUMA CENTRE**  
The Committee considered a report of the Chief Funding Director.
23. **SOCIAL INVESTMENT RECLASSIFICATION**  
The Committee received a report of the Chief Funding Director.
24. **PIPELINE OF STRATEGIC INITIATIVES\***  
The Committee received a report of the Chief Funding Director.
25. **DECISIONS TAKEN UNDER DELEGATED AUTHORITY OR URGENCY\***  
The Committee received a report of the Town Clerk.
26. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE AND ANY OTHER BUSINESS THAT THE CHAIR CONSIDERS URGENT AND WHICH THE COMMITTEE AGREES SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**  
There were two items of other business.

**The meeting ended at 12.23 pm**

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Chair

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**[joseph.anstee@cityoflondon.gov.uk](mailto:joseph.anstee@cityoflondon.gov.uk)**



### Funding Committee of the City Bridge Foundation 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.	10 June 2024	Grants Spend by London Borough for City of London	Emma Horrigan	September 2024	September 2024	On review, it was found that an error had entered the heat map calculations. The data processing has been checked and is corrected in the Grant Funding Activity report for this meeting.	

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<b>Committee:</b> Funding Committee of the City Bridge Foundation Board	<b>Date:</b> 16 September 2024
<b>Subject:</b> CBF Chief Funding Director's Update Report	<b>Public</b>
<b>Report of:</b> Sacha Rose-Smith, CBF Chief Funding Director	<b>For Information</b>

## 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: Suicide Prevention, End-to-End Review and Bridge Programme, Anchor Programme, Propel, Collaboration Circle, Trans Inclusion Policy, LocalMotion, Bridging Divides Strategy Evaluation, Spotlight Talk for Funded Organisations, Learning Visits, Social Investments, CBF Board Strategic Away Half-Day and Media Coverage.

## Recommendations

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

- i) Note the contents of the report.

## Main Report

### Funding Updates

1. The month of August saw appalling scenes of violence across the country. CBF put out a supportive message on social media and emailed all of our grantees offering them solidarity, and being explicit that we would be flexible in terms of meeting deadlines and their approach to managing their CBF funded work at this time. Many emails of acknowledgment and thanks were received in response. Officers are also aware of the broader work in the sector, such as the funder letter for urgent sustainable change (**see Appendix 1**).
2. The letter highlights a range of important points. The focus on not responding to urgent and emergent issues in a short-term way is one that CBF supports, and this mirrors the long-term approaches CBF has been implementing in recent years such as ten-year programmes Propel and Anchor, and the move from 3 to 5-year funding. There is more to do though, and the Future Funding Policy (FFP) will include consideration of how to take a systemic approach to tackling the drivers of inequality and injustice in London, and CBF policy will be a 10-year policy recognising and reinforcing the requirements for long-term thinking and funding.
3. The letter does make an ask for contributions to a fund for emergency work. In the past this is something officers would have considered, but it is not possible to contribute this time with our current budgetary limitations. Moving forward CBF will continue to be active participants in the Funders for Race Equality audit (which



CBF also fund) and the DEI data standard. It is imperative to continue to improve the approach to collecting data needed to be able to analyse trends related to racial justice and the impact of CBF funding and policies on communities of colour. CBF has also recently committed funding to some further research into the DEI data standard. Racial justice is not just about what is funded, but how it is funded, and is a key driver for the End-to-End review to ensure CBF is a more equitable funder in its practice.

### Suicide Prevention

4. Both strands of the Suicide Prevention Funding Programme have now closed for applications. 101 applications, with a total value of £16.5m, were received under Making London More Liveable. These are currently under assessment by Funding Managers, and final decisions on Making London More Liveable assessments will be made under delegated authority in October. 35% of applicants unsuccessful at the first stage of assessment have taken up the opportunity for a feedback call.
5. CBF received 22 applications for Strategic Partnership Funding, with a total value of £20.8m. Nine of these will be progressing to full assessment, and then on to CBF Board and Funding Committee for decisions in November and December. Involvement of a lived experience advisory group is continuing throughout the assessment process. The team is currently liaising with City Corporation procurement to finalise the recruitment of a learning partner for the programme.

### End-to-End Review and Bridge Programme

6. Implementation of the End-to-End Review (E2ER) recommendations is being scheduled, alongside the development of the FFP, ongoing Salesforce utilisation work, and other charity-wide projects, focussing on impact measurement and risk appetite. More immediate focus is on implementation of E2ER recommendation 10, *'to connect Funding Managers more closely to the Bridge Programme'*; E2ER recommendation 2, *'to accept applications and grant reporting in different formats for groups that need it'*; and E2ER recommendation 9, *'to offer core and possibly unrestricted funding (where possible) as standard practice'*.
7. Meetings with Pears Foundation and Esmee Fairbairn Foundation are informing implementation of the core funding recommendation. The work of Trust for London, specifically that of the Disability Justice Fund, jointly funded by CBF, is informing how to prepare for the receipt of funding applications and grant reporting documents in different formats. Finally, Bridge Programme development work is underway, being led by James Lee, Bridge Programme and Total Assets Lead, who is researching how CBF can diversify the pool of consultants used to deliver the programme, and also the range of funder plus activities offered. Officers are considering how to contract Bridge Programme providers directly and are developing a policy that will determine which applicants can access the Bridge Programme and to what extent, along with associated financial modelling. Finally, work has started to consider how the proposed developments of the Bridge Programme will impact on the work of Funding Managers, so that this can inform work planning and staff training arrangements.





## Anchor Programme

8. The Anchor Programme aims to support equity-led infrastructure organisations by supporting them to deliver systemic change by awarding long-term core grants. Since Round One grants were awarded in 2023, the Learning Partner, The Social Innovation Partnership (TSIP) continues to run workshops with the round one Anchor cohorts and will be facilitating sessions on 10 and 12 September to further conversations around systems change from both funder and funded organisation perspective.
9. Heads of Anchor programme, Clara Espinosa and Khadra Aden, are now working full-time on the Anchor Programme. A team of Funding Managers are being supported to carry out Anchor assessments with the aim of bringing them to December's Committee meeting and February's CBF Board. Meetings have been scheduled with other funders to share learnings.
10. The Anchor Programme Round Two received 73 expression of interest applications, of which 13 submitted a stage two application form by 15 July. The assessment period started at the end of July and will continue until mid-November. An information session was delivered in July sharing the key learnings from Round One and changes to round two of the programme, this was an opportunity for a couple of Round One funded organisations to share their experiences of applying to the Anchor programme and the impact the funding will have. In addition to this, Funding Managers have undertaken three systems change training sessions with an additional session being delivered in October. As piloted in Round One, a buddy system has been implemented whereby Funding Managers support one another with assessments, sharing expertise and attending weekly meetings to discuss individual assessments.

## Propel

11. Propel is a funder collaboration stewarded by London Funders, building on the response to the Covid-19 pandemic, beyond an emergency context, to provide strategic and long-term funding at scale for systems change work (fundamental change that affects how the whole system functions). £3.5m is due to be spent on the 'Expand' programme (extending the original 12-month Explore grants for an additional two years) with £1.4m already awarded. The balance is expected to be awarded within this financial year.
12. A number of 'Deliver and Develop' grants awarded by other funders within the collaboration were for two years, rather than three. This was primarily due to budgetary constraints. CBF, along with two other funders, are considering 'Extend' grants for 12-months for these organisations, to ensure that all 'Deliver and Develop' grants have a total of three years' funding. Working with the original funders of these grants (the GLA and London Legal Support Trust) officers will be assessing 12 organisations, with a view to having decisions by December 2024. The assessment process will reflect the principles uniting the Propel funders of being flexible, sharing power and being equitable, by utilising the existing knowledge, relationships and monitoring with the original funders, and ensuring that information requested from the organisations is proportionate, recognising that



these grants are for 12 months, and each organisation has been assessed and managed by other Propel funders.

13. Propel has been shortlisted for Charity Times' [Charity Collaboration of the Year](#). Propel is the first time cross-sector partners have come together from the funding and equity sectors to create a long-term funding collaboration at scale, where historically underfunded groups are being prioritised. The winners will be announced on 25 September at the Awards Gala dinner in London, where officers will represent CBF.

#### Collaboration Circle

14. [Collaboration Circle](#) is a subsidiary company of London Funders. A new space for funders and civil society to design, learn and make funding decisions together, it will hold 'pooled' money on behalf of multiple cross-sector collaborations, and be a space where people from across the funding and social justice sectors come together to design and decide how this money should be used. Sam Grimmett, Funding Director, sits on the Collaboration Circle board. London Funders has recently been awarded a grant for a Knowledge Transfer Partnership Coordinator with London Metropolitan University to support the set-up of the model – the University will provide a staff member based in London Funders for two years, supported by two high level academics (a Professor of Organisational Leadership and the Deputy Head of Accounting Banking and Finance). Together, they will provide the legal, financial, and organisational expertise to establish an effective and scalable subsidiary with a best-in-class model for holding pooled funds.

#### Trans Inclusion Policy - Women and Girls Consultation Collaboration

15. At the Funding Committee meeting on 4 March 2024, the adoption of the Trans Inclusion Policy was discussed (with the decision to formally adopt delegated to the Managing Director of CBF). Officers confirmed after the meeting that as part of the work to consult with groups both directly and indirectly impacted by the policy, a consultation via survey would be undertaken with women and girls' groups. It had been hoped to bring a summary of the results to this meeting. However, the decision was taken to extend the survey response period by two weeks, due to the summer holiday period making it difficult for groups to respond within a shorter timeframe. The results have been received and will be reviewed, and will therefore be submitted to the December Funding Committee. The policy has also been circulated to participants in the trans organisations roundtable for comment.

#### LocalMotion

16. CBF is a key partner in LocalMotion, a strategic collaboration with other funders operating outside London. CBF has recently agreed to contribute a further £5M over the next seven years to support on-going activities in Enfield and towards the administration of LocalMotion, including learning capture and dissemination, for the benefit of Londoners. At the February CBF Board meeting, it was agreed that considerations for CBF regarding the future hosting arrangement of LocalMotion's grants administration would be made under delegated authority by the MD in



consultation with the Chair and Deputy Chair of the CBF Board. Following extensive discussions between the participating funders and affected employee, it has been decided that having the City Corporation as trustee of CBF hosting the LocalMotion grants administration was not an optimal arrangement for either LocalMotion or CBF, and the hosting will remain with Lloyds Bank Foundation. We remain a key and active partner in LocalMotion.

## Impact and Learning Updates

17. Bridging Divides Strategy Evaluation – The Impact and Learning team; Ruth Feder, Emma Horrigan and Natalie Heath, completed an evaluation of the Bridging Divides strategy, bringing together data, feedback from funded organisations and colleagues and reports from Renaisi (the strategy’s learning partner) during the previous five years. The evaluation focused on learning from the current strategy and applying this to recommendations for the FFP, forming part of the FFP review.
18. Spotlight Talk for Funded Organisations – The Impact and Learning team, along with James Lee, Bridge Programme Lead and with the support of Caspar Cech-Lucas, Small Grants Programme Manager, facilitated an interactive, panel discussion & networking session celebrating small charities. Panel members included National Council for Voluntary Organisations (NCVO), CoDa Dance, Jazanne Arts and Forest Gate Community Garden. Over 80 funded organisations, funders and CBF colleagues attended the event or watched it on YouTube.
19. Learning Visits – Due to the heavy workload of Funding Managers caused by the surge in funding applications, learning visits have been paused. It is hoped to restart these in January 2025.

## Social Investment Updates

20. Officers have been working on a substantial investment recommendation towards inclusive sporting facilities in East London. It was not possible to complete due diligence in time for today’s meeting, but is expected to be submitted for recommendation to the December Committee. Officers can provide an oral update in non-public if this would be helpful.
21. Of the social investments approved since the Funding Committee began oversight: legals have been signed and funds drawn for the £240k towards Helen Bamber Foundation’s new premises in Old Street (June 2024 meeting); legals are underway for the £1m towards Bankside Open Spaces Trust’s redevelopment of Marlborough Sports Garden (June 2024 meeting) and with Commonweal for the £0.5m towards its work addressing serious youth violence (December 2024). Legals have yet to start with Naked House for the £160k towards affordable housing in Enfield (delegated authority, July 2024). Officers will prepare a pro forma portfolio report to enable the Committee to see progress against all investments in time for the next meeting.
22. Since the June 2024 meeting, Big Issue Invest, which acts as security trustee for the investors in HCT (formerly Hackney Community Transport), has confirmed CBF will receive part-payment of its outstanding capital. Following October 2017



approval by the Social Investment Board (SIB), CBF invested £0.5m in HCT for working capital (a total of £0.5m divided equally between junior and senior bonds). HCT reported significant trading difficulties in late 2019 and in February 2020 the Chair and Deputy Chair agreed a provision that 95% of the value of CBF's investment would be lost. HCT entered administration shortly after, and BII has been working to recover capital for the investors. CBF expects to receive £175k of capital in the coming weeks (35% of the original investment) with a further, smaller recovery expected later in the year.

## Governance Updates

23. Strategic Away Half-Day – The CBF Board's Strategic Away Half-Day meeting is scheduled for the morning of Wednesday 9 October 2024, with all CBF Board and Funding Committee Members invited to attend. The Strategic Away Half-Day will be held at Toynbee Hall (28 Commercial St, London E1 6LS) from 9am until 2pm. Refreshments and lunch will be provided, and transport from Guildhall to Toynbee Hall can also be arranged for Members. An agenda and precise timings will be circulated closer to the meeting.

## Communications Updates

24. Media Coverage – There were 37 items of media coverage in July and August, of which 16 related to funding, and the remainder about the Foundation more broadly. Coverage included reports on [BBC London News](#) and [BBC Radio London](#) on a £136,400 City Bridge Foundation grant to Spitalfields City Farm, supporting activities include a 'Farm2Fork' club for children and a group for older women from Bangladeshi communities.

25. Sunday Express (print edition) carried a double-page spread on the photographic exhibition launched to mark the 130<sup>th</sup> birthday of Tower Bridge, and the wider work of City Bridge Foundation and its funded organisations. Meanwhile the Foundation's poet-in-residence Cecilia Knapp appeared on [Times Radio](#) (listenable internally) on a segment in which presenter Ed Vaizey tried to guess the occupation of people with unusual jobs.

## Conclusion

26. This report provides a high-level summary of CBF activities since the Funding Committee last met in June 2024. 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.

## Appendices

- Appendix 1 - Joint letter from Civic Power Fund, Funders for Race Equality Alliance, Justice Together Initiative and Migration Exchange

## Sacha Rose-Smith

Chief Funding Director

E: [Sacha.Rose-Smith@citybridgefoundation.org.uk](mailto:Sacha.Rose-Smith@citybridgefoundation.org.uk)

## Joint letter from Civic Power Fund, Funders for Race Equality Alliance, Justice Together Initiative and Migration Exchange



**15 August 2024**

Our partners and networks have been raising the alarm about systemic racism, injustice and violence for many years. Around the country, people and communities are already organising and working to support Global majority people, Muslims, migrants, refugees and those seeking asylum, and to tackle hate crime and structural racism. Many also provide vital services, practical advice, and support dealing with harm created by the hostile environment.

Our combined research shows that it is well known that [funding for justice work is too limited and unsustainable](#), and that [‘by and for’ organisations are underfunded](#) and [face structural barriers](#) (see also [here](#)).

Systems change work needs deep, long-term investment and care in the most affected communities. Recent riots and an emboldened far right events galvanise increased action and resources for anti-racist work, racial and migration justice, and tackling the far right, islamophobia and anti-semitism. Impacted people and leaders with lived experience, grassroots organisations, global majority working in philanthropy must be at the centre of this conversation and the power dynamics in funding have to change for good.

**We do not want to address this urgency with short-term response and commitment.**

As the situation develops, we will adapt our work and build on learning from previous efforts to mobilise resources and centre anti-racism. We are committed to working in partnership to support organisations and to coordinating our efforts to support equitable and transformative long-term funding responses.

We are working as a collective to bring our combined networks, infrastructure and skills to focus on four key priorities:

- 1. Emergency support for organisations on the front line to stay safe, particularly ‘by and for’ organisations**

Civic Power Fund has made available their regrant capacity, so that resources can be swiftly distributed through an Emergency Action Fund. Justice Together Initiative, Funders Race Equality Alliance and Migration Exchange are supporting through their coordination, insight, networks and convening power.

We are seeking immediate top up of this Fund, which is for financial support for people who are afraid to leave their homes, for travel, food cost, resourcing community support spaces and costs associated with salaries, office and security measures.

[You can find more information here.](#) So far Civic Power Fund has distributed c. £40,000 to 40 frontline groups. Support needs range from investing in urgent organising and safety training; paying to keep safe spaces open longer than usual; costs to cover urgent convening; and reinforcing organisational and individual safety.

## **2. Support for people from racialised communities to connect with peers, access well-being support, and centre anti-racism in the wider sector response**

We have a number of existing initiatives that have been co-designed with partners which focus on the wellbeing of global majority people working in the race, migration and philanthropic sector that still need funding. These include:

[Taking Care of You Programme](#): A wellbeing programme run by the Black Wellbeing Collective for racialised people who work in the Migration Sector. (£50k) Core costs to run the Black Wellbeing Collective (£115k)

Employee Assistance Programme run by the [Black Wellbeing Collective](#) for people who work in the migration sector including therapeutic sessions and a platform for toolkits, community meet ups and useful support info. (£115k)

[The Exhale Retreat](#): Created as a result of Black Lives Matter and Covid-19, this retreat is a 'by and for' space aimed at Black women who work in philanthropy and/or third sector to build a community, experience joy, share experiences and just 'be' (110k)

[Reimagining Horizon](#): Created as a 'by and for' wellbeing programme in response to the number of people who continue to experience harmful racialised experiences of working in philanthropy. This programme is also working on creating an resource for funders who seek to create anti-racist and anti-oppressive work culture and environment (150k)

[Future Foundations UK](#): Future Foundations UK was born out of the common experiences and insights of People of Colour working in philanthropy in the UK. It is a supportive network for those working in the UK philanthropic sector to connect, create and lead change within the space. (110k)

[Shaping the Future Leadership Initiative](#): Created by MEX to bolster the leadership capacity and capability of organisations and networks in the refugee and migration sector. It aims for a holistic approach to leadership development, emphasising anti-oppressive practices, wellbeing, and sustainability while leveraging the inherent strengths found in field practice. (£150K)

[Racial Justice Programme](#): Created by [Justice Together Initiative](#). This program aims to improve the migration sector's understanding of how immigration policies intersect with racism and to empower them with the tools to implement anti-racist practices within their organisations. It also seeks to support and strengthen existing organisations focused on racial justice. (£100k)

### **3. Disseminate information on funding needs and collaboration opportunities and convene funders to avoid duplication and strengthen longer term efforts**

MEX already has an online event on **9<sup>th</sup> September** focused on migration under the new government. The funder-only session will be extended to an hour and there will be an opportunity to shape wider funder collaboration efforts for the longer term work. Please register for that session [here](#).

### **4. Solidifying funder commitment by monitoring your funding and ensuring it funds the most vulnerable by completing the [racial justice audit](#)**

FREA have created an audit tool which helps funders:

- Identify the trends, patterns and how much funding addresses racial justice work
- Produce a snapshot of current portfolios and create a baseline to track funding on a yearly basis
- Implement targets and strategies to ensure funders are advancing racial justice work
- Allow greater transparency of current foundation expenditure.

Commit to completing the audit once a year and use the results to build a case to increase sustainable and flexible funding for 'by and for' organisations. If you want to know more, please email FREA on [frealliance@equallyours.org.uk](mailto:frealliance@equallyours.org.uk).

If you wish to support or get involved with any of the key asks above, please get in touch with the Funders for Race Equality Alliance on [frealliance@equallyours.org.uk](mailto:frealliance@equallyours.org.uk) and we'll put you in touch with the relevant team.

Alongside this, we urge you to fund the groups and organisations that are on the frontlines in the fight against hate and the far right. We all work with amazing groups in this space and can happily make introductions and referrals.

With best wishes

Tracey Agyeman (FREA)

Marchu Belete & Sarah Cutler (MEX)

Martha Mackenzie & Mohammed Afridi (Civic Power Fund)

Hazel Williams (JTI)





<b>Committee:</b> Funding Committee of the City Bridge Foundation (CBF) Board	<b>Date:</b> 16 September 2024
<b>Subject:</b> Budget Monitoring Report for CBF Funding Activities: Period Ended 31 July 2024	<b>Public</b>
<b>Report of:</b> Chief Funding Director & the CBF Finance Director	<b>For Information</b>
<b>Report authors:</b> Solentine Mutwarasibo, Finance Business Partner and Sacha Rose-Smith, CBF Chief Funding Director	

## Summary

This report provides a financial update on the CBF Funding activities to 31 July 2024 and an updated forecast for the financial year ending 31 March 2025.

