

**ASSESSMENT CATEGORY - Improving Londoners' Mental Health****Off Centre****Ref: 11105****Amount requested: £186,600****Adv: John Merivale****Base: Hackney****Benefit: Hackney**

**Purpose of grant request:** For salary and associated costs to increase the Services Director post from part to full time to develop a business model and income generating arm.

**Background**

Off Centre is a long-established young people's counselling and advice service based in central Hackney. It works to promote, preserve and restore the mental health and well-being of young people aged 11 – 25, living, working or studying in Hackney. It sees around 1700 young people each year, including around 600 who receive professional counselling. Off Centre also works on issues such as teenage pregnancy, drug misuse, self-harm, and homelessness.

Off Centre describes its work as both psycho-social and psycho-therapeutic. Its social projects, including sports, cookery workshops, and gardening clubs, are valuable in themselves while also being a route and means of engagement for those who may not be ready for counselling. Its therapeutic projects include one-to-one counselling, group therapy, drama therapy and art therapy – and all of these are provided by qualified and properly-supervised specialists. Off Centre owns its own building which, while somewhat awkward, is also homely and personal and avoids the possible stigma of a more obviously clinical environment.

**Funding History**

The Trust funded Off Centre three times in the 1990s – and more recently in June 2004 with £75,000 over three years for a project called "Young Free and Legal". This was a general and legal advice service to young people in crisis. Reporting on that grant was good.

**Current Application**

This request amounts effectively to support for core costs, while the organisation aims to increase its capacity to meet demand, and moves towards a social enterprise business model to diversify its income. The organisation suffered a 10% drop in commissioned work two years ago, and was successful in gaining a one-off 'Transitions' grant from Government. Off Centre recognises that it will always be largely dependent on grants and commissioned work and wants to ensure that its services will always be free at point-of-delivery to those in need. It

wishes also to secure its future and to supplement its income through alternative streams such as selling counselling to young professionals in the local creative media who can afford to pay; partnering alcohol treatment bodies with couple counselling or alternative therapies; using its expertise to provide training and guidance; encouraging its existing network of supporters in income-generating enterprises; and developing its appeal to Corporates. While some of the outcomes are yet to develop, a schedule of intended outputs has been provided.

Specifically, the application is for funds to double the hours of the Services Director to a full-time position, to support two extra volunteer counsellors and a range of sessional workers. This would increase practical capacity, while also freeing up senior management time for development. While some of this organisation's work may be said to be general and preventative, a very high proportion of the clients are at high risk as regards mental health and Off Centre's specialism is in its therapeutic work. Your officers therefore consider that such a core grant does meet the priorities of your Improving Mental Health programme. In regard to evaluation of effectiveness, Off Centre has recently undergone a Social Return on Investment (SROI) study by Bristol University, which found very good value for money; and it also regularly monitors its work through client feedback and using the well-established 'Clinical Outcomes for Routine Evaluation' (CORE) methodology.

### **Financial Observations**

Off Centre still enjoys a fairly robust funding relationship with its local authority and has grants from other sources including Big Lottery and Comic Relief. Draft accounts to March 2012 indicate a turnover slightly higher than that of 2011, and a surplus of some £17,000. Its reserves policy aims for between three and six months' running costs, and free reserves are within this range at under four months' costs.

### **Officer's Appraisal**

Off centre is an interesting and unusual organisation, offering a highly personalised service coupled with a high level of professionalism. The request is high in relation to your usual awards and bearing in mind the scale of this organisation. In discussion, the applicant has agreed that the costs of sessional workers could reasonably form a bid to another funder – and the absence of this part of the income would not prevent useful work on growing capacity and developing the volunteer counsellors meanwhile. The recommended sum is adjusted in light of this.

### **Recommendation**

**£136,500 over 3 years (£44,000; £45,500; £47,000) towards capacity building and development of mental health services for young people in Hackney.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11105

Date Received:

07/03/2012

Programme  
Area:

03

### 1. About your organisation

Name of organisation applying for grant: <b>Off Centre</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence: <b>25 - 27 Hackney Grove London</b>	
Postcode: <b>E8 3NR</b> Is this your home address? <b>No</b>	
Contact person: <b>Ms Nicola Noone</b>	Position: <b>Assistant Director - Support Services</b>
Phone: <b>0208 986 4016</b>	Fax: <b>0208 150 5657</b>
E-mail: <b>nicola.noone@offcentre.org.uk</b>	
Website: <b>http://www.offcentre.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b> If registered, please give charity number: <b>288275</b> Date organisation established: <b>15/09/1974</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Improving Londoners' Mental Health</b>
Purpose for which funds are requested: (25 words maximum) <b>For salary and associated costs to increase the Services Director post from part to full time to develop a business model and income generating arm.</b>
How much funding is requested? <b>Year 1: £60,556 Year 2: £61,837 Year 3: £64,270 Total: £186,600</b>

### 3. Aims of your organisation

Off Centre works to promote, preserve and restore the mental health and well-being of young people aged 11 -- 25 living working or studying in Hackney. Off Centre provides services to young people who have experienced trauma, emotional distress, discrimination and disadvantage. It has almost 40 years experience of working with vulnerable young people living in one of the most deprived areas in the UK.

Off Centre has developed an expertise in the field of Mental Health, helping young people recover from some very traumatic experiences. The service aims to not only look after young people's emotional well being but also provide practical support, The organisation supports young people through the process of recovery, then helps them positively re engage with their community post recovery. Young people can access a wide spectrum of services tailored to their specific needs

### 4. Main activities of your organisation

Off Centre provides the following services to disadvantage 11 - 25 year olds in the borough of Hackney:

- Psychotherapeutic work: Individual, couple and group Counselling, Art & Drama Therapy covering: deliberate self-harm, suicidal ideation, tier two to three mental health, sexual health, lone parents, young people affected by crime [gangs, guns, knives, victims of], substance & alcohol misuse, aged [under 19]. Delivered by qualified and registered practitioners. Anger Management group: NEET young people. REACH [support for under 16s on Domestic Violence]

Young Men Early Intervention service: gang, gun and knife crime -- victims & perpetrators. Outreach work in local school-loss & bereavement.

- Psychosocial work: Positive Activities, Community engagement, Peer Mentoring, Advocacy, casework in accessing employment / training, housing, and basic benefits advice and sign-posting for legal advice, i.e. immigration, domestic violence, etc. referral point to social care for under 18's under, with a significant number of young people being care leavers and / or those who are involuntarily 'roofless' due to family breakdown.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>3</b>	<b>13</b>	<b>6</b>	<b>25</b>

### 6. How do you support your volunteers?

All volunteers receive a comprehensive induction into the organisation, a training package tailor made to the role and on-going support in the form of monthly supervision. The organisation is also linked into relevant sources to inform on good practice for example Hackney Voluntary Agency.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Owned</b>	

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

**Year: 2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	13,525
Activities for generating funds	3,810
Investment income	50
Income from charitable activities	486,339
Other sources	39
<b>Total Income</b>	<b>503,763</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	455,851
Governance costs	20,938
Cost of generating funds	0
Other	0
<b>Total Expenditure:</b>	<b>476,790</b>
<b>(Deficit)/surplus for the year:</b>	<b>26,973</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	194,147
Investments	0
Net current assets (liabilities)	161,121
Long-term liabilities	0
<b>*Total A:</b>	<b>355,268</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	218,793
Unrestricted funds	136,475
<b>*Total B:</b>	<b>355,268</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**60%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**We have changed our constitution to enable us to work not just in Hackney but throughout England and Wales.**

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	10/04	Ref:	4892	Grant received:	£75,000	OR application rejected?	No
Month/Year:	07/99	Ref:	32	Grant received:	£63,000	OR application rejected?	No
Month/Year:	05/97	Ref:	9718	Grant received:	£25,220	OR application rejected?	No

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2011/12	Year: 2010/11	Year: 2009/10
(i)			
(ii) London Borough Of Hackney	78,406	158,791	181,030
(iii)			
(iv) City & Hackney PCT	138,709	176,726	173,226
(v) Cabinet Office for Civil Society (Transitions Fund)	67,890		
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year:	Year:
Comic Relief	38,622	38,622
Big Lottery	118,858	111,928
Ecominds	29,174	272

## 14. What steps is your organisation taking to reduce its carbon footprint?

The organisation has a print less policy. Staff for example are given training to organize your inbox to make e-mails easier to reference. We use paper from sustainable sources and the printers and photocopier are set to print on both sides of the page. Where possible we go digital with documents, for example electronic signatures being used. Additionally we have an efax account, not using a traditional fax machine significantly reduces paper usage.

All appliances are unplugged when not in use. All computers are set to hibernate after a period of inactivity. All office light bulbs are energy-saving and any appliance purchases are checked for energy efficiency.