CBF Funding’s approved budget is £84.6m, comprising of £80.6m allocated to grant commitments, £3.7m to operational costs, and £0.3m to central recharges. The revised grants forecast for the year is £91.1m. Further details are provided at paragraphs 3 to 9 of this report.

## Recommendation

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

- a) Note the contents of the report.

## Main Report

### Background

1. In support of the budget monitoring oversight responsibilities of the Funding Committee of the CBF Board, this report presents a financial update on funding activities and the latest financial forecast for the year.
2. CBF holds a grant-making designated fund which represents surplus income set aside for funding grant-making activities. At the beginning of 2024/25, the unaudited grant-making designated fund held £160.0m. This represents the annual allocation of £30m, funds remaining from prior years’ regular allocations, alongside £94.4m remaining from the £200m uplift approved in March 2020. Appendix 1 depicts the grant-making designated fund analysis.



## Grants

### CBF Funding's Actual Spend v Budget

	Year to Date 31 July 2024			Annual - 2024/25		
	Actual £'000	Latest Approved Budget £'000	Variance £'000	Forecast Outturn £'000	Latest Approved Budget £'000	Variance £'000
<b>Operational Costs</b>						
Employees	(897)	(982)	85	(2,900)	(2,943)	43
Consultants	(93)	(101)	8	(283)	(283)	-
General and administrative	(100)	(147)	48	(470)	(470)	-
<b>Total Operational Costs</b>	<b>(1,089)</b>	<b>(1,230)</b>	<b>140</b>	<b>(3,653)</b>	<b>(3,696)</b>	<b>43</b>
<b>Grant Commitments</b>						
Grants	(23,173)	(33,453)	10,280	(91,100)	(80,610)	(10,490)
<b>Total Grant Commitments</b>	<b>(23,173)</b>	<b>(33,453)</b>	<b>10,280</b>	<b>(91,100)</b>	<b>(80,610)</b>	<b>(10,490)</b>
<b>Recharges</b>	-	-	-	(333)	(333)	-
<b>Total Net Expenditure</b>	<b>(24,262)</b>	<b>(34,683)</b>	<b>10,420</b>	<b>(95,086)</b>	<b>(84,639)</b>	<b>(10,447)</b>

- At the end of July 2024, grant commitments were £23.2m against the year-to-date budget of £33.5m. The variance of £10.3m is due to planned development in Propel, Suicide Prevention and Anchor programmes timelines that were amended, moving commitments to later in the year.
- Following reviews, the grant commitments forecast for the year has been revised to £91.1m against a budget of £80.6m, with the increase utilising funds already held within the designated fund. The revised forecast considers the analysis of the first quarters grant commitments, current assessments in hand, and application trends across the last six months.
- A change in the Propel design timeline has led to some of the proposed commitments being brought forward from 2025/26 to 2024/25, with an increase in the forecast of £3.1m.
- The Anchor programme's budget has been revised upwards, to include £2.1m revocations from 2023/2024.
- Following a review of the level of applications and an increase in demand for many of the services funded under CBF's responsive programmes, the grants forecast for this area has been revised upward by £2.3m against the original budget of £46m. This has been covered by unspent Bridge Programme commitments and funds from the £200m uplift previously allocated to future years.



8. One year continuation funding of £3m has been made available to relevant grantees due to closures of the responsive programmes approved at the last Funding Committee meeting.
9. Detailed analysis of the grants committed to date can be found within the Grant Funding Activity Report.

## **Operational Costs**

### Employee Costs

10. The year-to-date reported underspend of £85k on staff cost arises from a vacancy plus a correction required as the Impact & Learning Team were reported within the Communications Team.

### Consultants Fees and Supplies and Services

11. Consultants' fees and Supplies and Services year-to-date underspends are due to events and activities now planned to take place in Quarter 3 and Quarter 4. Supplies and services expenditure relates to software maintenance and support, legal fees, professional fees, hospitality, subscriptions and other offices expenses.

## **Cost Recovery**

12. This heading includes activities undertaken by the City Corporation on behalf of the Funding Team, with costs being recovered for Human Resources, Digital Services, and premises costs. The City Corporation's Chamberlain's Department have agreed that these will now be processed on a quarterly basis, rather than solely at year-end. The amount included for 2024/25 is subject to review following the revised methodology agreed in May 2024.

## **Conclusion**

13. The Funding team is delivering strongly on its grants programmes with high value commitments forecasted in Quarter 3 and 4 through Suicide Prevention, Propel, Continuation funding and Anchor programmes accounting for more than the £10.5m than originally budgeted.

## **Appendices:**

- Appendix 1 – CBF Grants Designated Fund Analysis

### **Solentine Mutwarasibo**

Finance Business Partner

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### **Sacha Rose-Smith**

CBF Chief Funding Director

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## Appendix 1: CBF Grants Designated Fund Ar

Year	CBF Annual Allocation				£200m Uplift		
	Opening Balance	Grants expenditure	Transfer	Closing Balance	Opening Balance	Grants expenditure	Transfer
	£m	£m	£m	£m	£m	£m	£m
2019/20	22.40	(30.50)	27.30	19.20	0.00	0.00	200.00
2020/21	19.20	(26.40)	14.10	6.90	200.00	0.00	0.00
2021/22	6.90	(21.85)	31.30	16.35	200.00	(6.05)	0.00
2022/23	16.35	(15.20)	31.00	32.15	193.96	(46.20)	0.00
2023/24	32.15	(26.59)	30.00	35.56	147.75	(53.31)	0.00
2024/25	35.56	(29.26)	30.00	36.30	94.44	(61.84)	0.00
2025/26	36.30	(26.60)	30.00	39.70	32.60	(27.40)	0.00
2026/27	39.70	(30.00)	30.00	39.70	5.20	(5.20)	0.00
2027/28	39.70	(30.00)	30.00	39.70	0.00	0.00	0.00

## Analysis

Closing Balance	Total			
	Opening Balance	Grants expenditure	Transfer	Closing Balance
£m	£m	£m	£m	£m
200.00	22.40	(30.50)	227.30	<b>219.20</b>
200.00	219.20	(26.40)	14.10	<b>206.90</b>
193.96	206.90	(27.90)	31.30	<b>210.30</b>
147.75	210.30	(61.40)	31.00	<b>179.90</b>
94.44	179.90	(79.90)	30.00	<b>130.00</b>
32.60	130.00	(91.10)	30.00	<b>68.90</b>
5.20	68.90	(54.00)	30.00	<b>44.90</b>
0.00	44.90	(35.20)	30.00	<b>39.70</b>
0.00	39.70	(30.00)	30.00	<b>39.70</b>

### Bridging Divides Eligibility Criteria

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

Connecting the Capital	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"> <li>a. Revenue funding.</li> <li>b. Eco audits.</li> <li>c. Capital funding</li> </ul>	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"> <li>a. Access audits</li> <li>b. Capital funding</li> </ul>	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 Foundation](https://www.citybridgefoundation.org.uk/what-we-fund)

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CITY BRIDGE  
FOUNDATION

<b>Committee:</b> Funding Committee of the City Bridge Foundation Board City Bridge Foundation Board	<b>Date:</b> 16 September 2024 19 September 2024
<b>Subject:</b> Strategic Initiative: London Legal Support Trust (Ref. 23852)	<b>Public</b>
<b>Report of:</b> Sacha Rose-Smith, Chief Funding Director	<b>For Decision</b>
<b>Report author:</b> Sandra Jones, Funding Manager	

## Summary

London Legal Support Trust (LLST) is a registered charity (number 1101906) which was initially incorporated (Company number 4930926) as the London Law Trust, changing its name to LLST, which registered as a charity in 2004. LLST works to assist voluntary sector legal advice agencies and law centres in London and the Home Counties by providing them with a range of support including grant funding. LLST is part of a network of seven Legal Support Trusts across England and Wales working with the Access to Justice Foundation to support pro bono and advice agencies. The charity has four core strands of work in support of free legal advice services in London which are raising funds to distribute as grants; working collaboratively with others to raise funds for the free legal advice sector; supporting the improved management and infrastructure of the sector through the Centres of Excellence programme; and helping reduce costs and save money through pro bono or discounted schemes.

This report requests funding of £1,440,363 over five years towards two previously funded programmes, the Centres of Excellence (CoEx) (funded under Bridging Divides) and a Strategic Initiative to develop and maintain a London-wide specialist advice forum (LSAF). City Bridge Foundation (CBF) has funded advice work for much of its history, with specific funding strands/priorities devoted to it during the current (Bridging Divides) and previous (Investing in Londoners) funding strategies as well as Strategic Initiatives. The programmes currently funded, CoEx and LSAF, are both due to finish their funding imminently and it is proposed that their funding be combined into one strategic grant.

## Recommendations

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

- i) Endorse the award of £1,440,400 over five years (£271,300; £279,400; £287,800; £296,500; £305,400) to LLST towards continuation funding to provide second tier infrastructure support through the previously funded Centres of Excellence programme and the London Specialist Advice Forum;
- ii) The above being subject to the financial assessment of LLST being undertaken by the funding team with sign-off received from the CBF Finance Director (in line with authority levels, this being a grant request above £1m);



- iii) Delegate the decision to approve the Grant Offer Letter (thereby formally committing to the funds) relating to the £1,440,400 set out in this report, to the Acting CBF Managing Director, Chair, CBF Board and Deputy Chair, CBF Board, in consultation with the CBF Finance Director.
- iv) Should there be substantive alterations to the arrangements set out in this paper, the decision outlined in the recommendation will return to the Funding Committee and CBF Board.

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

- i) Agree the award of £1,440,400 over five years (£271,300; £279,400; £287,800; £296,500; £305,400) to LLST towards continuation funding to provide second tier infrastructure support through the previously funded Centres of Excellence programme and the London Specialist Advice Forum, with the terms as endorsed by the Funding Committee.

## **Main Report**

### **Background**

1. Within legal support, three levels of advice are offered: information, generalist (with or without casework) and specialist. Information advice provides information only, such as leaflets or signposting. In broad terms, generalist advice services can identify legal issues and give clients the knowledge and guidance to resolve these and may take responsibility for moving the issue forward (case work); specialist advice organisations can undertake ongoing case work, as well as advocacy and representation. Specialist advice services may also indicate services delivering advice to a specified client group with a particular combination and/or complexity of legal needs (for example, women, disabled people, students, migrant communities etc).
2. CBF has a long history of funding the advice sector to address inequalities in London by enabling more Londoners to access debt and legal advice services for support before they hit crisis point. This has been a specific theme within BD. Funding advice work complements most of CBF's other funding streams such as those addressing homelessness or working with disabled people, migrants, refugees, and asylum seekers. This funding covers both generalist and specialist advice levels, and CBF is one of the few funders in London that include generalist level advice.
3. There have also been strategic grants such as projects partnering with the Legal Education Foundation (LEF) e.g., £500,000 towards an Immigration Advice grants programme (also supported by the Greater London Authority (GLA) and Trust for London) and, since 2016, supporting the provision of Justice First Fellowships (also supported by Esmee Fairbairn Foundation and Unbound Philanthropy) which



encourages and enables newly qualified lawyers to practice in the social justice arena. CBF has also partnered with LLST by jointly funding its CoEx project (since 2014) working with smaller organisations to capacity build their specialist advice. CBF also funds a London-wide advice sector forum and a one-off grant for a billing co-ordinator (a joint project with the LEF and LLST) to support agencies who get legal aid to bill the Legal Aid Agency properly and so make them more sustainable.

4. LLST have been one of our main partners over the years in supporting legal advice centred in being cost-effective and sustainable. They offer Grants Plus support through money-saving schemes and running or funding places on training courses depending on agencies' needs and offers advice, support and guidance where possible. In July 2022, CBF awarded £6,000,000 as our biggest Alliance Partnership for running costs and onward grant making as part of the Advice Skills Development Fund, which was part of Propels 'robust safety net' theme.

### **Current Application**

5. In addition to the Alliance Partnership funding, LLST have been funded over several years for two main programmes, the CoEx since 2014 and the LSAF since 2019. By merging the funding for these two programmes, LLST will be delivering on three outcomes.
6. Outcome 1 will increase access to specialist free legal advice provision in each local authority in London. This will be achieved by: engaging with 60 advice agencies through the CoEx; building more robust local partnerships/referral networks; act as a catalyst to engage specialist legal advice and small non-specialist agencies to increase advice offer to those in need; topic specific areas of advice training; provide infrastructure consultancy to ensure the agencies remain open to support their communities; support existing specialist agencies to work with local agencies to provide outreach services into advice deserts; tailored consultancy support for legal aid tendering and quality marks so advice agencies can secure contracts and deliver services to an accredited standard; provide employee assistance programmes to staff of the CoEX agencies.
7. Outcome 2 is to increase awareness of the need for specialist legal advice amongst key stakeholders, funders and policymakers. This will generate increased funding for this sector, including through partnerships, improving the ability of advice agencies to provide vital support to more Londoners and maintain longer-term sustainability. This will be achieved through the Advice Forum creating a platform to enable agencies to talk about the importance of their work; giving them access to funders to share their work; learning and feedback loop on current and emerging issues within the advice sector; awareness raising and a weekly newsletter.
8. Outcome 3 is to increase sustainability of existing organisations and developing specialist advice organisations, this will lead to more free legal advice providers having diversified funding bases, strengthening their resilience and maintaining lower overheads with shared learning and opportunities to develop collaborative



work and access peer support to enable robust communities of practice. This will be achieved by providing tailored consultancy and training; peer mentoring; money saving scheme, building partnerships within the sector, particularly between specialist and generalist agencies; building partnerships for procuring advice contracts and developing pilots based on self-identified needs.

9. By merging the two programmes, LLST have been able to ensure a comprehensive and effective offer based on consultation within the LSAF and an extensive review of the CoEx scheme (attached at Appendix B).
10. The funding requested is a merger of the two programmes and covers the costs of a FTE senior programmes manager, a FTE development officer and associated running costs. This merger yields some savings from the two separate schemes.

### Financial Information

11. The table below covers the financial year 2022 signed accounts (LLST financial year is January – December), with draft accounts for 2023 and management accounts for 2024. The 2024 budget shows a deficit of £557,760. This deficit is due to the timing of grants in and out of the account as well as the organisation attempting in 2024 to spend down the reserve surplus built up in 2023 (623,768). Their reserves policy of maintaining 6 months of general expenditure requires approximately £450,000 and their 2024 figures will be in excess of this. Going forward LLST will be looking for small surpluses, as it is not their intention to hold excessive reserves, especially considering their beneficiaries' ever-increasing demands, but they endeavour to hold unrestricted free reserves in line with their policy, which is reviewed appropriately in line with changing economic/financial condition. Draft forecast figures for 2025 anticipate an income of £4,233,150 and expenditure of £4,209,117 leaving a surplus of £24,033. Their financial track record bears this out.

Year end as at 31 December	2022	2023	2024
	Signed Accounts	Draft accounts	Management Accounts
	£	£	£
<b>Income &amp; expenditure:</b>			
Income	2,031,610	3,659,160	4,253,470
Expenditure	(1,675,881)	(3,076,153)	(4,811,230)
<b>Surplus/(deficit)</b>	<b>355,729</b>	<b>583,007</b>	<b>(557,760)</b>
<b>Reserves:</b>			
Total restricted	244,474	725,804	194,944
Total unrestricted	121,256	254,191	227,291
<b>Total reserves</b>	<b>365,730</b>	<b>979,995</b>	<b>422,235</b>
Of which: free unrestricted	490,833	623,768	596,868
Reserves policy target	332,000	309,201	450,000
Free reserves over/(under) target	158,833	314,567	146,868



## Conclusion

12. LLST play a pivotal role in supporting the efficiency and effectiveness of the advice sector in London and is a key partner for CBF in driving forward improvement in the sector. The programmes, which have been funded separately until now, have demonstrated how they have improved the sector, with the report in Appendix B identifying how effective the CoEx is along with recommendations going forward, which have been incorporated in their application along with feedback from the LSAF members.

13. The funds will enable this important infrastructure work to continue, important at this time with increased demand for legal advice given the cost-of-living crisis and the level of funding being competitive. Each outcome is designed for closer collaboration between funders and the sector as well as larger and smaller groups, improving on the quality of advice given to a range of communities, addressing inequalities. This funding will allow for the continuation of the sector working with funders to co-produce solutions.

## Appendices

- Appendix A: LLST Funding History
- Appendix B: Draft Review of the Centres of Excellence scheme; future development of the scheme

## Sandra Jones

Funding Manager

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## Appendix A: London Legal Support Trust Funding History

ID	Type	Meeting Date	Decision
20180	Inflationary Pressures Payment	12/06/2023	£11,900
19106	Bridging Divides	26/09/2022	£362,200 over two years (£176,100; £186,100) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
19437	Strategic Initiatives	20/06/2022	£6,000,000 over five years to the London Legal Support Trust for running costs and onward grant-making as part of the Advice Skills Development Fund.
19096	Strategic Initiatives	09/03/2022	£50,000 for the year towards the costs of a FTE Billing Co-ordinator and associated running costs as a partnership with LLST and LEF.
15445	Bridging Divides	25/07/2019	£464,000 over three years (£152,000; £154,000; £158,000) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
15328	Strategic Initiatives	25/07/2019	£345,000 over five years (£69,000 per annum) to the London Legal Support Trust to cover the cost of a f/t Development Officer plus senior officer support from the CEO and Head of Funding and associated project costs of establishing, developing and maintain
14136	Investing in Londoners	20/09/2017	£300,000 over two years (2 x £150,000) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
12218	Strategic Initiatives	13/03/2014	£450,000 over three years (3 x £150,000) towards core salary and other costs to support the provision of Centres of Excellence in Greater London.
IPP567	Inflationary Pressures Payment		£1,140



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## Appendix B: Draft Review of the Centres of Excellence scheme; future development of the scheme



FINAL DRAFT -  
Report on the future

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# Report on the future development of the Centres of Excellence Programme

## Introduction

The LLST commissioned Jo Pettitt and Carolina Albuerne as independent consultants to produce an evaluation and review of their Trust's Centres of Excellence Programme in September 2023. In March 2024, the first phase of the work was finalised with the production of an initial report that reviewed the scheme in its current format after interviewing over 45 stakeholders involved in the programme.

Now in July 2024, we would like to present the report on the future of the development of the scheme. We have formulated a number of proposals on how the scheme could operate going forward and responded to the challenges and opportunities emerged from the initial review. We have put together 14 recommendations for the LLST Governance Team to review and develop in order to define the future COEx programme. These would form the base of an implementation plan and, what we expect to be a two to three year 'transition period'.

We have divided this report into five key areas of focus for the LLST Governance Team to work on with said set of recommendations that we hope will make the sign off and formulation of an implementation plan as easy as possible.

## 1. Review of assessment process and eligibility criteria for awarding and removing COEx status

### Current COEx assessment process

We understand from LLST that there has **not been an open call for applications** since the initial one in 2015 that launched the COEx programme. Organisations that have applied to join since then have been put forward for the programme or have approached LLST themselves, having come across the programme in one way or another. As we understand it, there was no systematic approach to these new applicants nor guidance applied to this process. Since the programme was set up assessments have been carried out, in the main, by one independent consultant. These assessments are then reviewed by LLST's grants subcommittee and their recommendations are considered by the Board. Whilst this consultant is highly regarded in LLST and across the sector, there is concern about overreliance on one person to carry out this role, due to sustainability issues and the obvious

lack of diversity this represents. From the analysis of the LLST staff, we found that **in the last five years there have not been many assessments of prospective new grantees** due to the lack of significant growth in the funding pot, the indefinite nature of the programme (no end-point for current COEx grantees), the interruption of the Covid pandemic, and the lack of an open call.

We heard from LLST and the current consultant, who set up and still uses the assessment process, that it is focused on **proxy measures for organisation health** i.e. a desk review of board engagement, board papers, organisation strategy, budget, funding and funding forecast, accounts for last two years and a conversation with the manager. There has never been a focus on the quality of advice given or the client experience and the limited case file review was removed from the process by the previous interim manager at LLST. The consultant accepted their view that his “*gut feel about what the state of the files tells you about whether an organisation is well run is not a robust measure*”, but maintained it is still a useful proxy indicator. The consultant suggested that LLST’s initial concerns about organisations collapsing shortly after receiving funding have diminished over time, and so the original rationale for the focus of the assessment being on organisation health might no longer hold. In this case LLST could shift the emphasis towards, for example, ‘the user experience’.

*“Bob's concern that they were going to fund an organisation that would collapse two weeks later is probably gone; most of the organisations still standing are not going to collapse now, they have survived the last 30-40 years, so maybe we should spend more time in future looking at the user experience.”*

## Concerns about the assessment process

**Key concerns about the current assessment process** raised by our internal and external contributors were as follows:

- **Lack of clarity and transparency about the application process, eligibility criteria, and timeframe**, including a defined endpoint or criteria for potential removal from the programme.
- **Lack of an open field and barriers to entry for applications**, with a perception that most applicants are approached or recommended for the programme, giving rise to concerns over an apparent ‘closed shop arrangement’.
- **Lack of a clear rationale and a structured, objective process** for the assessment and selection of organisations to become COEx, leading to a perception of arbitrariness in the selection process.
- **Too much focus on indicators of organisational health/quality** in the assessment that are covered in existing quality standards (e.g. Lexcel, SQM, AQS), which most COEx already hold, i.e. management and governance processes.
- **Over reliance on individual expertise and on the judgement of a single consultant** for the evaluative process, raising questions about sustainability, lack of diversity, potential bias and subjective elements influencing decisions,

- **Absence of indicators related to EDI and access to justice** in the assessment process, that would reflect a commitment to serving vulnerable populations and improving access to justice, and to inclusion of organisations that are for and led by specific communities that are not currently reflected in the COEx programme.

One contributor outlined what in their view is needed, starting with a clear purpose for the programme and criteria for entry based on the purpose, both of which are visible and transparent (advertised). There should be a clear statement of the limitation of the funds and the fact that not every organisation that is eligible will be able to join the programme and a whole system approach should be adopted, with systematic steps from assessment to decision point, with appropriate decision-making safeguards in place.

*“Assessment and judgement should be structurally enabled; if that's not happening we need to make sure that's an outcome of this review; it's not the way to make judgements around such crucial decisions; [we need] sound and clear criteria, people need to know what the barrier to entry is; a clear and consistent application process; a clear process of review; a diverse panel, including arguable a representative from the sector or user of a service/agency (i.e. external stakeholder lens). Not relying on one person because of their knowledge to make a judgment; there should be a shared ability to make judgements.”*

*“We don't want such a good scheme to suffer reputation damage because the right systems and processes are not in place. We need to make defensible decisions.”*

## Eligibility criteria

The COEx programme **eligibility criteria** are set out on the [LLST's website](#) and in the publicly available document, “LLST Centres of Excellence Scheme, [Information about the scheme](#)” (January 2018).

*To be eligible for the COEx scheme an organisation must:*

- *Have been providing free specialist civil legal casework for at least one year (advice and/or representation in courts or tribunals) and*
- *Casework has to have been provided by at least 2 F.T.E employed staff and*
- *That service must be based in and provided wholly or mostly to residents of London and the Home Counties. If a service is National, it may still be eligible to take part in the scheme but the amount of funding is likely to be proportional.*

*Due to LLST's limited resources, agencies providing only debt and/or welfare benefits must take cases to the Court of Appeal or above. This is purely due to the number of these organisations that exist and the limited funds we have available. We will review this over time.*

LLST staff described the focus of the COEx programme on **specialist legal advice providers** as intentional and rooted in the urgent need to make sure these services survived following the removal of most legal aid funding. They explained that the narrow eligibility criteria, as well as the lack of a public call, are designed to delimit the volume of applicants

and avoid wasting the time of organisations that might apply to join without a realistic prospect of success. They said that LLST intends to retain this focus on specialist legal advice providers in the COEx programme, whilst recognising that the eligibility criteria represent a barrier to entry for some community based organisations. They argued that infrastructure support is available to such organisations from membership organisations including Advice UK and Inclusion London, whereas specialist legal advice services don't generally have access to infrastructure support (with notable exceptions being law centres and CABs). They said that LLST intends to support community based organisations to gain more specialisms through the workforce development programme.

However, a range of different perspectives on this issue were expressed by LLST Trustees and our external contributors. Their views are summarised as follows:

- **Too many organisations are excluded** from the COEx programme by the eligibility criteria, which needs to be addressed in the interests of equity and in light of the 'paradigm shift' in relation to how advice services are delivered and how the needs of particular communities are met (i.e. through community based, user led, holistic services).

*"The eligibility criteria were set up by the original board, mostly people from city law firms, they didn't want to go too far away from where they have connections; they want to maintain focus on the specialist legal advice sector."*

*"Access has been about which organisation knows about COEx."*

- **Specific eligibility criteria need to be reviewed in relation to potential discriminatory impact** and to ensure they are fit for purpose and congruent with the values and intentions that underlie the programme. For example the requirement for 2 F.T.E. employed staff delivering casework may be discriminatory in effect.

*"We should be careful not to create discrimination by design; we should check that the criteria are not incongruent with the values behind the scheme."*

*"The world has shifted, we need to reflect on whether these criteria are still relevant."*

- **The programme needs to move beyond being a closed and 'exclusive' group** and be more openly available to advice organisations across London, in accordance with the aims of the programme. If one intention is to **improve access to justice**, this needs to be reflected in the eligibility criteria and support infrastructure provided to organisations to help them deliver this.
- **If the intention is to continue to support specialist legal advice providers** through this programme, LLST could require organisations to have one of the **existing quality standards** as an eligibility criteria, to avoid duplication of effort and to ensure consistency and transparency.

*"The best approach for LLST is to require agencies either to have Lexel or SQM and 'piggy back' on that, 'it does most of the work for you'."*

- **The terms ‘specialist’ and ‘legal advice’ used in the eligibility criteria are not defined and are potentially problematic.** Distinctions between generalist/specialist advice and legal advice/non-legal advice are not always easily made and don’t necessarily reflect current realities within the advice sector. If the programme is to be linked to specialism, that needs to be clearly defined (i.e. area of law or category of work or provider) and the associated qualifications or quality standards should be included in the eligibility criteria, which they are not at present.

As noted in part 1 of the programme review, **specialist advice work can be defined in a variety of ways** including:

- Specialist because it is focused on a **specific group** (such as migrants, survivors of trafficking, homeless people, parents and carers, disabled people) or **area of law** (such as housing, welfare benefits, immigration, education, family law, public law).
- Specialist because of the **level and type of work** (including representation in the Family Court, County Court, Upper Tribunal, or Court of Appeal), and **who it is delivered by** (e.g. solicitors).
- Specialist because it is **‘end to end’ casework**, from triage and initial advice, through to representation and completion of a case.

*“A lot of generalist and specialist work is closer together than people think and often generalist advisors are just as expert as specialists; often they are paid less to do more; they have higher targets and cover all areas of advice...”*

*“Sometimes we think about the area of law as being specialist and others as serving particular communities and needs.”*

## Focus of the assessment

At the inception of the COEx programme, the overriding concern of its founders was for the survival of the specialist legal advice sector and key service providers and the programme was shaped towards that end, with the assessment providing some assurance that the grantees were financially and operationally viable. As noted above, and according to the consultant who set it up, the assessment was focused on basic indicators of organisational health through scrutiny of management and governance practices, including Board engagement, Board papers, organisation strategy, budget, funding and funding forecast and accounts. The consultants who carry out the assessments (mostly the one consultant who set it up) are recognised for their high level of expertise and knowledge of the sector and over time the process has become more reliant on their individual judgement than on formal assessment against a set of objective criteria.

LLST staff said that the assessment process is designed to be a useful opportunity for self-assessment and reflection, as well as a strategic opportunity for organisations to take advantage of some expert consultancy provided as part of the assessment process. Some of

the feedback from our COEx contributors confirmed that this is indeed how they saw it. They were generally happy that the process was not too onerous and did not require information that was not already available for reporting to other funders, to their Board or for accreditation purposes.

However, a number of observations about the assessment were made by internal and external contributors, including the following:

- **The lack of a standardised process** based on objective criteria and overreliance on individual judgement raises concerns about equity, fairness and consistency of outcome if different consultants are taken on to carry out the assessments.
- Basic indicators of sound financial management and governance are bottom line requirements for any funder, but **the assessment process duplicates existing accreditation processes** that most COEX organisations and specialist legal advice providers have already engaged with and may not add value or help to decide which organisations should join the programme.
- The assessment process should be **aligned with the priorities and aims of the programme** and, depending on the outcome of the review, could include factors such as **EDI, user experience, engagement with communities, organisational impact and quality of partnerships**.
- **If the programme seeks to develop organisations**, rather than find organisations that are already highly developed, the assessment could focus on identifying organisations that have a **vision for where they need to be and what they need to get there**.

*“It goes back to what is the purpose of the scheme; is it that the centres are excellently run or is it that they provide excellent service or are excellent in terms of partnerships across their local ecosystem? Where is the excellence that we're looking for? If we decide that it's something other than that they are excellently run - if we say what we're really concerned about is community engagement, client journey, client service, and quality of partnerships - then do we throw everybody out and start again with new criteria or say were shifting emphasis and will evaluate all existing grantees to assess against those criteria? And the evaluation of those things will drive the funder + support i.e. for the next 3 years. Anyone coming in afterwards has to be evaluated against the new criteria, 'so you're safe but we now want to spend some time working with you on these other things'.”*

*“If an access to justice focus is adopted, that changes the assessment focus. None of these things are currently measured - assessment is currently based on a 'semi sane fundraising strategy and a balanced budget'.”*

*“If the COEX scheme is about giving organisations security in the sector and access to other funding opportunities, we should at least be asking them to explain how they are improving access to justice; it should be an important feature of the assessment.”*

## Fairness, equity and inclusion

Internal and external contributors raised some significant concerns in relation to fairness, equity and inclusion, which have been described above and can be summarised as follows:

- **Lack of clarity and transparency** about access to the programme, eligibility, and evaluative and decision-making processes may lead to lack of equity and inclusion.
- **Lack of open calls** or promotion of the programme to encourage applications, and very few new entrants over ten years, gives rise to the perception of a 'closed shop' and exclusivity.
- **Lack of robust, objective and structured assessment** and decision-making processes, with overreliance on a single expert consultant, give rise to questions of fairness and equitable access.
- **Eligibility criteria that exclude** many community based and user led advice providers and those with part-time workers, give rise to concerns about equity and inclusion in terms of access to resources and potential charges of discrimination.

## Use of a probation period

A 'probation period' was built into the original programme structure to enable organisations that did not quite meet the eligibility criteria in terms of management and governance processes, to work on their shortcomings, achieve satisfactory progress and thereby receive the COEx title and join the programme. LLST told us that in the past there had been some engagement between organisations and the consultant, who provided tailored support to help them reach the required standards and reduce administrative burdens of having to go through the assessment process again. However, in recent times there have not been sufficient resources to invest in this type of support to organisations that are not deemed eligible. One contributor suggested that a process of peer support could be used instead of a consultant, to encourage 'strong' organisations to help others to meet the required standards.

## Ending of support

The COEx programme was not designed with a defined and delimited funding cycle or end point and the fact that entry to the programme brings the designation 'Centre of Excellence' makes it very hard to remove organisations from the programme as this will seem to remove the associated 'excellence' title. The assumption has been that current Centres of Excellence will continue to be part of the programme, unless they fall below the required standards, and that new organisations will be brought in as funding allows. In reality, as far as current LLST staff are aware, no COEx grantees have been removed from the programme although it was acknowledged that some may not meet the expected management and governance standards or recognisable 'excellence' standards.

The ongoing and indefinite nature of the programme and associated funding was one of the features that current COEx grantees highlighted as distinctive and much appreciated, and

some contributors expressed concern that changing this could damage the relationship of trust currently enjoyed between LLST and COEx grantees. However, the tension between prioritising stability for the existing group of grantees and promoting equity, diversity and inclusion by opening up opportunities for new organisations to join the programme was also highlighted by contributors. There was a recognition that a process of ending support or ‘deboarding’ needs to be introduced, including because if the programme review leads to a revision of the aims and eligibility criteria for the programme, it is likely that a transition process will be required that will lead to the ending of support for some current grantees.

Contributors made the following suggestions in relation to a process for ending support:

- **Cap support and membership of the programme** to 7-10 years in line with some other long term funders.
- **Taper support**; for example, provide full support for 5 years, and then gradually reduce support over 7-10 years, allowing organisations to remain designated COEx and access training and infrastructure support during this period.
- **Introduce any changes gradually** to allow organisations to adjust.
- **Focus on planning for endings** and consider options like mergers and partnership work.

## Proposals for revised process

Our evaluation brief was to review the COEx programme and propose changes going forward related to the programme structure, running, future development and sustainability. Within this section, which reviews the assessment process, eligibility criteria and the process for awarding and ending support, we would like to propose a ‘What, why, how’ approach to outline the way the programme works both internally and externally. This approach, when all its details are agreed, should allow for stronger communication about the programme, its intentions and long term strategy, and hopefully culminate in greater learning about its impact. Creating clear messaging about what the COEX programme is and aims to be will make it more identifiable and enable its achievements and learning to be more systematically analysed and learned from.

### The ‘Why’

What is the problem/issue we are trying to resolve? It is clear from the mission of the LLST, and its priorities listed below, that the Trust seeks to promote and support access to justice through provision of free specialist legal services for those who need them but can’t afford them. We understand that the Trust tackles this in a range of ways, and this ambition remains the one that sits behind the COEx programme, ie, it is the ‘why’ and the reason for its existence.



## The ‘How’

Working from the ‘why’, set out in the LLST strategy and mission, we outline the ways in which the problem is tackled. We define the purpose, the aims and the scope/eligibility of the programme below as we see them going forward.

### Programme Purpose

The review process gave us some understanding, from the point of view of the interviewees, of the purpose of the COEx programme. However, a number of people we spoke to were not able to give a clear answer to this question, including COEx grantees. We would therefore suggest that it is a priority to define and communicate a clear definition of the programme’s purpose as part of a ‘relaunch’, so as to manage expectations of current and prospective grantees, current and potential stakeholders and partners, funders and the wider advice sector in London and the South East. This will be key to building on the success of the current scheme and strengthening its future potential.

The London Legal Support Trust within its latest [Impact Report \(2022\)](#) speaks of “Ensuring Access to Justice for All” and sets its three priorities as follows:

1. Priority One: Build excellence through advocacy, knowledge sharing and peer support.
2. Priority Two: Enhance grant-making, practical support and policy work with the advice sector.
3. Priority Three: Diversify and increase income streams through collaboration.

Within these three priorities clearly lies the work to date of the COEx programme, which in its almost 10 years of life has worked with over 40 organisations. Besides the annual reports on the scheme based on the annual questionnaires filled in by the members, the Trust put together a [document in 2018](#) to collate all the information to date relevant to the scheme. This document explains what the scheme does in providing support and services beyond the grant money to its COEx members, but it does not give a clear ‘purpose’ for the programme.

**Recommendation 1:** Our first recommendation is that a **purpose statement** is put together for the scheme that can be agreed upon by LLST and its governance structure, with a desirable final agreement from its current COEx members, or a sample/selection of them (Advisory Panel option that is discussed later in Section 5 of the report).

We propose the following possible **purpose statements** for the scheme:

**Option 1:** The purpose of the London Legal Support Trust Centres of Excellence Scheme is to improve the quality and sustainability of legal support services in London and the South East by setting high standards, promoting equity, diversity, and inclusion (EDI), providing tailored guidance and support, and recognising outstanding organisations, to ensure fair access to justice for everyone.

**Option 2:** The purpose of the London Legal Support Trust Centres of Excellence Scheme is to support the strengthening of legal support services in London and the South East to ensure access to justice for those in need, while championing high quality, user led, inclusive and accessible services.

**Option 3:** The purpose of the Centres of Excellence *Funding* Programme at the London Legal Support Trust is to support the development and sustainability of high quality legal advice services in London and the South East. It provides an ecosystem of support, learning, inclusion and strives towards user led and accessible services that seek to ensure early access to justice.

## Programme Aims

Alongside the potential purpose statement suggested above, we would like to reinforce the understanding of the programme by establishing **a set of aims** and we propose the following, based on our consultations:

- **Elevate Standards:** Provide support to high quality specialist legal advice services, ensuring that organisations consistently deliver accessible and *client-centred*\* assistance.
- **Strengthen Capacity:** Provide resources, training, and development opportunities that enable legal advice organisation to enhance their operational efficiency and resilience.
- **Encourage Adaptability:** Foster a culture of continuous improvement and adaptability, encouraging organisations to adopt a trial and error approach and creative solutions in their service delivery.
- **Promote Collaboration:** Build a network of legal support providers, facilitating the sharing of knowledge, expertise, and resources to collectively address the evolving needs of vulnerable populations.
- **Recognise Achievement:** Publicly acknowledge and celebrate the dedication and achievements of organisations that demonstrate an exceptional commitment to provision of legal support, and that communicate and share learning that inspires others in the sector to strive for more accessible and better quality services.

\***client centred:** By this we mean that services are either co-designed with users and/or informed by users views and feedback throughout their creation and implementation. This can be done with formal 'client advisory panels' or using MEL that is centred in the user/client experience.

**These aims would form the basis of a 'kitemark' for the programme**, recognising that organisations affiliated to the programme have undergone a review of their services by an independent advisory panel that demonstrates a fit with strategy and mission of LLST and EDI criteria. This would not equate to a 'quality mark' as it was clear from our research that neither the COEx members nor the LLST were in favour of duplicating the work of existing regulators and/or existing quality marks. The kitemark would be an alternative way of recognising the organisations in the COEx programme, the impact of their work and best practice within the specialist legal advice community in London and the South East without duplicating what is already in place for regulatory or quality assessment purposes.

This kitemark would be more of a 'seal of approval' from a trusted, collaborative and sector leading organisation such as LLST, that organisations could show to their clients, colleagues, stakeholders, and funders.

We anticipate that one challenge would be the question of if and how to manage removal of the kitemark from those organisations no longer formally taking part in the scheme and/or those that are being 'phased out' or 'decelerated'. We will discuss this below. One option would be to allow organisations to continue to 'display' the kitemark when they are no longer in the programme as an 'alumni', as long as they continue to meet the programme aims.

**Recommendation 2:** Our second recommendation is that the LLST staff and governance body decide as early as possible whether to adopt a kitemark associated with the programme to replace the current 'Centres of Excellence' designation.

## The 'What'

The 'What' refers to what the programme does in order to meet its mission within the wider portfolio of LLST's work. It covers eligibility for the programme and how this is assessed; the work 'in practice'; and how the support and funding is awarded, retained and 'decelerated' and ultimately finalised. In order to continuously analyse if this is a functioning model that works for both the Trust and its COEx members, monitoring, evaluation and learning as well as sustainability and funding are covered in the next sections of this proposal.

## What does the COEx programme do

Based on our review process we propose the following description of what the COEx programme does:

Through the following interventions the LLST Centres of Excellence programme aspires to contribute to a more just and equitable society, where access to high-quality legal support is available to all, particularly the most disadvantaged in our communities.

1. **Structured Support for Specialist Legal Advice Services:** providing structured support to robust, specialist legal advice services across London and the South East, to enhance service delivery.
2. **Financial and Non-Financial Support:** offering financial assistance and non-financial support such as consultancy and training, helping organisations bridge funding gaps and improve operational capacity.
3. **Operational Focus:** helping specialist legal advice services to streamline operational focus, allowing them to prioritise service delivery by promoting efficiency and cost saving schemes.
4. **Responsive Problem-Solving:** providing a prompt response to organisational challenges by proposing tailored solutions and ensuring effective support tailored to the sector's evolving needs.

5. **Supporting Collaboration:** fostering collaboration, partnership and peer support within the legal advice sector, to facilitate knowledge sharing and resource utilisation for enhanced service delivery and staff support, and to promote sustainability and avoid duplication of effort.
6. **Demonstrating Quality and Specialist Work:** showcasing the sector's high-quality, specialist services to funders, enhancing credibility and sustainability through its annual monitoring and evaluation programme .

## Eligibility

The COEx programme's current **eligibility criteria** are set out on the [LLST's website](#) and in the publicly available document, "LLST Centres of Excellence Scheme, [Information about the scheme](#)" (January 2018).

*To be eligible for the COEx scheme an organisation must:*

- *Have been providing free specialist civil legal casework for at least one year (advice and/or representation in courts or tribunals) and*
- *Casework has to have been provided by at least 2 F.T.E employed staff and*
- *That service must be based in and provided wholly or mostly to residents of London and the Home Counties. If a service is National, it may still be eligible to take part in the scheme but the amount of funding is likely to be proportional.*

*Due to LLST's limited resources, agencies providing only debt and/or welfare benefits must take cases to the Court of Appeal or above. This is purely due to the number of these organisations that exist and the limited funds we have available. We will review this over time.*

These eligibility criteria refer to the limited resources of LLST as a limiting factor and rationale for narrowing the criteria to exclude certain categories of legal advice provider and include others. There is currently no rationale that relates the eligibility criteria to LLST's strategy or the programme aims or to the context and reality of how legal advice services are delivered in London. We therefore propose that LLST updates its eligibility criteria to bring them more explicitly into alignment with the purpose of the programme and with LLST's wider mission of 'ensuring access to justice for all'.

## Definition of 'specialist legal advice service'

A key feature of the current criteria is that they specify provision of 'free specialist civil legal casework' as a qualifying criteria. We understand that LLST does not want to move away from providing support to the community of 'specialist legal advice' providers as they believe that there are other bodies such as ASA and Advice UK amongst others, that can provide infrastructure support to 'generalist' advice providers. We also understand that the LLST plays a key leadership role in the development and running of the Workforce Development

Programme, which is clearly prioritising the growth of advice provision in community organisations that would not usually be considered as specialist advice providers.

However, during our programme review the definition of specialist legal advice providers (who is and who isn't one) proved problematic in discussions with a range of COEx grantees and other sector organisations. Each part of this designation proved to be open to question and interpretation, including what is considered 'specialist' advice and what is considered 'legal' advice and what is considered 'advice' and where the boundaries lie (see page 4 above). We therefore propose that for transparency and clarity the LLST sets out their understanding and definition of a 'specialist legal advice service' and communicates this clearly in their purpose statement and eligibility criteria.

The LLST may wish to seek further guidance on this point from sector colleagues. As noted on page 4, a number of ways of defining what is a specialist service were highlighted in our review and should be considered, including:

- Specialist because it is focused on a **specific group** (such as migrants, survivors of trafficking, homeless people, parents and carers, disabled people) or **area of law** (such as housing, welfare benefits, immigration, education, family law, public law).
- Specialist because of the **level and type of work** (including representation in the Family Court, County Court, Upper Tribunal, or Court of Appeal), and **who it is delivered by** (e.g. solicitors).
- Specialist because it is '**end to end**' **casework**, from triage and initial advice, through to representation and completion of a case.

**Recommendation 3:** Our third recommendation is for LLST to consult (as needed) and agree on the definition of 'specialist legal advice' they wish to use in relation to the COEx programme. This is a key action point before finalising the proposal for this review.

## Proposed 'new' eligibility criteria

Whilst the eligibility criteria certainly need to be clearly related to the purpose and aims of the programme, they can also be used as a tool to ensure maximisation of funds, sustainability for the programme and its grantees and to ensure that there is an element of inclusivity and development within the programme as a whole.

We propose the **following eligibility criteria**, which take into account the findings from our review and subsequent interviews with the LLST team.

- *Organisational income must be within the bracket of £50,000 to £2 million.*
- *Organisations must have a current quality mark (Lexcel, AQS, etc) and/or be registered to deliver specialist advice under another regulator (OISC, Law*

*Society, Bar Standards Board, etc) or be working towards such benchmarks/regulations.*

- *The service(s) must be based in and provide services wholly or mostly to residents of London and the Home Counties. If a service is National, it may still be eligible to take part in the scheme if it has dedicated services for residents in those areas.*

In our discussion of these proposed criteria with LLST staff and trustees, a further proposal emerged, to address a concern about the potential lack of inclusion of a range and diversity of services that might not meet the criteria. The **LLST expressed their commitment to including a 20% quota of organisations that are working towards registration and/or accreditation as stated in the proposed criteria.** This commitment, as proposed by the LLST, would be supported by a buddying up/mentoring system from other organisations. This would be one of the priorities when making decisions during the assessment process that is proposed below.

During the review, one of our interviewees commented that we ought to produce: “*a clear statement of the limitation of the funds and the fact that not every organisation that is eligible will be able to join the programme and a whole system approach should be adopted, with systematic steps from assessment to decision point, with appropriate decision-making safeguards in place*”.

We propose the following statements to address this point:

- *The COEx programme operates within a finite budget, which is entirely contingent upon the fundraising results of the London Legal Support Trust’s (LLST) annual events and other fundraising efforts. Recognising the limitations of their budget, the Trust acknowledges that not all organisations meeting the eligibility criteria will be able to participate in the COEx programme. Therefore, the Trust aims to periodically review the programme’s eligibility criteria and overall impact to maximise the effectiveness of its investment over time.*

*To ensure fairness and transparency, the assessment process for the COEx programme will be rigorous and will involve oversight by independent advisors, as well as by the Trust’s staff and consultants. The goal is to continuously improve the programme, ensuring it meets the needs of the most deserving organisations and maximises the benefit of the funds available.*

- *We encourage all eligible organisations to apply for the COEx programme, understanding that our funding is limited and demand is high. Our commitment is to ensure that the selection process is fair, transparent, and focused on achieving the greatest possible impact. While we strive to support as many worthy organisations as possible, the finite nature of our budget means that not all qualified applicants will receive funding. We remain dedicated to reviewing and refining our criteria and processes regularly to optimise the distribution of our resources. We appreciate your understanding and encourage you to stay engaged with our ongoing efforts to support legal aid services through our various fundraising initiatives.*

We also propose inclusion of a statement on **‘exclusions’ from funding** that would cover both legal grounds according to the Charity Commission regulations - see Legal Education Foundation’s page [here](#) on ‘Eligibility and Exclusions’ as an example - and any other potential ‘red lines’ that the LLST might have in relation to the scheme. This could also be a way of ‘ruling out potential applicants’ from applying (see section at the end on a minimum number of trustees, or an exclusion on certain areas of law and/or type or level of advice).

And example could be these, adopted from the LEF’s ones:

## Exclusions

*We will not fund:*

- *Work that does not advance LLST’s charitable purposes or strategic objectives.*
- *Work that falls outside the Charity Commission guidance on campaigning and political activity.*
- *Work that has already taken place.*
- *Work that does not have a direct benefit in the UK.*
- *Projects related to commercial law.*
- *Work on environmental or criminal law except where this is alongside other areas of civil law.*
- *Awards, prizes or one-off events that are not part of a broader programme the Foundation is supporting.*
- *Projects where LLST funding would directly replace or subsidise government, legal profession or university funding, including the costs of law clinics.*
- *Infrastructure for pro bono legal advice.*
- *Capital expenditure on buildings and vehicles.*
- *General fundraising appeals.*

*We are unlikely to fund:*

- *Organisations with fewer than three Trustees, company directors or partners.*
- *Organisations with more general reserves than stipulated in their reserves policy.*
- *Organisations that are in serious financial deficit.*

**Recommendation Four:** Our fourth recommendation is that the LLST and its governance team make a decision on the **new eligibility and exclusion criteria**, and accompanying statement. We hope that our recommendations can support such a decision.

## Assessment Process

As referred to above, the existing assessment process was developed mainly by one consultant, following the request from LLST to focus on sustainability and governance. As explained by Matt Howgate himself: “(...) the *original rationale for the focus of the assessment being on organisation health might no longer hold. In this case LLST could shift the emphasis towards, for example, ‘the user experience’.*”

Based on our research we would like to propose the following options for an assessment process that aims to be transparent, inclusive and accessible for organisations operating in such a time-pressured environment. We hope to have addressed some of the concerns mentioned in the summary above (page 5) in these proposals.

### Proposal A - annual/biannual open process:

- Step 1: set callout/application time frames - suggestion is once a year maximum
- Step 2: organisations take an eligibility test online (this can be done through a simple embedded form within the website).
- Step 3: LLST staff assess those who pass the test and invite them to a 'get to know you interview' (decision making indicators to be formalised).
- Step 4: LLST staff present the organisation to the 'grant committee' (which should include the advisory grant making committee) who will then decide who is invited to apply for the grant (introductory or 'get to know you' interview guidance to be formalised).
- Step 5: LLST asks for a two page proposal addressing how core funding would be beneficial and impactful for this organisation.
- Step 6: LLST 'grant committee' decides which organisations to invite for a final interview (assessment process guidelines to be formalised).
- Step 7: LLST 'grant committee' carries out an 'in person' assessment meeting (preferably) that should follow the assessment process guidelines with an opportunity to talk to senior staff, delivery staff and, if possible, service users.
- Step 8: LLST 'grant committee' makes final decision on which organisations to fund . (final decision making guidelines to be formalised)
- Step 9: LLST 'grant committee' reviews, as per the proposed schedules below, the rotation and deceleration of COEx status to keep the funding flowing for new organisations to enter the programme.
- Step 10: LLST communicates to all applicants the result and initiates an 'onboarding' process for grantees who will also buddy up with existing COEx members.

### Proposal B - annual/biannual 'by invitation online' process:

- Step 1: COEx manager (and/or other leading staff responsible for the programme) alongside LLST colleagues will carry out ongoing scoping of the specialist legal advice landscape as they carry out their functions on the programme and within the different stakeholder and funder groups. This will mean keeping tabs and having 'get to know you' conversations with organisations to understand who might be a good fit for the programme.
- Step 2: COEx manager and grant committee have an 'intelligence download session' to decide, based on the interviews and data collected, which organisations are to be invited to the screening 'get to know you' formal conversation as per Step 3 above.
- Step 3 to follow the process as from Step 4 above.

### Proposal C - annual/biannual 'ongoing' hybrid process:

This would allow for Steps 1 to 3 of Proposals A & B above to be two options for the Trust and the programme on an annual or biannual basis. This would mean that whilst the



programme could run an annual open round based solely on the eligibility criteria, it could also approach organisations during the year to 'invite' them to apply. Steps 4-10 from the first option would be followed as above. This option would give the programme the freedom to look for talent and/or need to meet its mission of supporting access to those more in need.

**Recommendation five:** Our fifth recommendation is for the LLST governance committee to decide on their preferred option (A, B or C) for the assessment and grant round process.

## Prioritisation of applicants

From our discussions with the LLST staff team and considering the analysis presented in our review, we propose that the LLST develops a rationale for prioritising between the organisations that apply to join the programme. This would constitute good practice and would provide clarity and transparency to applicants that might meet the eligibility criteria but whose work might not be prioritised by the Trust, and consistency in decision-making.

Priorities could include:

1. **Geographical location and outreach of organisations**, to ensure service coverage and access across the 33 London Boroughs and wider areas of the South East.
2. **Service provision in specific areas of law**, which the Trust may identify as being under serviced at any given time.
3. **Representation of certain communities and/or underrepresented specialisms** that could be intersectional such as homelessness and migration, debt and substance misuse, LGBTQI and discrimination.
4. **Supporting development** of organisations that are **on a journey towards accreditation and/or registering to give specialist legal advice** (potentially 20% of grantees).

## Awarding and Ending of Support

There is currently no process for ending support for organisations that are part of the COEx programme. Given the limited pot of funding, this does not allow for the membership to expand and limits the impact and reach of the programme, particularly in underserved communities and services. We therefore propose a tapered approach that includes a time limit attached to each grant in order to make the programme more sustainable and far reaching.

The proposal is that grants are offered at the following suggested rates and time periods:

1. **Initial Grant** - 5 years - £20,000 and full access to the COEx programme (consultancy, training and opportunities for leveraging funding)
2. **Deceleration Grant** - 3 years - £15,000/£10,000/£5,000 tapered over 3 years with access to the full COEx programme (consultancy, training and opportunities for leveraging funding)
3. **Alumni Status** - open ended - access to training support, opportunities for leveraging funding and offer of remunerated activities such as: mentoring,

supervision, training delivery and other types of consultancy/support to COEx members.

The deceleration phase could also be split into two if there is an appetite from the LLST to market the programme to cover organisational support for a decade. This would be at the discretion of the LLST.

**Recommendation Six:** Our sixth recommendation is for the LLST governance team to decide on whether the **proposal for awarding and ending of support**, or a variation, fits within its aspirations for the programme.

## Renewal of support during the Initial and Deceleration Periods

Due to funding limitations and potential fluctuation of LLST's funding from year to year as it mostly relies on its own fundraising efforts, a proposal for a renewal process to be put into place as a safeguarding measure was discussed. Given that organisations take part in annual surveys, development support and forum meetings, and potentially some of the new suggested measures for MEL, we would not anticipate a review process to be an onerous. Here we highlight the importance of a deceleration process in which less pressure is put on organisations and more opportunities are developed to support them towards being more sustainable and resilient.

We suggest that the renewal process is carried out:

- **every two years** to ensure all grantees have an assurance of continuity even though there is an overall commitment to decade long funding and/or support. This will also remind grantees that all funding is subject to the fundraising efforts of the Trust.
- via a '**renewal assessment interview**' that requires less effort than the application process and where the LLST assessor(s) record notes and write the report and support organisations throughout the process. The renewal 'application' is submitted to to the grant assessment committee based on the interview.

## Ending of support for current COEx grantees as part of the proposed 'transition period'

As acknowledged on page 7 above (Ending of Support), ending support for existing grantees is a delicate issue that will require a transition period and a separate piece of focused work. We will give some orientation for this process in the fifth section of this report, 'Fundraising and Sustainability' (page 35).

## Ending or suspension of support to organisations whilst in receipt of a COEx grant: present and future

Our understanding is that there has been one instance in the history of the programme where an organisation was suspended for a period of time and later readmitted following an evaluation process. While we have not had access to information relating to this decision

and the process used, we do believe that there may be instances where this might occur in the future, requiring LLST to follow due diligence.

We therefore make the following proposals in relation to possible scenarios where a grant may be suspended and/or ended. All of these should be clearly set out in the grant agreement and presented to the grantee at the time of awarding the grant. [Here](#) is the general advice issued by the NCVO on Safeguarding for Grantholders for reference.

We see the following scenarios as warranting the suspension and/or ending of a grant, as long as the appropriate guidance and decision making processes have taken place:

- Inappropriate use of funds that is outside the established agreement with the LLST and the Charity Commission regulations.
- A safeguarding issue that isn't appropriately addressed and/or amounts to harm and subsequently carries a potential reputational risk.
- Removal or suspension of a quality mark certificate and/or other accreditation.
- Significant risk issues relating to governance, quality of advice, understaffing and/or a rise in complaints from service-users that arise from an LLST review process or peer review.

## Re-application process

The evaluation team considers that if the Alumni programme is sufficiently developed and invested in, there could be a cut off point where organisations cannot access the full COEx/Initial grant for the following 10 years, unless there are significant changes in the organisation or the context in which the specialist legal advice sector operates. This would be in line with many other long-term funders, which have ongoing relationships with organisations after their funding has ended, such as Esmee Fairbairn, Sigrid Rausing or the Oak Foundation. This is of course a decision to be made by the LLST Governance team as per our recommendations for action/decision making below.

**Recommendation Seven:** In our seventh recommendation, we propose that the LLST governance team makes a decision on proposals put forward on renewal, ending or suspension of funding for current and future grantees as well as the time they would want an organisation to wait before re-applying once they enter the Alumni part of the programme.

## 2. Review of COEx monitoring and evaluation process

### Current COEx monitoring and evaluation process

#### Annual self-assessment questionnaire

The self-assessment process is described in LLST's document, [Information about the Scheme](#) (January 2018) as follows:

*Each agency carries out a self-assessment against a range of good practice indicators:*

- *management and governance;*
- *risk, business planning and strategy;*
- *financial management;*
- *quality and compliance.*

*Agencies reflect on their annual progress in each area and identify issues which need further development, supported through LLST where possible. These are assessed by a sector specialist, who writes a report identifying strengths and areas for development. LLST provides and/or brokers funding and other forms of support to enable the agency to reach or maintain COEx Status.*

*[...]*

*The primary purpose of the COEx scheme is to assist the individual agency to identify where there may be threats to its sustainability and to make suggestions as to how it can mitigate those threats.*

*The second purpose is to provide some level of assurance to LLST as a funder (and perhaps other funders). Some agencies are in financial difficulties and require both emergency and ongoing grant funding to help them to survive. LLST's grant funding available is limited and it is important that the trustees have confidence that they are not investing in agencies which are unlikely to survive for long or which are not capable of addressing their problems.*

We heard from [LLST](#) contributors that the annual self-assessment questionnaire is crucial for understanding the COEx **programme delivery and overall impact**, including numbers of clients reached, areas of advice given and for obtaining other information about what COEx grantees are doing. This is helpful in order to target particular programme workstreams effectively. Beyond this, it is used to help **identify risk** in terms of governance and sustainability of services, and the **support needs** of participating organisations. The assessment helps to identify organisations that would benefit from a check-in visit from the consultant or proactive offer of support, for example if there has been a recent change of senior management, loss of more than 30% of the Board of Trustees, or a high rate of staff turnover. The financial information gathered may help to **identify financial risk** for individual organisations prompting targeted intervention, but also **builds a picture of the financial resilience of the sector**, which is useful for programme development to share with key

stakeholders and funders. For example it is good to know the range of organisations operating in the sector in terms of size and budget and how many operate at or below their reserves policy over a sustained period.

The intention is that the questionnaire provides **valuable baseline data** about the specialist legal advice sector and some indicators of the impact of the COEx programme, but LLST hopes that it is not too burdensome and that it is a **useful tool for organisations as a form of self- assessment**. Concerns were expressed about the overall length of the questionnaire, whether there are any redundant questions, and its relevance and usefulness to COEx grantees. They would be interested to explore other ways of obtaining qualitative feedback from COEx grantees, including for example periodic calls.

COEx grantees were **generally happy** with the self-assessment questionnaire. They spoke positively about the **process** (timely information and flexibility with the deadline) and found the **structure** of the questionnaire helpful, enabling them to assign different sections to staff members or teams. Although the questionnaire is long, **most found the length justifiable** as long as the information is useful and they receive feedback, and it is shared with the sector and funders, ideally to attract more funding. They said that completing the questionnaire gave them the **opportunity to reflect** on their work and their service; to think about successes, things that have changed or progressed, and to identify areas of risk. Some said that they are able to **reuse information** to complete the questionnaire or having completed it, for example for annual reviews, accreditation assessment, funding bids, or audits. One person suggested adding questions related to quality.

*Very happy with the monitoring as it can be split between areas and the work can be spread across the team. They are always very flexible in accepting it if you are a little late. It's a good opportunity for me as I use it to recap on how the year has been as I don't get an opportunity to do it otherwise. The five key questions of risk are the ones that always make me think.*

*The annual report makes sure that our services are remaining on track and gives us an opportunity to reflect back on our work on what has gone well and what has changed. We report on our London services to compare and contrast how our work within London has shifted and what we have done to meet demand. It is a period of reflection, to know how our work has progressed in London. It's broad and I think that it will help organisations within London.*

*We do our own annual evaluation and reporting back to the Charity Commission. It's part of our everyday work to do this, and we don't mind getting some data from our own internal systems and providing this to some funders to justify their grants/investment and/or for planning for the future*

*As a process it's fine, we are told when it's coming, we are given a deadline, a survey monkey link. We get to choose our own reporting period which is fantastic, not all funders allow us to do this. Our process runs from Jan-Dec so this is really helpful. It's split into operations/governance so I think it's fine from memory. Our casework team provides monthly stats and quarterly we review our figures and look at our insights, and then we do year to*

*year comparisons. Data is there for us to understand what our services are doing, how does this help us put together our work, we are being more strategic with the use of our data.*

*It's fit for purpose and not too difficult and I can understand why they might want the information but perhaps it could be adapted to include more quality questions. In terms of usefulness, I don't think it's useful as a self assessment. It's not something that I get out when I do my business planning*

Current consultants emphasised that the review process should be **proportionate** to the size of grant and capacity of organisations, and **aligned with the aims** of the programme and its theory of change (i.e. what is the change LLST is trying to create with the COEx programme). For example, the current questionnaire does an adequate job of assessing how things are going for COEx grantees, if anything has changed and if there is anything they need. This fits broadly with the current aims of the programme. However, if the programme seeks to drive positive change in the sector going forward, for example in relation to diversity and inclusion, client experience, community engagement and improving access to justice, then the questionnaire needs revision. The current dataset does not deliver information on these issues.

## Use of data collected from the questionnaire

We heard from LLST staff that the questionnaire was designed and developed by 'highly experienced management and leadership consultants'. The data is written up into a report on an annual basis by a different consultant (see for example the [2022 report](#)) and used by staff in two ways:

- i) **aggregated data** from all COEx grantees, both structured and narrative, is shared within the sector and with funders and is used to shape the COEx programme and for strategic planning.
- ii) **individual responses** are reviewed as required to explore needs that can potentially be met by the programme and review risk where issues of concern have been flagged.

The 2022 report was 30 pages long and consisted of a detailed write up of the questionnaire findings, covering:

- **Headline findings**
- **Services provided** (types legal advice and topics provided, delivery method, number of clients by topic, number of cases overall & quality standards held)
- **Covid-19 impact**
- **Cost of living crisis impact** (demand and type of enquiries, staff and volunteers, financial impact on the organisation)
- **Leadership, staffing and governance** (staff and volunteer roles and levels, governance, performance monitoring)
- **Risks, challenges and plans** (risk log, strategic plans, successes and challenges)
- **Finance and funding** (reserves, surplus and deficits, financial planning and management skills, COEx agencies' income)
- **Help and support needs** (training and support, other support)

LLST staff are concerned to ensure that the value they get from the data is **proportionate** to the effort for grantees and the grant size, and would like to differentiate 'nice to have' from 'essential' information. LLST has signed up to **IVAR's 'open and trusting grantmaking' values**. These are:

1. Don't waste time
2. Ask relevant questions
3. Accept risk
4. Act with urgency
5. Be open
6. Enable flexibility
7. Communicate with purpose
8. Be proportionate

The key value for LLST is to **only ask questions if you really need the information and don't ask for anything that you will not use**. For example, the questionnaire includes a question on change in senior management in the previous year because they know it can be a trigger for organisational instability and they want to intervene with an offer of support.

#### Sharing insights and assessing impact

COEx grantees raised the question of **dissemination** of the information and analysis from the annual questionnaire to a wider audience, particularly with a view to diversifying funding for the sector beyond foundations and grant funders. Some reiterated that the annual questionnaire is a **useful reflection point** for them and helps with strategic planning and decision-making about priorities for the coming year. However, they would like **more feedback** from the overall process, a '**state of the sector analysis**'. One organisation reflected that LLST has helped to raise standards in the sector by implementing this review process and that organisations could benefit from further **sharing of the insights and analysis** generated through the questionnaire. Another suggested that an overall **summary of findings** could be put together and an **annual plan** of how LLST will respond, for example to training needs identified. One grantee thought it would be useful to share more about **risks** that organisations are facing to identify common themes and issues that LLST could address.

*LLST has really helped to raise our standards. We see best practice shared and we use it. What's missing for me is the feedback loop as I don't attend the forum meetings which are going to talk about the annual report and its findings. If LLST had a more solid offer on training for the year, I would be able to factor that in more for my own planning.*

LLST Trustees said that they don't currently get much insight from the data collected from annual questionnaires and suggested the information shared with them could be focused on how the grant money has been used, how organisations have improved and how users have benefited. They don't need to see the whole data set but would like to assess 'real change' and 'value for money' and would like to know that the data and insights are being used to **inform decision-making and understand impact**.

With regard to assessing **impact**, one consultant raised a note of caution about the meaningful attribution of the impact of LLST's grant making based on aggregated numbers: organisations that gave advice, people receiving advice and range of advice issues covered. *Data can be a bit meaningless, i.e. if LLST reports that xx agencies gave advice to xx people on xx issues, what does that tell us, when LLST only gave them 10k?*

Funders said that because of their close work with LLST and being embedded in the programme, they are very satisfied with the reporting and feel they have a good understanding of the work. This is in part thanks to the funder's position on the steering committee for the Advice Workforce Development Fund programme.

### Responding to feedback and implementing new initiatives

Some organisations commented positively on **changes and new initiatives** that LLST had implemented as a result of feedback in the questionnaire. Examples included the strategic workforce development programme, wellbeing initiatives and practical initiatives around EDI and access to Language Line. The **risk of duplication** of effort was raised by one organisation, with LLST, NACAB, Advice UK and LCN all providing a range of support initiatives to their members and affiliates.

One organisation commented that they have proactively contacted LLST if they need help with something rather than wait for the annual questionnaire and have found them to be very responsive 'all year round'.

*If I have a problem I drop them an email rather than putting it in the yearly report and then thinking oh, did they reply to what I raised? I feel like they respond to things all year around, I couldn't be a bigger fan! ... Managers there are greatly patient and very responsive.*

Consultants commented that LLST's approach of encouraging grantees to approach them when they have a problem is highly effective because it means that help and practical support is provided at a point when the organisation is ready to change and develop.

*I like LLST's approach of 'we're here when you need us, if you've got a problem approach us and talk to us and we'll try and find a way of supporting you'; that brings the resource in at the point when the agency is ready to change. Lots of funders throw money at organisations when they are not ready to develop and the money isn't used as effectively as it might be. With LLST because of the great listening and open dialogue, they can say 'ah ok thats your problem at the moment, we'll see what we can do about it' and they go away and find stuff that really helps.*

### Onsite review

The review process is described in LLST's document, [Information about the Scheme](#) (January 2018) as follows:

#### *The Reviewer*

*The reviewer will be an experienced consultant who has worked with advice agencies, businesses and other charities to help them achieve stability.*

*The process is confidential between the reviewer, LLST and the agency. If the*



*reviewer sees individual client information, it will not be passed to LLST and the reviewers will have the same duty of confidentiality as anyone employed by the organisation.*

#### *The Process*

*The process begins with a request for information to be sent to the reviewer in advance of the visit. This will include:*

- A completed pre-review questionnaire;*
- The most up to date Agency accounts*
- The most up to date budget and cash flow forecast*
- The most up to date Business / Strategic Plan*
- An organogram*
- The fundraising strategy*

*The next stage of the process is the on-site review. The reviewer will come to the agency's offices and speak to relevant manager/supervisor (and, where possible, to at least one of the trustees and to such members of the management team as is appropriate – e.g. the finance manager or practice manager).*

*The reviewer will send the agency a draft report. If the agency disagrees with any comments or findings, there will be an opportunity to resolve them before the report is sent to LLST.*

*Where necessary or desirable, LLST may meet the agency to identify extra help that may be needed to assist the agency to improve areas. For instance, where LLST may be able to broker fundraising assistance to help with grant applications.*

*The process is designed to help to get the agency to Centre of Excellence status and to provide funding in a meaningful and sustainable way.*

We heard from LLST and one programme consultant that the onsite review has not been implemented as part of the annual review process for all COEX grantees as originally conceived. Instead the **annual self assessment questionnaire** is used as an opportunity to **flag concerns and risk** arising from the responses of individual organisations. This might relate to financial circumstances or management and governance issues such as a change in senior management, high staff turnover or loss of significant numbers of Board members. A review visit would then be arranged with the consultant. Grantees are evaluated against a range of good practice indicators in relation to: management and governance; risk, business planning and strategy; financial management; and quality and compliance.

The same consultant emphasised that **review visits** carried out by the consultant are **not an evaluative data gathering process**, but are prompted by concerns raised in the questionnaire and the assessment that some **targeted support** might be useful. The consultant expressed the view that LLST does not have a regulatory role in the specialist legal advice sector (which in their view is highly regulated) and while trustees might expect a review process to ensure grant money is spent appropriately and effectively, the process needs to be proportionate to the size of grant. They said that no organisation has been removed from the programme due to concerns about their performance, though some have been assigned an 'amber' status, indicating that more support is needed. The consultant said that they rely significantly on their knowledge of the organisations and experience in the

sector to identify areas of concern and to make 'positive constructive suggestions' on how things could be improved.

We reviewed a range of 'review reports' or 'health checks' shared by LLST, which showed that there is not a standard format that has been used for all the reviews, however the following topics are generally covered:

- *Management*
- *Governance*
- *Strategy & Planning*
- *Finances and Fundraising*
- *Staffing*
- *Recommendations*

Quite a number of reviews conducted in 2021 used a more detailed format set out in a Word table:

#### *Governance*

- *Has there been any significant turnover in Board members and has this affected Governance?*
- *Is current governance robust and sufficient for the agency's needs?*

#### *Management*

- *Has there been (or is there likely to be) any significant change in senior management and how has this affected the agency?*
- *Does the agency have sufficient management resource and, if not, what is needed?*

#### *Staffing*

- *Has the agency lost staff during the pandemic and how has this affected operations / how will it affect operations?*
- *Have recent recruitment processes been successful or are there recruitment concerns?*
- *Are there any other staffing concerns that might affect client service or the operation of the agency?*

#### *Finances*

- *Is the agency facing a deficit or surplus budget in the current financial year? Either way, why?*
- *Is the agency projecting cash-flow difficulties in the current (or next) financial year? If so, what are they and when are they likely to occur?*
- *How is the agency finding fundraising in the current environment?*
- *What are the organisation's reserves and have they grown or reduced during the Covid period?*
- *Are there any particular funding shortfalls or financial issues that are likely to affect the agencies client services or operation?*

#### *Client Services / Operational Issues*

- *How is the agency approaching reopening face to face services and hybrid working and what are the likely risks or issues?*
- *Is the agency seeing increased need / demand for services and what does this look like? How capable is the agency of responding to this increase?*

#### *Strategic Planning*

- *Is the agency able to plan for the coming 12-36 months and, if so, what are its strategic priorities?*

#### *Risk*

- *What are the biggest risks to the agency's work in the short to medium term?*
- *What can we do to help and support?*

#### *Conclusion & Recommendations*

## Ideas for improving the monitoring process

Those we spoke to made some suggestions for improving the process, including implementing:

- a structured review process to proactively identify and address risks, rather than waiting until organisations reach a crisis point
- ongoing monitoring visits to ensure organisations are meeting expectation
- an annual focus group or similar initiative to facilitate ongoing feedback and evaluation of program effectiveness
- a peer review process
- user reviews to strengthen engagement with service users
- training and resources to organisations on how to effectively monitor and report on their activities in a way that is inclusive of individuals with disabilities

## Proposals for revised monitoring, evaluation and learning process

The information we gathered through the first phase of this evaluation has allowed us to put together some proposals based on the findings from our interviews and our own analysis of the COEx programme.

Our interviewees gave us some insight into what they would like to see in a monitoring, evaluation and learning (MEL) approach in the COEx programme, as noted above (page 27). Many of their suggestions require a significant increase in resources, including for commissioning work from external providers/stakeholders for objectivity and external review purposes, but also given the current limited internal resources at LLST to carry out this work in house. Furthermore, some of the suggestions, such as the proposal for peer review, would put an additional burden on COEx members. Whilst remuneration for this work might be an option, it ought to be budgeted and included in a formal MEL programme for the scheme so that grantees are aware and can make themselves available for this work.

### Review the annual self assessment survey

Overall, as stated above (page 20 onwards), the MEL tool currently used by LLST to monitor the programme is well received and accepted by COEx members. However, there is potential for refinement and improvement, perhaps through a co-production process (with those in the scheme being monitored/assessed) as touched upon in the next section. It was also proposed that the survey is less centred on organisational health, especially if the proposed new eligibility criteria are accepted, and is focused more on assessing risks and challenges and service users' experience.

We propose that the opportunity to survey these specialist legal advice agencies once a year gives the LLST the opportunity to **revise and/or make additions to the questionnaire on specific topics that might be helpful for its strategic purposes or to ‘dig deeper’ into an issue that might be coming up for the sector across the year.** This would give the LLST and the wider sector an evidence base to inform decision making and advocacy with stakeholders such as local authorities, the MOJ or other funders (see below reference to Refugee Actions’ Insight Hub on their approach to taking issues of concern and producing data sets to be used for a variety of purposes).

We also would like to propose that the survey aligns with the finalised purpose and aims of the programme once these are signed off, as recommended in the first section of this report. We would be happy to offer an initial thematic review of the survey once these decisions have been made, to give an overview of what the survey might look like going forward, subject to a potential co-production process.

**Recommendation Eight:** Our eighth recommendation is for LLST to decide if they wish to i) revise the self-assessment survey in line with the updated purpose and aims of the programme, ii) add elements to the survey on a yearly basis for strategic use; iii) specify uses of the survey data; and iv) update the survey using a co-production approach with users.

## Introduce additional monitoring tools

**Peer review:** We propose that a potential way of increasing learning and skills sharing across the COEx cohort would be to introduce **‘peer review’ visits.** These could be promoted as an opportunity for learning following a 360 degrees appraisal approach, where individuals within organisations speak and share reflections about each other’s organisation in a reciprocal way, which is then recorded, and where support and/or recommendations are produced by the peer reviewer’. Since this approach is time and resource intensive, we would envisage a small number of such reviews taking place annually, with a focus on a shared review of each others’ service and how the programme is working for each organisation.

**Focus group discussions:** We also propose the use of **‘focus group discussions’** on an annual basis to provide additional monitoring or learning about a particular issue that has arisen from the annual survey or other interaction with programme members. We would be happy to produce a draft generic topic guide for such focus groups if this recommendation is accepted, although this would need to be adapted according to the themes under discussion..

**Recommendation Nine:** Our ninth recommendation is that LLST considers introducing further monitoring tools such as the Peer Review Visits and/or Focus Groups.

## Formalise an MEL structure

We propose that LLST develops an **MEL framework** that is linked to the programme aims and purpose, integrated within the programme structure and processes, and 'informed' by the members. We believe that using a participatory, **co-creation approach** to developing an MEL framework will harness more buy-in to the monitoring process, but will also be an opportunity for learning, skills sharing and development of skills for participating organisations.

We recommend that going forward there is an emphasis on **learning** within the **MEL framework** and that priority is given to the interpretation and dissemination of the findings of the self assessment survey in a way that is most useful for COEx members, the wider legal advice sector and other stakeholders. This could include:

- A **breakdown of the findings by individual organisation** that they could use to report to others and/or use in their own strategic planning or fundraising efforts.
- A **deeper analysis of the data collected**, which explores the primary issues for organisations in that current period. We take note of how [Refugee Action's Insight Hub](#) currently reports its findings from their periodic surveys on particular issues. Recommendations and information notes arising from this could be useful not just for the COEx cohort but for the wider sector to get a bird eye's view on the situation of the specialist legal advice sector in London and the South East.
- A **report and/or commentary based on the priorities that have emerged from the survey** findings and that can be used for specific purposes by the grantees and/or the wider access to justice community. Topics could include, for example, access to funding, gaps in legal advice, workforce training and development and lobbying and campaigning efforts amongst others.
- A **dissemination strategy** of the report(s) for the different audiences: grantees, LLST and partners and the wider public working directly with service users but also around campaigning and advocacy.

**Recommendation Ten:** Our tenth recommendation is for the LLST to i) develop an **MEL framework** through a co-production process and ii) adopt additional 'Learning' measures for improved dissemination and use of findings.

Furthermore, with a clear understanding of the current staff team capacity at LLST to work on this programme, we believe that a strengthened MEL framework can only be developed and delivered if there is a dedicated full time role within the team to work on the scheme (COEx Programme Development Manager or something alike). We believe that this is being

prioritised and welcome the intention to increase the impact of the programme at this stage of revision and renewal.

**Recommendation Eleven:** Our eleventh recommendation is that the LLST prioritises the recruitment of a **Programme Manager** for the scheme who will oversee the development of an MEL strategy.

### 3. Name of the programme

The name of the COEx programme was discussed with interviewees, as set out in the report from phase one of this evaluation. As documented in our report, there was substantial feedback on this topic, especially related to the use of the word 'excellence' and how this was perceived and understood by COEx members and those external to the scheme. We also discussed what the name meant to the participants and how they felt it was perceived within and outside of the scheme during the focus group with COEx grantees. We made the following recommendations based on this input and our own analysis.

#### Recommendations on changing the name of the COEx programme

- **Reevaluate the name:** It is prudent and timely to reevaluate the programme's name, in light of the programme review and the concerns raised about the use of 'Centers of Excellence'. Alternative names might better reflect the program's focus and objectives.
- **Maintain brand recognition:** While considering a name change, efforts should be made to preserve the recognition and branding value associated with COEx. Ideally a name change should enhance clarity without sacrificing the positive impact of the brand on funding and partnerships.
- **Clarify programme's purpose and criteria:** The name should communicate the programme's purpose and clearly align with the assessment criteria for acceptance into the funding programme. This will involve greater transparency and communication regarding the assessment criteria and benchmarks.
- **Provide clarity on quality assurance:** Given the discussion around whether COEx functions as a quality mark or accreditation, it is important to provide clarity on the programme's role in quality assurance. This includes clearly distinguishing COEx from existing quality standards and ensuring transparency in the assessment process.
- **Balance rebranding efforts with resource allocation:** Rebranding efforts should be balanced with other organisational priorities, such as fundraising and programme implementation. Consideration should be given to the resources required for rebranding and the potential impact on funded organisations.

- **Engage stakeholders in decision-making:** Continued stakeholder engagement throughout the process of evaluating and potentially changing the programme's name is important to ensure that decisions align with stakeholders' needs and perspectives.

We stand by these findings and would therefore make the following recommendation:

**Recommendation Twelve:** Our twelfth recommendation is for the LLST to review the name of the programme based on the feedback received and try to find a suitable alternative. We recommend that a brand specialist is engaged in this process as this falls outside our expertise as consultants.

For information only, these are some of the names that came up during our analysis of the feedback from review participants:

Sustain Advice London (SAL)

Sustain Advisory Fund (SAF)

Legal Advice Sustainability Program (LASP)

Sustain Legal Advice Programme (SLAP)

Sustain Legal Advice Centres (SLAC)

## 4. Plan for diversifying pool of assessors and capacity building consultants

For the last 10 years the COEX programme has been mainly supported by a small pool of consultants, with one lead consultant who was involved in the setting up of the scheme. They have worked on various aspects of the scheme, such as the analysis of the annual survey, assessment visits, and the provision of direct consultancy support to COEX members.

Assuming the ongoing provision of direct consultancy support to programme members in areas such as: governance, fundraising, strategy, integration of lived experience, etcetera., the pool of consultants ought to be expanded in the interest of diversity and inclusion. An open call for these consultancy roles could be put in place in order to create a roster that would be diverse, multi disciplinary and cross sectorial. This would ensure that the best capacity development approaches and range of experiences and expertise are made available to programme members, depending on their needs. We recommend the LLoyds Grant Plus support scheme as an example of an open recruitment process.

**Recommendation Twelve:** Our twelfth recommendation is that the LLST governance team expands the pool of consultants working on assessment, MEL and capacity development for the programme through an external open recruitment process and maintains a roster of consultants that is both inclusive and diverse.

## Advisory Panel

We set out our proposals for an Advisory Panel below. This panel could be focused exclusively on the COEx programme or have a wider mandate within LLST. In this case, the panel could provide input to decisions about the strategy and priorities of the Trust.

Our proposals can be discussed by the LLST governance team and tailored to best fit the programme or wider organisational objectives, with consideration for the resources needed to run such a group.

### **Purpose of the panel**

- To offer independent advice and recommendations related to the programme's assessment process.
- To provide input and direct experience of the work of specialist legal advice agencies.
- To bring a diverse and representative pool of people together where the LLST, and other potential consultants, might not have lived experience.
- To act as a standing group that is called upon when there are decisions to be made about the programme, its development or priorities.

### **Composition of the panel**

- Current or former users of specialist legal advice services (services provided by COEx members and/or other organisations within London and the South East). In order to recruit, LLST could look at other London advisory panels such as the one recently created by the GLA, and/or work with existing COEx members to find those who may already have advisory panels of users (Praxis would be one example).
- Staff or volunteers (preferably with lived experience of having accessed specialist legal advice) within the current COEx members who would provide direct experience of the reality of advice delivery.
- Independent community members who have experience and/or understanding of the impact of access to justice for their communities even if they are not in the legal profession (community leaders, healthcare staff, teachers amongst many others).

### **Recruitment and remuneration**

- Recruitment would be dependent on how diverse LLST wants the advisory group to be and/or whether the group is focused on COEx and/or LLST more generally. Some examples are:



- Recruitment via existing COEx members and their advisory panels and/or user led panels.
- Recruitment via direct advertisement of the role within COEx members and the larger stakeholder group of LLST.
- Open public call that is widely advertised.
- Remuneration should be considered. LLST could review the recruitment and remuneration proposals developed by other organisations before deciding on an approach that would be the best fit for example MEX or the GLA. Development and upskilling of an advisory panel like this should be considered, especially if it will include people who will join this type of body for the first time.

#### **Facilitation and development of the panel**

- We caution that additional staff time and resources will be required to support an advisory panel to run in an optimal way. Without this, too much of a burden will fall on existing staff within LLST, or the panel will not receive appropriate support.

**Recommendation Thirteen:** Our thirteenth recommendation is that the LLST governance team introduces an Advisory Panel as proposed, or a variation of it, to ensure it meets its intention to reach those most in need of accessing specialist legal advice. We also recommend that LLST considers whether the remit of an advisory panel might be extended to cover the whole work of the LLST.

## 5. Options for sustainable funding and development

The COEX programme is currently running on an annual budget of £450,000 which is entirely dependent on the LLST's capacity to fundraise on an annual basis through its different fundraising streams. This places the scheme, and its development, under substantial pressure and poses a question in relation to the aspiration to potentially provide tiered financial and organisational support over a 10 year period, as described in our proposals above.

We made the following proposals (above), in relation to this decade long commitment:

**Initial Grant** - 5 years - £20,000 & full access to the COEX programme (consultancy, training & funding leveraging opportunities)

**Deceleration Grants** - 3 years - £15,000/£10,000/£5,000 tapering throughout the 3 years with access to the full COEX programme (consultancy, training & funding leveraging opportunities)

**Alumni Status** - open ended - access to the training support, funding leveraging opportunities and offer of remunerated activities such as: mentoring, supervision, training delivery and other types of consultancy/support to COEX members.

In order for the LLST to fully reopen their grants round, and due to budget restrictions, there will need to be a transition period of deceleration or offboarding of organisations currently supported by the scheme. We estimate that this ‘**transition period**’ will take two to three years to complete. The ‘transition period’ will need to follow a number of steps for its successful implementation.

The steps we propose below will need to be reviewed and signed off by the LLST governance team and followed throughout the implementation of the transition and the revised COEX programme.

1. Analysis to be carried out of current COEX organisations that takes into account the following:
  - number of years in the scheme
  - geographical coverage
  - current financial stability
  - other potential support from infrastructure bodies such as LCN, ASA, or Advice UK
  - areas of law they cover
  
2. Proposal put together to offboard organisations in a tapered way, for example following the guidance below:

Number of years as COEX	Geographical consideration	Financial stability	Offboard when
7 to 10 years	TBD	TBD	2025 - one final grant 2026 - offer to become part of the Alumni programme
5-7 years	TBD	TBD	2025 - one full grant 2026 - one half grant 2027- offer to become part of the Alumni programme
2-5 years	TBD	TBD	2025 & 2026 - full grant 2027 - half grant 2028 - offer to become part of the Alumni programme
2 years or less	TBD	TBD	Consideration for transfer directly onto the proposed new 10 year programme by raising their grant in 2025 to the full 20k value and then following the timetable as per the suggestions in the proposal

Other steps should be followed in relation to the budget and fundraising forecasts that will allow for more accurate planning of the transition period. Calculations should take into account expenditure relating to:

- Grant Plus 1-1 support and forecasts for this over the 3 year period.
- Training and wider development support that would engage the Alumni cohort. This would need further consideration if the intention is to remunerate Alumni organisations for delivering support services such as training, supervision, mentoring and/or 'buddying up'.
- Grant payments during the transition period set against new grant payments at the proposed new rate of £20,000. This will help LLST to decide when it is feasible to open the first 'new round' of funding under the revised scheme.

**Recommendation Fourteen:** Our fourteenth recommendation is that the LLST Governance team reviews and adopts the proposed (or similar) process for a transition period and proceeds with implementation as soon as feasible.

## Conclusion

We have been privileged as reviewers to play a small part in the evaluation and revision of the COEx scheme in its 10 year anniversary. We have been able to see first hand the impressive work carried out by the members of the scheme and how, whilst managing on a shoestring, the LLST have made this their flagship programme, which informs and supports all the work they do towards ensuring access to specialist legal advice in London and the South East.

This second phase of our review has been based on a very productive and collaborative dialogue with LLST staff and trustees and we very much appreciate your support, encouragement and engagement in such a process.

We remain strong advocates for the programme and believe that these recommendations and the ongoing commitment of the Trust will make the programme stronger and solidify its position as a national programme of reference in the struggle to ensure access to justice.

# Summary of Recommendations

## 1. Purpose, eligibility, assessment process, grant making and grant ending

1. **Recommendation One:** Our first recommendation is that a **purpose statement** is put together for the scheme that can be agreed upon by LLST and its governance team, with a desirable final agreement from its current COEx members, or a sample/selection of them (Advisory Panel option that is discussed later in Section 5 of the report). (Page 9 of the report)
2. **Recommendation Two:** Our second recommendation is that the LLST staff and governance team decide as early as possible whether to **adopt a kitemark** associated with the programme to replace the current 'Centres of Excellence' designation. (Page 11 of the report)
3. **Recommendation Three:** Our third recommendation is to explore this together (at LLST) and come to one **definition** of what the LLST means by '**specialist legal advice**' that could include all or some of the above. This is a key action point before finalising the proposal for this review. (Page 13 of the report)
4. **Recommendation Four:** Our fourth recommendation is that the LLST and its governance team make a decision on the new **eligibility and exclusion criteria**, and accompanying statement. We hope that our recommendations can support such a decision. ( Page 15 of the report)
5. **Recommendation Five:** Our fifth recommendation is for the LLST governance team to decide on their preferred option (A, B or C) for the **assessment and grant round process**. (Page 17 of the report)

6. **Recommendation Six:** Our sixth recommendation is for the LLST governance team to decide on whether the **proposal for awarding and ending of support**, or a variation, fits within its aspirations for the programme. (Page 18 of the report)
7. **Recommendation Seven:** Our seventh recommendation is that the LLST governance team makes a decision on proposals put forward on **renewal, ending or suspension of funding for current and future grantees** as well as the time they would want an organisation to wait before re-applying once they enter the Alumni part of the programme. (Page 19 of the report)

## 2. Monitoring, Evaluation and Learning Process

8. **Recommendation Eight:** Our eighth recommendation is for LLST to decide if they wish to i) revise the self-assessment survey in line with the updated purpose and aims of the programme, ii) add elements to the survey on a yearly basis for strategic use; iii) specify uses of the survey data; and iv) update the survey using a co-production approach with users. (Page 28 of the report)
9. **Recommendation Nine:** Our ninth recommendation is that LLST considers introducing further monitoring tools such as the **Peer Review Visits and/or Focus Groups**. (Page 29 of the report)
10. **Recommendation Ten:** Our tenth recommendation is for the LLST to i) develop an **MEL framework** through a co-production process and ii) adopt additional **'Learning' measures** for improved dissemination and use of findings. (Page 29 of the report)
11. **Recommendation Eleven:** Our eleventh recommendation would be that the LLST **prioritises the recruitment of a Programme Manager for the scheme that can oversee the development of an MEL strategy** (Page 30 of the report)

### 3. Name of the Scheme

12. **Recommendation Twelve:** Our twelfth recommendation is that the LLST governance team expands the pool of consultants working on assessment, MEL and capacity development for the programme through an external open recruitment process and maintains a roster of consultants that is both inclusive and diverse. (Page 31 of the report)

### 4. Plan for diversifying pool of assessors and capacity building consultants

13. **Recommendation Thirteen:** Our thirteenth recommendation is that the LLST governance team introduces an Advisory Panel as proposed, or a variation of it, to ensure it meets its intention to reach those most in need of accessing specialist legal advice. We also recommend that LLST considers whether the remit of an advisory panel might be extended to cover the whole work of the LLST. (Page 33 of the report)

### 5. Review options for sustainable funding and develop proposals

14. **Recommendation Fourteen:** Our fourteenth recommendation is that the LLST Governance team reviews and adopts the proposed (or similar) process for a transition period and proceeds with implementation as soon as feasible. (Page 35 of the report)



<b>Committee:</b> Funding Committee of the City Bridge Foundation Board	<b>Date:</b> 16 September 2024
<b>Subject:</b> Grant Funding Activity: Period Ended 27 August 2024	<b>Public</b>
<b>Report of:</b> Sacha Rose-Smith, Chief Funding Director	<b>For Decision</b>
<b>Report author:</b> 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 2024 through to 27 August 2024; the remaining 2024/25 grants budget; grants spend to date and for this meeting by London Borough compared with the Multiple Index of Deprivation and any grant variations that have been approved under delegated authority.

## Recommendations

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

- i) Receive this report and note its contents; and
- ii) Approve 10 grant Rejections in Appendix 3.

## Main Report

### Budget and Applications Update

1. There have been 155 grants awarded from the main grants programmes to date in 2024/25 (since 1 April 2024) with a net grant spend of £20.3 million. This leaves the remaining budget for 2024/25 at £61.1 million.
2. In addition to the grants listed below, 52 applications were withdrawn since the last meeting to 27 August 2024.
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**.

### Grant Rejections

4. A list of all grants recommended for rejection is provided at **Appendix 3**.
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 CBF, 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** advise the Funding Committee of funds approved under delegated authority and urgency procedures from June 2024 to 27 August 2024.

## Conclusion

8. This report provides details of grant funding activity since the last meeting of the Funding Committee in June 2024.

## 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 Rejections over 500k
- Appendix 4: Grant Rejections approved under Delegated Authority
- Appendix 5: Grant Variations
- Appendix 6: Funds Approved under Delegated Authority or Urgency Requests

## Scott Nixon

Head of Managing Director's Office

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## Appendix 1: Budget for Designated Grant-making and Restricted Funds to date (24/25 financial year)

<i>Date of this report: 30/08/24</i>	Designated Fund - Bridging Divides, Cornerstone, Bridge Fund	Restricted funds - LCRF, TFL, RRR2	TOTAL
£'000			
Funds balance at 1 April 2024 per draft accounts	130,000	0	130,000
Designated surplus Transfer to 2024/25	30,000		30,000
<i>Already earmarked for projects</i>	(7,837)	0	(7,837)
<b>Funds available for grantmaking at 1/4/24</b>	<b>152,163</b>	<b>0</b>	<b>152,163</b>
<b>Grants awarded 2024/25</b>			
<i>Grants approved &amp; reported to Cttee to date</i>	(10,360)	0	(10,360)
<i>Grants approved under delegated authority &amp; reported to Cttee</i>	(8,480)	0	(8,480)
<i>Grants to be approved at Sept Cttee 24/25</i>	(1,441)	0	(1,441)
<b>TOTAL AWARDED TO DATE OF REPORT</b>	<b>(20,282)</b>	<b>0</b>	<b>(20,282)</b>
Number of grants awarded	155	0	155
Write backs, variations & revocations financial YTD	(155)	0	(155)
Number of grants revoked, varied or written back	4	0	4
Other costs incl. staff costs associated with £200m uplift	(458)	0	(458)
Conditional grants		0	0
Stepping Stones loan awarded under Bridging Divides		0	0
<b>TOTAL SPENT/ALLOCATED TO DATE</b>	<b>(20,895)</b>	<b>0</b>	<b>(20,895)</b>
<b>Subtotal: available at the date of this report</b>	<b>131,268</b>	<b>0</b>	<b>131,268</b>
<b>Remaining funds available</b>	<b>131,268</b>	<b>0</b>	<b>131,268</b>
<b>2024/25 budget summary</b>			
Approved Grants Budget 2024/25	80,600	0	80,600
Add non-grant spend budget 2024/25	1,100	0	1,100
<b>Budget for 2024/25</b>	<b>81,700</b>	<b>0</b>	<b>81,700</b>
<i>Grants awarded to date of this report net of revocations</i>	(20,126)	0	(20,126)
<i>Other costs and allocations</i>	(458)	0	(458)
<b>Budget available to Committee at report date</b>	<b>61,116</b>	<b>0</b>	<b>61,116</b>

\*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.

**Index Multiple Deprivation (Average borough score)<sup>1</sup>**

				Enf					
				59					
		Mrw	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					

<sup>1</sup> ENF Enfield, HRW Harrow, BRN Barnet, HGY Haringey, WTH Waltham Forest, HDN Hillingdon, ELG Ealing, BRT Brent, CMD Camden, ISL Islington, HCK Hackney, RDB Redbridge, HVG Havering, HNS Hounslow, HMS Hammersmith & Fulham, KNS Kensington & Chelsea, WST Westminster, CTY City of London, TOW Tower Hamlets, NWM Newham, BAR Barking, RCH Richmond, WNS Wandsworth, LAM Lambeth, SWR Southwark, LSH Lewisham, GRN Greenwich, BXL Bexley, KNG Kingston, MRT Merton, CRD Croydon, BRM Bromley, STN Sutton



**Main grants (upper, and per thousand population, lower) from start of Bridging Divides (September 2018) to Committee date (excluding LCRF) – rounded to nearest £100K:**

				Enf			
				£1,700,000			
				£14,000			
		Hrw	Brn	Hgy	Wth		
		£2,400,000	£7,100,000	£4,600,000	£3,100,000		
		£27,000	£48,000	£44,000	£30,000		
Hdn	Elg	Brt	Cmd	Isl	Hck	Rdb	Hvg
£2,300,000	£2,900,000	£3,400,000	£17,000,000	£22,200,000	£18,100,000	£1,300,000	£1,300,000
£21,000	£21,000	£29,000	£183,000	£230,000	£170,000	£12,000	£13,000
Hns	Hms	Kns	Wst	Cty	Tow	Nwm	Bar
£1,700,000	£5,000,000	£8,200,000	£11,200,000	£13,200,000	£12,300,000	£6,000,000	£2,000,000
£16,000	£61,000	£123,000	£118,000	£2,691,000	£102,000	£52,000	£26,000
	Rch	Wns	Lam	Swr	Lsh	Grn	Bxl
	£3,500,000	£5,300,000	£14,500,000	£13,200,000	£5,300,000	£3,000,000	£900,000
	£43,000	£38,000	£108,000	£101,000	£43,000	£26,000	£10,000
	Kng	Mrt	Crd	Brm			
	£2,000,000	£2,800,000	£2,500,000	£1,800,000			
	£30,000	£35,000	£16,000	£13,000			
		Stn					
		£1,400,000					
		£17,000					

  

KEY
Total £
Per 1000



**Main Grants (upper, and per thousand population, lower) for this Committee – rounded to nearest £100K:**

				Enf			
				£0			
				£0			
		Hrw	Brn	Hgy	Wth		
		£0	£500,000	£100,000	£0		
		£0	£3,000	£1,000	£0		
Hdn	Elg	Brt	Cmd	Isl	Hck	Rdb	Hvg
£0	£0	£100,000	£600,000	£1,100,000	£100,000	£0	£0
£0	£0	£1,000	£6,000	£11,000	£1,000	£0	£0
Hns	Hms	Kns	Wst	Cty	Tow	Nwm	Bar
£0	£100,000	£100,000	£600,000	£200,000	£400,000	£200,000	£100,000
£0	£1,000	£1,000	£6,000	£45,000	£3,000	£2,000	£1,000
	Rch	Wns	Lam	Swr	Lsh	Grn	Bxl
	£0	£100,000	£1,100,000	£100,000	£100,000	£500,000	£0
	£0	£1,000	£8,000	£1,000	£1,000	£4,000	£0
		Kng	Mrt	Crd	Brm		
		£0	£100,000	£0	£0		
		£0	£1,000	£0	£0		
			Stn				
			£0				
			£0				

  

KEY
Total £
Per 1000

Lowest Quartile  
2nd Quartile  
3rd Quartile  
Upper Quartile



### Appendix 3: Grants Recommended for Rejection Over £500k

Application Date	ID	Applying Organisation	Declination Notes	Requested Amount	Funding Manager
01/08/2024	25464	Art4Space CIC	The application was for a Lambeth-specific suicide prevention project which did not meet requirements for work to be expanded London-wide by the end of the funded period.	£978,099.00	Abi Sommers
02/08/2024	25468	Bikur Cholim	The applicant's named partner is a public health trust and therefore the application is not eligible for funding under this programme.	£979,785.00	Abi Sommers
01/08/2024	25429	Campaign Against Living Miserably	The proposal did not sufficiently demonstrate how the proposed activities will effect systems change in the proposed area of work.	£999,294.00	Abi Sommers
02/08/2024	25232	Community Activities Project Ealing (CAPE)	The proposal did not demonstrate that the applicant has sufficient track record to achieve key elements of the project.	£1,050,000.00	Abi Sommers
02/08/2024	25709	Depaul UK	The applicant did not apply in collaboration with a partner organisation, and thus is ineligible for funding under this programme.	£999,336.00	Abi Sommers
02/08/2024	25632	Grassroots Suicide Prevention	The application did not sufficiently demonstrate how it would be a true partnership project, rather than using 'partner' organisations for consultancy support.	£1,049,872.00	Abi Sommers
01/08/2024	25651	Grassroots Suicide Prevention	The proposal did not sufficiently demonstrate how the proposed activities will effect systems change in the proposed area of work.	£1,050,000.00	Abi Sommers
01/08/2024	25048	Mental Health Innovations	The proposal did not sufficiently demonstrate how the proposed activities will effect systems change in the proposed area of work.	£1,050,000.00	Abi Sommers



Application Date	ID	Applying Organisation	Declination Notes	Requested Amount	Funding Manager
30/07/2024	25332	Mind in Haringey	The application was for a North Central London suicide prevention project which did not meet requirements for work to be expanded London-wide by the end of the funded period.	£1,040,480.00	Abi Sommers
02/08/2024	25467	stem4	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	£1,044,675.00	Abi Sommers

#### Appendix 4: Grant Rejections Approved under Delegated Authority

\*Note that there are more rejections than usual within this appendix as we are reporting on some historic grant rejections.

ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
23919	Abbotshall Healthy Lifestyle Centre	23/07/2024	£0.00	Rejecting due to negative reserves	Lydia Parr
23502	ADHD Embrace	21/06/2024	£100,000.00	The outlined activities are not a good fit with the priorities of the Small Grants Programme and the applicant has not demonstrated how the organisation and provision is shaped by CYP with ADHD.	Lily Davies
24087	Ailsa's Aim	14/06/2024	£50,000.00	The activities outlined in the application fall outside the programme priorities, The organisation also applied for similar costs in October 2023 and were rejected therefore cannot reapply for 1 year from that date.	Geraldine Page



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
9388	Alpha Grove Centre	04/06/2009	£0.00	Organisation not stable enough at present time to be able to manage an eco-audit.	City Bridge Trust
24610	Angel Community Canal Boat Trust	23/07/2024	£16,875.00	The applicant did not demonstrate that it had the understanding of the specific needs of the beneficiaries in the design of the project proposed.	John Mulligan
24504	Appiah Day care	30/07/2024	£150,000.00	The organisation does not have a full year's signed accounts, and thus does not meet the Foundation's eligibility criteria.	Abi Sommers
24257	Art4Space CIC	15/07/2024	£199,450.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
24327	ASTON-MANSFIELD	15/07/2024	£199,999.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding. Further, based on the information provided by the applicant, the assessor has not been assured that the organisation's safeguarding policies and processes are sufficiently robust.	Abi Sommers
24777	Attend	15/07/2024	£165,734.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
23982	Autism Voice	15/07/2024	£169,000.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
23763	Beyond Equality	23/07/2024	£458,014.00	The project is not yet developed enough with specific outcomes and wider impact not clear.	Natalia Griffiths



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
15598	Birth Companions	08/08/2019	£0.00	Rejected as the organisation does not own or lease a property.	Geraldine Page
24832	Black Learning Achievement and Mental Health (BLAM UK)	15/07/2024	£200,000.00	The application is for group therapy which is not an eligible activity under the Making London More Liveable funding criteria.	Abi Sommers
21242	BookTrust	25/06/2024	£368,937.00	Based on the latest audited accounts filed with the Charity Commission, the proposal could be self-funded from reserves held in excess of the organisation's policy target.	Matthew Robinson
24411	Brunel Museum	30/07/2024	£190,392.00	The application for a volunteer mentorship program does not align with the Foundation's "Improve Quality of Giving" criteria, which focus on enhancing the scale and quality of giving. The project does not meet the programme's aim to foster stronger, inclusive donor-voluntary sector links or enhance sustainability for struggling communities in Greater London.	Geraldine Page
24323	Change, Act! CIC	10/07/2024	£33,054.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
24938	Chorus Therapeutic Partnerships CIC	02/08/2024	£59,173.00	The organisation has only 2 directors and was recently constituted meaning it was unable to provide a year of accounts at time of application.	Geraldine Page
24815	Chronically Marvellous CIC	15/07/2024	£125,000.00	The organisation does not have a full year's signed accounts, and thus does not meet the Foundation's eligibility criteria.	Abi Sommers





ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24452	Circus for Survivors CIC	10/07/2024	£9,988.00	The organisation does not have a full year's signed accounts, and thus does not meet the Foundation's eligibility criteria.	Abi Sommers
23334	Climate Ed	21/06/2024	£142,761.00	Does not sufficiently address Trust's priorities and outcomes	Ben Banks
24345	Community African Network	30/07/2024	£127,695.00	The organisation type is not eligible for funding from the Foundation.	Geraldine Page
23568	CPotential	23/07/2024	£57,320.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Geraldine Page
17027	Crabtree Films	04/02/2021	£3,000.00	Ineligible organisation the applicant is not registered with an appropriate regulatory body.	City Bridge Trust
21726	CRAY WANDERERS YOUTH JUNIOR CIC	30/10/2023	£0.00	Organisation structure ineligible for funding.	Lydia Parr
23783	Creating New Beginnings Charity	02/08/2024	£15,000.00	The request is for capital funding and so falls outside the priorities for City Bridge Foundation's food poverty strand.	Geraldine Page
21111	Dogs Trust	06/09/2023	£35,128.00	Not previously funded by CBT. Large, national org. Applied under Tackling Abuse strand, to provide a pet fostering service to people leaving abusive homes with pets. Support is aimed at pets, rather than direct support to people affected by abuse.	Geraldine Page



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
23809	DWRM	21/06/2024	£160,297.00	The funding application is not recommended as it does not pass our financial due diligence checks.	Chris Walker
22423	East Barnet Royal British Legion Club	21/06/2024	£125,143.00	The application for funds to support capital works to increase accessibility will primarily be to the benefit of club members and not the wider local community.	John Mulligan
25077	East London Mosque and London Muslim Centre	23/07/2024	£0.00	Organisation in a position to self fund.	Lydia Parr
24480	EFA London	15/07/2024	£160,542.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
22558	Embracing Age	23/07/2024	£85,500.00	Failed due diligence	Kerry Luker
20166	Endure Mentoring	28/06/2023	£26,000.00	Application from a small grass roots organisation to open clothing pop up shops does not meet the Trust's priorities of increasing the quality and scale of giving.	Kristina Glenn
24448	Family Action	15/07/2024	£199,887.00	The organisation's annual income is well in excess of the priority level for this programme. Further, the application does not sufficiently focus on the Foundation's stated priority outcomes for Making London More Liveable funding.	Abi Sommers
24171	Family Friends	15/07/2024	£118,273.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
23318	Family Lives	21/06/2024	£120,701.00	This application cannot be recommended for funding. Although it supports young carers, it does not align with the CYP strand criteria, which focuses on "support for vulnerable parents and carers of preschool children (aged 0–5)."	Geraldine Page
23934	FOR WOMEN CIC	10/07/2024	£90,500.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24027	Fulham Good Neighbour Service	30/07/2024	£199,257.00	Ineligible due to the end date of their grant, because of changes to funding programmes	Andrew Jermey-Boys
25000	Get Set 4 Tennis CIC	23/07/2024	£12,629.00	The application proposes to deliver school-based activities, which are ineligible for City Bridge Foundation funding. Further, the application does not sufficiently demonstrate how it will meet the Foundation's desired funding outcomes.	Geraldine Page
23980	Global Relief Plan (GRP)	31/07/2024	£300,000.00	The organisation is newly established and is not eligible.	Geraldine Page
22587	Go Beyond	31/05/2024	£19,200.00	This application cannot be recommended for funding, the proposed project involves funding overnight trips with children, which is not within the scope of CBF's funding criteria.	Geraldine Page



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
23942	Grassroots for Good	25/06/2024	£108,000.00	This application under Children & Young People (CYP) strand focuses on increasing football organisations without addressing specific support for CYP or detailing age groups and beneficiaries. Outcomes and monitoring emphasise club metrics rather than direct impact on young people. Proposal lacks alignment with the Foundation's priorities.	Geraldine Page
20290	Grassroots for Good	11/08/2023	£104,000.00	The applicant is still in the early stages of a spin-out from Hackney Wick FC and would benefit from a period of development and consolidation before bidding.	Chris Walker
24210	Hackney Lighthouse CIO	10/07/2024	£100,000.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
23480	Healthcare Workers' Foundation	23/07/2024	£58,000.00	Does not sufficiently address Trust's priorities and outcomes	Cecile Hyafil Guillerme
23019	Hello Beautiful Foundation	28/06/2024	£59,688.00	Based on the financial information provided by the applicant your officer has not been assured that the organisation's management of its finances is sufficiently robust.	Mitva Shah
24337	Hestia Housing and Support	15/07/2024	£175,240.00	The organisation's annual income is well in excess of the priority level for this programme. Further, the application does not sufficiently focus on the Foundation's stated priority outcomes for Making London More Liveable funding.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24768	Holistic Support Ltd	23/07/2024	£75,000.00	Based on the financial information provided by the applicant the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Geraldine Page
23843	Hong Kong Watch	30/07/2024	£150,881.00	Organisation has large reserves in excess of its policy	Cecile Hyafil Guillerme
23035	Hopeville CIC	23/07/2024	£37,500.00	Based on the financial information provided by the applicant your officer has not been assured that the organisation's management of its finances is sufficiently robust. Accounts show a deficit income and negative free reserves.	Mitva Shah
24113	Horizon Alternative Education CIC	09/08/2024	£18,300.00	The applicant has only two directors and therefore does not meet City Bridge Foundation's governance requirements.	Geraldine Page
24085	I Like Networking CIC	21/06/2024	£100,000.00	The application is for mentoring women with 5+ years in creative industries who have taken a career break to work with them to help them to get back into the industry at similar level that they held previously. It does not meet the priorities of our voice and leadership programme.	Geraldine Page
24508	Iconic Steps Film Academy C.I.C	24/07/2024	£401,503.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24529	Kingston Samaritans	10/07/2024	£5,500.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24131	Ladies of Virtue Outreach CIC	15/07/2024	£155,000.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24394	Learning Through The Arts CIC	15/07/2024	£100,472.00	The application is for a general community project with people with complex needs and does not focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24958	Legacy Foundation Global CIC	30/07/2024	£221,000.00	Based on the information provided in the application form, the request does not sufficiently meet your requirements under this strand	Hannan Ali
24718	Living Song CIC	15/07/2024	£163,530.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers
23708	Living Truth CIC	23/07/2024	£59,650.00	The application is not a good fit for the eligibility criteria of the Small Grants Programme.	Caspar Cech-Lucas
19100	London Development Trust	11/03/2022	£0.00	Manor House Trust, which is part of London Development Trust, has already received an eco audit.	Geraldine Page
16578	London HV Chaplaincy	04/02/2021	£48,046.00	The proposal does not meet the priorities of Small Grants programme. Grant request exceeds funds available - £48,046 over 3 years. Free reserves are diminishing as expenditure has been greater than income in recent years.	City Bridge Trust
24805	M.E.M Academy C.I.C	15/07/2024	£200,000.00	Based on the information provided by the applicant, the assessor has not been assured that the organisation's safeguarding policies	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
				and processes, and finances are sufficiently robust.	
24544	ManKind Initiative	10/07/2024	£79,000.00	The application does not sufficiently focus on the Foundation's stated priority outcomes for Making London More Liveable funding.	Abi Sommers
24124	Menopause and Cancer Community Interest Company	23/07/2024	£53,369.00	The proposal is for an informational and educational programme for those with cancer and the menopause with a focus on general empowerment, rather than strengthening voice or leadership. As such, it does not meet the Foundation's criteria for voice and leadership funding.	Abi Sommers
24464	Mental Fight Club	15/07/2024	£151,246.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24615	Meridian Wellbeing	15/07/2024	£199,792.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
23598	Messy Play CIC	02/08/2024	£40,000.00	The application is from a relatively recently established organisation that ended its first financial year with no reserves indicating some concerns about financial viability for a multi-year grant.	Geraldine Page
22073	Mile Rainbow C.I.C (MRCIC)	12/07/2024	£35,244.00	The application lacks assurance of robust governance and does not sufficiently demonstrate that the project scope is based on local need.	Kerry Luker



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24595	Mile Rainbow C.I.C (MRCIC)	10/07/2024	£33,628.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24676	Mind in Camden	15/07/2024	£195,324.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers
24486	Mind in Croydon Ltd	15/07/2024	£182,473.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24120	Minds United Football Club CIC	15/07/2024	£159,350.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
23279	Miracles	11/05/2024	£12,666.00	The proposed use of purchased fresh food distributed from Reading does not align with City Bridge Foundation's Funding Priority or sustainability principles. The bid also needed strengthening in terms of responding to the specific needs of people in crisis as well as on-going support and referrals.	Chris Walker
24820	NAA WORLD CIC	31/07/2024	£310,000.00	The organisation is a new organisation and does not have a full year's signed accounts, thus it does not meet the Foundation's eligibility criteria.	Geraldine Page





ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24069	National Autistic Society	15/07/2024	£152,857.00	The AIMHS project described in the proposal is an advice, casework and advocacy service for autistic individuals detained in an institutional setting. Primary outcomes do not include social isolation or connectedness, or related areas and thus do not sufficiently address the Foundation's target outcomes for this programme.	Abi Sommers
24219	Newham All Star Sports Academy	23/07/2024	£90,000.00	The proposal targets 'at risk' and inactive young people, rather than those actively engaged in child criminal exploitation. As such, it does not sufficiently target the Foundation's funding priorities.	Abi Sommers
24279	Noa Girls	15/07/2024	£200,000.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers
24071	Offploy CIC	02/08/2024	£69,335.00	The applicant has only two directors, is based outside London, and provides limited evidence of its ability to deliver the proposed services within the capital.	Tim Wilson
24479	One-To-One (Enfield)	24/07/2024	£307,308.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
21777	Our Yard Ltd	25/06/2024	£278,751.00	Organisation ineligible	Geraldine Page



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
18481	Pamper Indulge and Give	11/06/2021	£29,440.00	Application does not meet priorities of the Small Grants Programme. The working name of the organisation is not culturally sensitive to the area of benefit.	City Bridge Trust
25315	Papa Academy CIC	02/08/2024	£68,040.00	The application is not specifically targeted towards eligible beneficiaries and therefore not eligible for the Small Grants Programme.	Caspar Cech-Lucas
21260	Power2 Ltd	17/07/2024	£274,591.00	The funding application is not recommended as the proposed activities do not sufficiently differ from statutory provision. The proposed work overlaps with existing Personal, Social, Health, and Economic Education (PSHE) and Mental Health Support Teams (MHSTs) in schools.	Lara Rufus-Fayemi
24661	PramDepot C.I.C.	15/07/2024	£114,406.00	The application does not sufficiently demonstrate how it provides an ongoing service to reduce isolation or increase community connection, thus it is not eligible under the Making London More Liveable funding criteria.	Abi Sommers
24498	Progressay Impact CIC	28/07/2024	£25,000.00	Recommended for rejection on basis that the application presents a weak link between the proposal and future social investment.	Matthew Robinson
24755	RBKares	10/07/2024	£57,540.00	The organisation does not have a full year's signed accounts, and thus does not meet the Foundation's eligibility criteria.	Abi Sommers
24224	Refuge	15/07/2024	£198,701.00	Funding is requested primarily for an Enhanced Casework IDVA whose key duties would fall outside of scope of the MLML fund's priority funding areas.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24291	Rehabit	10/07/2024	£10,000.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding. Further, based on the information provided by the applicant, the assessor has not been assured that the organisation's safeguarding policies and processes are sufficiently robust.	Abi Sommers
24809	Resources for Autism	15/07/2024	£200,000.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers
24681	Reverse The Trend Foundation	15/07/2024	£144,960.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
22305	Richmond Gymnastics Association	06/12/2023	£0.00	Insufficient wider community use.	Lydia Parr
25338	School21	29/07/2024	£0.00	Organisation is a school and therefore ineligible for funding.	Lydia Parr
22118	Scope	21/06/2024	£248,677.00	Organisation has large reserves in excess of its policy	Natalia Griffiths
23220	SENSE OF LOCALITY CIC	31/05/2024	£28,087.00	This application fails due diligence in its governance. The organisation currently has only two Directors, with one holding significant control (75% or more voting rights). Additionally, it lacks an appropriate Asset Lock in its constitution, nor does it ensure the body delivers charitable work in line with the organisation's objects. Given these issues, the organisation is not eligible under CBF criteria.	Geraldine Page



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
19518	Sherwood Park Hall Community Interest Company	26/07/2022	£30,000.00	The organisation would need to demonstrate stronger governance to be considered for a CBT grant award.	Anneka Singh
24201	Skills Enterprise	15/07/2024	£199,431.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24174	SOCIAL ORGANISATION FOR UNITY AND LEISURE	15/07/2024	£150,000.00	The application does not sufficiently demonstrate how the organisation proposes to support the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24801	Somers Town Space CIC	10/07/2024	£45,000.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24290	South Camden Community Trust	23/07/2024	£83,897.00	This application is for work delivered by a school, and as such is ineligible for funding.	Abi Sommers
22958	Sported Foundation	17/07/2024	£445,606.00	The application proposes the delivery of a significant capacity building programme benefiting London's grassroots sports clubs. It fails to demonstrate the impact of similar work that was funded previously by the Foundation between 2020-23 nor how these plans build on what went before.	John Mulligan
25514	St Joseph's Hospice Hackney	16/09/2024	£0.00	Organisation has large reserves in excess of its policy	Lydia Parr
24421	St Luke's Hospice (Harrow and Brent)	26/07/2024	£75,000.00	Ineligible due to the end date of their grant, because of changes to funding programmes	Andrew Jermey-Boys



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
25287	St Martin West Acton	23/07/2024	£2,650.00	The project applied for is not targeted towards eligible beneficiaries and is therefore too general to be eligible for the Small Grants Programme.	Caspar Cech-Lucas
24591	Step Out Mentoring (The Wells Trust)	10/07/2024	£39,635.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24091	Street Storage	30/07/2024	£200,000.00	This application does not clearly demonstrate how it reduces isolation and increases community connection for priority areas.	Hannan Ali
24786	Studio Upstairs	15/07/2024	£192,765.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
18450	Sunah's Crisis Team	13/09/2021	£9,900.00	The application is from an organisation with no track record of delivering the proposed activities. The financial viability of organisation is also of concern based on the forecast provided.	City Bridge Trust
24154	Supreme Fitness CIC	23/07/2024	£86,400.00	The applicant's Organisation structure is a CIC limited by shares. CBF cannot fund organisations of this structure	Caspar Cech-Lucas
24831	SurvivorsUK	15/07/2024	£193,320.00	The application is for funding for a helpline and the application does not sufficiently demonstrate how this will reduce isolation and help people to connect to a community on an ongoing basis, thus it does not meet the Making London More Liveable funding criteria.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24397	Sutton Carers Centre Charity Company	15/07/2024	£187,990.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24389	Sycamore Trust UK	15/07/2024	£155,787.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
21564	The Children's Society	25/06/2024	£355,000.00	The proposal is to offer cognitive behavioural therapy (CBT) as the main therapy provision, which does not meet the funding criteria for this strand. The application also lacks sufficient evidence of track record and expertise in delivering a mental health therapy service and working with the proposed target beneficiary groups in the local area. The applicant also appears to have sufficient reserves to self-fund, so a grant from the Foundation cannot be seen as a priority at this time.	Kate Halahan
16577	THE ENSIGN YOUTH CLUB	04/02/2021	£30,000.00	The level of free unrestricted reserves held by the organisation is unclear from the accounts (as is other important financial information) but appear to equate to significantly more than one year's worth of expenditure. Moreover the application and supplementary information, including an unclear reserves policy, does not explain why the organisation cannot fund the project from its reserves.	Matthew Robinson
19626	The Fawcett Society	25/01/2023	£98,069.00	Only one third of the project's activities take place in London. No compensation or support in place for the subjects. The project's third	Julia Mirkin



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
				partner does not feature on the project budget, failing a minimum of three partners for consortium bids.	
24167	The Feast Youth Project	30/07/2024	£129,999.00	Does not sufficiently address Trust's priorities and outcomes	Hannan Ali
17444	The Florence Trust	04/02/2021	£15,400.00	Based on the application form and publicly available information, the organisation does not appear to have a significant track record of delivering this type of project, whilst the target audience appears broader than the remit of CBT priorities. In addition, one of the three project outcomes does not sufficiently meet the priorities of your Small Grants Programme.	Matthew Robinson
24328	The Forward Trust	15/07/2024	£197,085.00	The organisation's annual income is well in excess of the priority level for this programme. Further, the application does not sufficiently focus on the Foundation's stated priority outcomes for Making London More Liveable funding.	Abi Sommers
15340	The Geological Society of London	25/03/2019	£0.00	The organisation has a large turnover and significant reserves and could therefore fund this work itself.	Geraldine Page
24050	The Listening Place	15/07/2024	£194,133.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24477	The Maytree Respite Centre	15/07/2024	£200,000.00	The organisation's model of work revolves around residential stays and thus is not eligible for City Bridge Foundation funding. The application requests funding for crisis intervention which is not an eligible activity under the Making London More Liveable funding criteria.	Abi Sommers
24286	The New Normal	10/07/2024	£62,500.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
21581	The Old Vic	04/12/2023	£0.00	Organisation in a position to self-fund.	Lydia Parr
25504	THE PCC OF ST. SEPULCHRE WITHOUT NEWGATE	06/08/2024	£0.00	Organisation has a free unrestricted reserves deficit.	Lydia Parr
22047	THE PCC OF THE ECCLESIASTICAL PARISH OF HOLY TRINITY CLAPHAM, SOUTHWARK	08/11/2023	£0.00	Organisation in a position to self-fund.	Lydia Parr
24814	The Playground Theatre	10/07/2024	£68,965.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24658	THE ROOT MHSF COMMUNITY INTEREST COMPANY	23/07/2024	£51,998.00	The organisation is based outside of London and does not benefit London residents.	Geraldine Page
23379	The Shakespeare Globe Trust	25/05/2024	£0.00	The application from The Shakespeare Globe Trust for an Eco Audit is not recommended due to the organisation holding high reserves.	Lydia Parr
21651	The South London Liberal Synagogue	04/12/2023	£0.00	Insufficient wider community use.	Lydia Parr





ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
19672	The Thought Foundation Ltd	18/01/2023	£10,000.00	The proposed project does not meet the criteria of the funding programme.	Lorna Chung
24299	The Victory Services Club	07/08/2024	£0.00	Organisation's reserves are in a position to self fund.	Lydia Parr
19130	The Winston Churchill Memorial Trust (The Churchill Fellowship)	14/02/2022	£0.00	The applicant has sufficient reserves that self-funding is possible.	Geraldine Page
24145	Together for Mental Wellbeing	15/07/2024	£200,000.00	Funding is not recommended because the proposal risks duplicating statutory responsibilities for mental health care.	Abi Sommers
24729	Trapped in Zone One	15/07/2024	£197,500.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24098	Trinity In Camberwell	23/07/2024	£0.00	Organisation's reserves above policy and in a position to self fund.	Lydia Parr
23698	Tutors United	21/06/2024	£39,062.00	Activities to be delivered by programme fall outside the Trust priorities. Group intends to support primary aged school children (10-13yrs) with literacy and numeracy activities in a creative way.	Geraldine Page
23834	Up 'N Away	23/07/2024	£30,000.00	The request was received under the Food poverty programme, but the proposed work does not distribute donated food. Additionally, the bid only requests food costs, which falls outside CBT's stated funding policy.	Andrew Jermev-Boys
24343	Urban Growth Learning Gardens	15/07/2024	£137,543.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
25180	Urban Uprising	06/08/2024	£38,545.00	Based on the information provided by the applicant, the proposed activities do not meet the criteria of your policy for eligible children and young people support.	Geraldine Page
24457	Voices of Hope	15/07/2024	£197,370.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
14970	Voluntary Action Lewisham	20/05/2019	£0.00	Rejected as the organisation stated it will reapply at a later date.	Julia Mirkin
16946	Weavers Community Forum	04/02/2021	£30,000.00	Target audience falls outside your priorities. Equally, your officer is not convinced that the proposed project bringing older people (50+) and homeless people together is viable. No detail or evidence provided of the organisation having any track record of working with homeless people.	City Bridge Trust
24020	WEPT (Women Empowerment Project & Training)	10/07/2024	£60,000.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
24180	West Ham United Foundation	30/07/2024	£150,000.00	Although the proposals reflected impressive accessibility gains and thus represent a strong fit with CBF's funding priority supporting access improvements, the applicant is in the privileged position of having the project's build costs being underwritten by a close partner organisation. As such this is considered a low priority for CBF funding.	Matthew Robinson
22202	Wilder City Ltd	21/06/2024	£131,625.00	The applicant is ineligible as a private company.	Kate Halahan



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
22637	Women in Prison	21/06/2024	£165,220.00	The proposed work does not align closely with the criminal justice funding programme priorities and proposed outputs lack sufficient support for beneficiaries.	Anneka Singh
24657	Woolwich Service User Project (WSUP)	10/07/2024	£74,483.00	The application does not sufficiently focus on the Foundation's stated priority groups for Making London More Liveable funding.	Abi Sommers
24589	Writerz and Scribez CIC	10/07/2024	£100,000.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust.	Abi Sommers
24647	Xenia	10/07/2024	£71,143.00	Does not sufficiently address Trust's priorities and outcomes	Abi Sommers
23997	Yad Voezer Day Centre Ltd	15/07/2024	£123,501.00	The application does not sufficiently focus on the Foundation's stated priority groups and outcomes for Making London More Liveable funding.	Abi Sommers
23276	YHS Boys School	25/05/2024	£0.00	The organisation is ineligible as it is a school and its unrestricted reserves are in deficit.	Lydia Parr
24158	You Vs You CIC	10/07/2024	£60,139.00	The organisation is a community interest company limited by shares and therefore not a type of organisation which is eligible for City Bridge Foundation funding.	Abi Sommers
18465	Young star Mentoring	08/09/2021	£9,390.00	Application seeks funding for activities that fall outside the priorities of the Small Grants programme and is therefore ineligible for funding.	City Bridge Trust



ID	Applying Organisation	Decision Date	Requested Amount	Declination Notes	Funding Manager
24104	Your Learning Voice CIC	23/07/2024	£30,000.00	Based on the financial information provided by the applicant, the assessor has not been assured that the organisation's management of its finances is sufficiently robust. Accounts for 2021/22 show no reserves.	Abi Sommers
23325	Your Place (London) Ltd	30/07/2024	£118,333.00	The application does not sufficiently fit under the Foundation's current funding priorities.	Cecile Hyafil Guillerme

#### Appendix 5: Grant Variations

ID	Applying Organisation	Funding Manager	Variation Type	Variation Amount	Variation Funding Committee Summary
20549	BCU Life Skills Centre	Lara Rufus-Fayemi	Uplift	£3,000.00	Recommending a 10% uplift to BCU to cover the London Living Wage equating to £3,000, this represents 10% of the value of the grant. This is to be spread equally over 3 years, e.g £1000 per year. The grant holder has been in touch to request an uplift to accommodate a shortfall in funding as a result of the London Living Wage increase.
19645	Islington Centre for Refugees and Migrants	Kate Halahan	Uplift	£19,290.00	£19,290 additional support awarded to contribute towards costs of staff wellbeing and retention in the Support Service.
16025	The Sound Lounge Trust CIC	Lydia Parr	Revocation	-£400.00	On 15/02/2021 a grant of £2,000 was awarded to The Sound Lounge Trust CIC for the purpose of an eco audit and the associated costs. After all activities have taken place a balance of £400 remains,



ID	Applying Organisation	Funding Manager	Variation Type	Variation Amount	Variation Funding Committee Summary
					therefore a revocation of the remaining amount has been approved.
20059	Kids Can Achieve	Abi Sommers	Revocation	-£65,000.00	On 26/06/2023 the following grant was made to Kids Can Achieve - £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. Kids Can Achieve is now merging with LDN London. A strategic initiative has been prepared for the remaining year's funding (£65,000) to be made to LDN London. The remaining £65,000 out of the grant of £129,000 to Kids Can Achieve be revoked.



**Appendix 6: Funds Approved under Delegated Authority or Urgency Requests**

<b>ID</b>	<b>Applying Organisation</b>	<b>Assessment Approved Date</b>	<b>Grant Description</b>	<b>Awarded Amount</b>	<b>Funding Manager</b>
22262	Ace of Clubs Clapham	05/06/2024	£248,105 over three years (£78,700, £82,635 £86,770) for 0.5 FTE Centre Manager salary, 0.5 FTE Chef salary, Takeaway service costs, and a contribution towards the centre's utilities, rent and cleaning costs in order that Ace of Clubs Clapham can continue to provide daily hot meals and wraparound support, alleviating food poverty for those experiencing homelessness.	£248,105.00	Kate Halahan
22348	ACEVO - Association of Chief Executives of Voluntary Organisations	10/07/2024	£250,000 over five years (£50,000 x 5) to ensuring charity CEOs in London have the support, tools, and guidance needed for their organisations to make the greatest possible impact.	£250,000.00	Hannan Ali
23327	Acheinu Limited T/A The Boys Clubhouse	31/05/2024	£30,829 over 3 years (£10,229; £10,246; £10,354) contribution towards the psychotherapy and counselling staffing, therapy and activity costs, supervision, monitoring and evaluation.	£30,829.00	Hannan Ali
21178	Action Space London Events Ltd	12/07/2024	£215,000 over five years (£50,000; £45,000; £42,500; £40,000; £37,500) towards core costs, largely in support of the Supported Studios Programme (contributions to studio hire, freelance Artist Facilitators and exhibition and event costs).	£215,000.00	Lily Davies
23390	Age UK Lewisham & Southwark	31/05/2024	£2,800 (7 days) to provide an eco audit.	£2,800.00	Lydia Parr



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
22405	Age UK Westminster	21/06/2024	£117,488 over two further and final years (£57,861; £59,627) to run a complex needs Information, Advice and Advocacy Service for people aged 65+ in Westminster, including the salary and on-costs of a 4 dpw Advocacy and Advice Co-ordinator, a 1dpw Wellbeing and Connections Coordinator and a contribution to core costs	£117,488.00	Lily Davies
22082	Archbishop's Park Community Trust	28/06/2024	£51,000 over 3 years (£16,400; £16,970; £17,630) towards a weekly gardening club offering an opportunity to learn and socialise, whilst enhancing and protecting Archbishop's Park, supporting the environment in Central London.	£51,000.00	Chloe Lloyd
23347	ASTON-MANSFIELD	21/06/2024	£2,600 (6.5 days) to provide an eco audit.	£2,600.00	Lydia Parr
21774	Barts Charity	28/06/2024	£100,000 over two years (£50,000 x2) towards expanding a trauma-informed integrated clinical pathway for unaccompanied asylum-seeking young people across Northeast London to improve physical, mental health, and prevent deterioration.	£100,000.00	Hannan Ali
22460	Beating Time	30/05/2024	£249,000 over three years (£67,000; £87,000; £95,000) for the salary of a full-time London Project Lead/Primary Employment Consultant (40hpw) and a contribution towards other associated costs to deliver Inside Job in three prisons in London.	£249,000.00	Kate Halahan
23264	Calthorpe Community Garden	15/05/2024	£2,600 (6.5 days) to provide an eco audit.	£2,600.00	Lydia Parr



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
22947	Children's Discovery Centre East London	05/06/2024	£149,754 over two years (£143,504, £6,250) the access costs of capital improvement work, project management and community consultation events.	£149,754.00	Maria Hughes
23405	City & Hackney Carers Centre	18/06/2024	£101,000 over two further and final years (£49,500, £51,500) towards a 0.4 FTE Advice Coordinator and a 0.6 FTE Information and Advice Officer, as well as associated project and management costs.	£101,000.00	Abi Sommers
23187	Community Development Association for Minority Communities LTD	28/06/2024	£38,160 over 3 years (£12,720; £12,720; £12,720) towards a mental health support service to improve the wellbeing of women from Somali and other African migrant communities in Haringey.	£38,160.00	Chloe Lloyd
23862	Connect: North Korea	13/06/2024	£350,600 over two further years (£175,300, £175,300) towards the continuation of the research project to identify systemic issues facing the North Korean refugee community in London to access healthcare, and to start to design the roadmap for addressing inequities and barriers and bring about meaningful change to equitable access, experience, and outcomes in public health. Funding includes salaries for two FT workers; the Community Health Worker and Community Outreach Worker (Propel-specific) and proportion of CEO and Programme Manager (2.65 FTE in total) and running costs.	£350,600.00	Shegufta Slawther
23863	Connected Routes CIC	13/06/2024	£195,600 over two further years (£95,500, £100,100) towards the development of the Routes to Employment project with contributions	£195,600.00	Shegufta Slawther





ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
			towards the roles of project workers (two at 3dpw each) and other project costs.		
23332	Copleston Centre	28/06/2024	£4,918 to provide an access audit, that includes training for the staff.	£4,918.00	Matthew Robinson
22670	Corinne Burton Memorial Trust	05/06/2024	£67,077 over 3 years (£21,918; £22,356; £22,803;) towards providing art therapy sessions for anxious and depressed cancer patients, medical staff at risk of burnout and the training of new art therapists in cancer care.	£67,077.00	Gerard Darby
23149	Deaf Unity	21/06/2024	£60,000 over three years (20,000 x3) towards the organisation's core costs, restricted to a proportion attributable to activity benefitting Londoners.	£60,000.00	Matthew Robinson
22247	Early Years Cocoon C.I.C	18/06/2024	£81,375 over three years (£28,485, £25,835 and £27,055) towards three part-time freelance positions to strengthen the organisation's early years educational play and other support services.	£81,375.00	Hannan Ali
23920	ETNA Community Centre	14/06/2024	£3,600 (9 days) to provide an eco audit.	£3,600.00	Lydia Parr
22328	Fight for Change Foundation	03/06/2024	£100,000 over two years (£50,000 x 2) to support c.50 ex-gang members from Lambeth and Southwark to manage their traumas, build their capacities to make positive lifestyle choices, and overcome significant challenges.	£100,000.00	Hannan Ali
23262	Forest Gate Community Garden CIO	31/05/2024	£27,900 (£13,000; £14,900) over two further and final years towards two part time-staff members (Coordinator and Lead Gardener).	£27,900.00	Lorna Chung



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
23118	Fulham Reach Boat Club (FRBC)	12/07/2024	£110,000 over three years (£30,000, £35,000, £45,000) towards the 'Boats Not Bars' project, supporting prisoners up to and on release with access to wellbeing and mentoring support alongside training and employment opportunities.	£110,000.00	Anneka Singh
22649	Give Youth A Break	14/06/2024	£76,000 over three years (£24,588, £25,332, £26,080) for Speech & Language Therapy, Art Therapy, Literacy Support, Mentoring, Administration, Resources, Rent and oncots, to provide wraparound therapeutic communication support for disadvantaged Jewish girls in Barnet and Hackney.	£76,000.00	Kate Halahan
23599	GRANT A SMILE CIC	14/06/2024	£121,368 over three years (£38,500, £40,428, £42,440) for 0.9 FTE Psychotherapist salary and supervision costs to provide psychotherapeutic support for households in Westminster where one or more family members are displaying hoarding behaviours.	£121,368.00	Anneka Singh
23477	Greenwich Mencap	28/06/2024	£249,884 over four years (£59,728, £61,520, £63,368, £65,268) to fund the Service Manager's salary (1.0 FTE), some Siblings Support sessions, Events, Resources, Training, Supervision and a contribution towards organisational oncots, to deliver the Greenlights Project, which supports families with children under 11 in the LB Greenwich, displaying challenging behaviour due to learning disabilities.	£249,884.00	Lily Brandhorst
24455	Hayes End Methodist Church	12/07/2024	£3,600 (9 days) to provide an eco audit.	£3,600.00	Lydia Parr



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
24308	Health Equality and Rights Organisation	10/07/2024	£77,500 over three further and final years (£24,800, £25,800, £26,900) towards the 50+ HangOuts project, as well as associated management costs.	£77,500.00	Abi Sommers
22075	Home-Start Barnet	14/06/2024	£226,280 over five years (£50,000, £47,500, £45,125, £42,900, £40,755) to deliver tailored home visits, workshops and group support for vulnerable families in North West London.	£226,280.00	Mitva Shah
24265	Hoxton Trust	21/06/2024	£3,700 (9.25 days) to provide an eco audit.	£3,700.00	Lydia Parr
23736	Hypo Hounds	31/05/2024	£94,400 over 5 years (£17,500, £18,000, £19,000, £19,900, £20,000) for costs to improve digital transformation & on-going developments.	£94,400.00	Stella Brown
23339	Intergenerational Music Making, CIC	30/05/2024	To provide £90,000 over 3 years (year one, £32,000; year two, £30,000; year three, £28,000) towards a targeted 'Harmony in Motion' programme to foster active aging and combat isolation for older people in four London boroughs.	£90,000.00	Lily Davies
24564	Islington/ The Maya Centre	21/06/2024	£194,200 over two further years (£95,500; £98,700) towards the activities of the experts by experience groups, including a Community Organiser (0.8 FTE) and management costs, CEO time, reimbursement, training and wellbeing related costs for women experts	£194,200.00	Nat Jordan
21839	Jewish Family Centre	11/06/2024	£180,000 over five years (£40,000; £38,000; £36,000; £34,000; £32,000) towards the salary and on-costs of two Family Support Workers, to increase the organisation's capacity to support vulnerable children and their families.	£180,000.00	Lily Brandhorst



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
22210	Kahaila Ltd	13/06/2024	£106,540 over three years (£37,340.00 year 1, £31,080.00 year 2, £38,120.00 year 3) towards the 'BREW' barista training programme, providing skills enhancement and employment opportunities for asylum seekers and refugees in London's cafe and hospitality sector.	£106,540.00	Hannan Ali
23363	Kiln Theatre	14/06/2024	£2,950 to provide an access audit.	£2,950.00	Lydia Parr
25538	Learning Disability Network London Limited	30/07/2024	£65,000 over one year towards a 1 FTE Family Support Worker at Kids Can Achieve, as well as associated project and management costs.	£65,000.00	Abi Sommers
24109	Learning Through The Arts CIC	01/07/2024	£86,248 over three further and final years (£27,224, £28,224, £30,800) to provide continuation funding for a 0.5 FTE Project Manager, sessional tutors, materials, marketing, expenses, and on costs for a Creative Wellbeing project.	£86,248.00	Lily Brandhorst
22115	Listen To Act	14/06/2024	£99,120 over 2 years (£49,560; £49,560) (Youth Engagement Manager 1 FTE) towards the training and engagement of young people in patient participation groups to enhance primary care access and health outcomes in diverse communities.	£99,120.00	Gerard Darby
23517	London Emergencies Trust	28/06/2024	£64,040 over five years (£12,062; £12,424; £12,797; £13,181; £13,576) towards general operational costs to maintain London Emergencies Trust.	£64,040.00	Lily Davies
24517	London Funders	19/07/2024	£10,000 over one year towards a joint initiative, led by London Funders, to map the current state	£10,000.00	Lily Davies



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
			of funding for equity and justice infrastructure within London.		
23414	Middlesex Association for the Blind	31/05/2024	£77,850 over three further and final years (£25,950, £25,950, £25,950) for continuation funding to support vulnerable visually impaired older people across Brent and Haringey through home visits and other valued support.	£77,850.00	Gerard Darby
24101	Migration Museum Project (MMP)	06/07/2024	£240,000 over 3 years (3 x £80,000) to support Migration Museum Project's community engagement work ahead of its planned move to a purpose-built site in Aldgate.	£240,000.00	Tim Wilson
24319	Mosaic LGBT+ Young Persons' Trust	09/07/2024	£99,000 over two further years (£49,000; £50,000) towards the costs of 1 FTE Strategic Partnerships Manager and associated project costs	£99,000.00	Nat Jordan
22344	Muslims in Public Policy	14/06/2024	£4,800 over 2 years (£2,400, £2,400) towards delivery of in-person networking events for public policy professionals from under-represented backgrounds in Greater London, with a contribution towards core costs and training.	£4,800.00	Hannan Ali
21939	National Trust Morden Hall Park	28/06/2024	£91,000 over two further and final years (£44,800; £46,200) towards contributions to two Urban Ranger salaries and associated project costs.	£91,000.00	Lorna Chung
20531	National Ugly Mugs (NUM)	09/07/2024	£194,900 over three years (£65,500, £62,500, and £66,900) for one FTE specialist victim support case worker for sex workers based in or 'touring' London along with associated costs and ISVA accreditation.	£194,900.00	Maria Hughes



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
23581	Newham Community Renewal Programme	21/06/2024	£4,400 to provide an eco audit.	£4,400.00	Lydia Parr
23700	North East London Gospel Mission	09/07/2024	£20,500 over two further and final years (£10,200; £10,300) towards the salary of a part-time Project Worker (0.4FTE) to continue to deliver the 'Wise Owls' project promoting health and well-being opportunities for older people.	£20,500.00	Lorna Chung
22092	Noviha UK	28/06/2024	£100,000 over 5 years (£20,000; £20,000; £20,000; £20,000; £20,000) towards building the capacity and sustainability of Noviha UK's older people project, introducing new services for older people to connect with their community.	£100,000.00	Chloe Lloyd
24068	Open City	25/04/2024	£6,340 over one year towards the costs of training 20 young people from under-represented backgrounds as City Curators, including contribution to OCA's staff time, overheads, curatorial pay, and project resources.	£6,340.00	Lily Brandhorst
21904	Outside In Pathways	14/06/2024	£100,000 over three years (£31,700; £33,300; £35,000) towards Steppingstones. Funding will cover a 2.5 days/week Project Co-ordinator, a 2 days/week Support Worker and project overheads.	£100,000.00	Anneka Singh
23196	Paddington Arts	28/06/2024	£150,000 capital funding towards stairs and ramps, lifts, sanitary wear and accessibility handrails and step free access to the roof terrace.	£150,000.00	Lily Davies
23546	Parkside Community Centre	31/05/2024	£2,100 to provide an access audit	£2,100.00	Lara Rufus-Fayemi



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
23400	Pop Arts	14/06/2024	£43,304 over 3 years (£14,000; £14,420; £14,884) to support and expand their music mentoring programmes, empowering young people in Haringey through creative expression, skill development, and improved well-being.	£43,304.00	Gerard Darby
21984	Protection Approaches	14/06/2024	£246,960 over two years (£121,642, £125,318) towards the expansion of a hate crime community outreach and resilience project.	£246,960.00	Lily Brandhorst
22663	Respond	28/06/2024	£232,560 over three years (£75,240, £77,496, £79,824) for 0.75 FTE Psychotherapy Services Manager salary, 0.25 FTE Young People's Therapist salary, Reflective Practice and Clinical Supervision, Materials and Resources and a contribution to oncosts, to deliver a psychotherapy service for adults and young people with autism and/or a learning disability, who have experienced significant trauma.	£232,560.00	Abi Sommers
20119	Safe Passage International	23/08/2024	Funding is recommended for £161,150 over four years (£35,800, £39,250, £42,000, £44,100) towards the legal support and casework and the Young Leaders programme at Safe Passage.	£161,150.00	Maria Hughes
22261	Sense	11/06/2024	£371,000 over five years (£70,000; £72,000; £74,100; £76,300; £78,600) to deliver specialist services not available elsewhere to families, parents, and carers with deafblind children (Multi-Sensory Impairment) to cope, adapt, and thrive.	£371,000.00	Hannan Ali
23559	Showroom Gallery Ltd	15/05/2024	£3,600 (9 days) to provide an eco audit.	£3,600.00	Lydia Parr



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
22894	Spitalfields City Farm	13/06/2024	To provide £136,400 of continuation funding over three further and final years (year one, £47,600; year two £44,800; year three, £44,000) to enable the local community to connect with nature in a city environment and participate in a range of inclusive educational and recreational activities	£136,400.00	Gerard Darby
21916	Sporting Equals	01/07/2024	£489,800 over five years (£94,300; £95,600; £96,900; £98,300; £104,700) towards an organisational development and financial capacity building programme for London's ethnically diverse sport and physical activity organisations.	£489,800.00	Lorna Chung
22631	St Christopher's Hospice	14/06/2024	£100,000 over two further and final years (£50,000 x 2) towards the 'Compassionate Neighbours' initiative providing company and social support for isolated people at the end of life.	£100,000.00	Hannan Ali
23185	St Cuthbert's Church, West Hampstead	18/06/2024	£2,600 (6.5 days) to provide an eco audit.	£2,600.00	Lydia Parr
22574	Tempo Time Credits	06/07/2024	Funding is recommended for a further and final year for Tempo to carry its work under the Infrastructure arm of Bridging Divides for £49,952.	£49,952.00	Maria Hughes
22037	Tender Education and Arts	28/06/2024	A grant of £116,900 over two years (£58,250, £58,650) is recommended towards domestic abuse training for adults working with young people in non-educational settings across London.	£116,900.00	Lily Davies
22660	Thames21	31/05/2024	£4,000 to carry out an eco audit.	£4,000.00	Lydia Parr





ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
22332	The Baytree Centre	11/06/2024	£326,670 over five years (£62,100; £63,240; £65,140; £67,090; £69,100) for a full time Youth Service Director, line management, clinical supervision costs and a contribution to core costs.	£326,670.00	Anneka Singh
21577	The Girls' Network	12/07/2024	£92,732 over three years (£30,000, £30,900, £31,832) to deliver mentoring programmes to girls (aged 14-19) from the most deprived boroughs in London.	£92,732.00	Anneka Singh
23894	The Mary Dolly Foundation	21/06/2024	£49,200 over two further and final years (£24,600, £24,600) for the provision of counselling sessions, clinical supervision and administrative costs for young people in London who have experienced domestic abuse.	£49,200.00	Lily Brandhorst
23093	The Parochial Church Council of the Ecclesiastical Parish of Finchley	23/05/2024	£4766 for an access audit of The Parochial Church Council of the Ecclesiastical Parish of Finchley	£4,766.00	Clara Espinosa
21913	The PCC Of The Ecclesiastical Parish Of St. Saviour	12/07/2024	£100,000 over 1 year towards Environmental capital works bringing the St. Saviours Community Hall back to life so that the whole community can thrive.	£100,000.00	Maria Hughes
23456	The Reanella Trust	31/05/2024	£55,380 over three years (£16,080, £19,170 £20,130) for 12 weeks of 0.6 FTE Psychotherapist costs, three accessible laptops, some organisational overheads, technical support, data analysis, volunteer support and administrative support to enable young people of colour, many of whom with a physical disability, living in poverty in Tower Hamlets, to access	£55,380.00	Lara Rufus-Fayemi



ID	Applying Organisation	Assessment Approved Date	Grant Description	Awarded Amount	Funding Manager
			online counselling, alongside ongoing peer support groups.		
24316	The Triangle Adventure Playground Association	18/06/2024	£3,200 (8 days) to provide an eco audit.	£3,200.00	Lydia Parr
23810	Touretteshero CIC	13/06/2024	£206,700 over two further years (£94,700; £112,000) to continue the development of a model to enable young people to imagine solutions and participate in and influence decision making in Lewisham through creative collaboration and action.	£206,700.00	Nat Jordan
23575	Triangle Arts Trust	21/06/2024	£5,800 to provide an eco audit.	£5,800.00	Lydia Parr
23144	Union Chapel Project	03/06/2024	£150,000 over 12 months to transform Union Chapel's Grade-II-listed Sunday School Hall into an accessible and inclusive state-of-the-art community-led cultural, learning and heritage centre.	£150,000.00	Lydia Parr
24137	Waste Not Want Not Battersea	12/07/2024	£3,700 (9.25 days) to provide an eco audit.	£3,700.00	Lydia Parr
22280	Yad Voezer Day Centre Ltd	28/06/2024	£23,260 over 1 year (£23,260) to pilot an IT educational project teaching essential digital skills empowering Deaf and Disabled adults.	£23,260.00	Gerard Darby
23202	Young Trustees Movement	28/06/2024	£99,500 over 2 years (£53,500, £46,000) towards the Young Trustees of London project to strengthen the voice and leadership of young people on boards of London charities.	£99,500.00	Hannan Ali
<b>TOTAL</b>				<b>£8,480,260.00</b>	

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