All paper products are recycled, we have a shredder so even confidential items can be sent for recycling. Off Centre has a freecycle account, so any items surplus to requirements can be used elsewhere and we can reuse others unwanted items.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Off Centre is seeking to change their model of operation from the traditional charity model to one which incorporates business and commercial thinking. Off Centre has a highly marketable product. We provide a unique combination of therapeutic work, practical support and motivational / community engagement opportunities that have a proven successful track record for moving young people from harmful behaviours onto a positive life trajectory.

We are applying to double the capacity of the Services Director to a full time position, to support the cost of two volunteer counsellors and sessional workers to staff a social enterprise over a three year period. This investment will ensure the long term security of income to deliver a high quality service, specifically for vulnerable children and young people through the development of corporate partnerships and an income generating arm for the organisation.

The Services Director holds the key strategic knowledge, clinical expertise and a vast experience in successful service delivery. Throughout the funding period Off Centre will develop from an organisation solely delivering funded projects into attracting income from corporate sponsorship, marketable products and the development of a social enterprise. Giving the organisation a degree of financial independence, making it more agile, innovative and able to respond effectively to client needs.

In the current economic climate it is increasingly competitive to secure funding for projects. If Charities are to thrive a more diverse income base is required that marries traditional forms of funding with income generation whilst staying true to the organisation's core values. Off Centre will develop a social enterprise that will not only generate income but provide support and work opportunities for disadvantaged young people with Mental Health issues at risk of homelessness and or entering the criminal justice system.

The award would provide direct service capacity by supporting the costs of two counselling placements and sessional workers to run the social enterprise. It will enable young people:

- To receive specialist help and a direct referral pathway into Off Centre's therapeutic service to support improved mental health.
- To be referred from Off Centre's housing / homeless service for young transient people and rough sleepers into the therapeutic service with the opportunity of work experience through the social enterprise to promote their well-being.
- With mental health problems to successfully live independently by providing work experience and training in financial management.

Off Centre provides services throughout Hackney, we are specialists in working with young people with mental Health issues from diverse communities. Last year 83% of our service users were from BME communities, this service will promote access to the most vulnerable. The volunteer counsellors will join a highly experienced team of paid staff and a successful volunteer programme that has a comprehensive training and support programme.

Alongside the development of a social enterprise, our location (just on the edge of the city) makes Off Centre an attractive partner to large organisations looking to discharge their corporate responsibilities by making a difference to over 1000 vulnerable disadvantaged young people. By increasing the Service's Director hours to full time the organisation will have the capacity to project manage and develop this area of work. Not only will this development attract additional income through sponsorship but it will provide service users with the opportunity of being mentored by high achieving business people. All young people accessing the project will be given the opportunity to be involved in the planning of the service.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

The organisation has established monitoring and evaluation systems. Performance is reported on quarterly using: CORE (Clinical Outcomes for Routine Evaluation) which is a widely respected monitoring and evaluation tool for therapeutic work. A case management system complements CORE, it produces both outcome based reports and allows for qualitative analysis, including sample set case studies.

Apart from formal means Off Centre has developed (in collaboration with our peer mentors) social networking (Facebook & Tumblr blog) and other ICT means (eg survey monkey) of monitoring the success of the work we do. We are increasingly, with the peer mentors help, using mediums that are more appealing to young people. Gaining feedback that has never before been available. For example a very powerful way of monitoring and evaluating qualitatively the needs of young people and the success of the work we do is using video blogs. Here is just one example - <http://vimeo.com/28947423>

**17. Beneficiaries**

How many people will benefit from the grant per year?			
<b>940</b>			
In which local authority is your organisation based?			
<b>Hackney</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each)			
<b>Hackney</b>			
At what address will the activity be located?			
<b>Hackney</b>			
What age group will benefit? <b>All children &amp; young people</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British	<b>15</b>	Black - Caribbean	<b>15</b>
White - Irish	<b>3</b>	Black - African	<b>20</b>
White - Other (please describe) Kurdish, Turkish, Jewish, European	<b>13</b>	Black - Other (please describe) Somali	<b>2</b>
Asian - Indian	<b>1</b>	Black - British	<b>12</b>
Asian - Pakistani	<b>2</b>	Chinese	<b>1</b>
Asian - Bangladeshi	<b>2</b>		
Asian - Other (please describe)		Other (please describe) Dual Heritage & Other	<b>14</b>
Open to everyone			
What proportion of the beneficiaries will be disabled people?			
<b>10%</b>			



## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salaries (incl pension)	23,240	24,452	25,700	<b>73,391</b>
Volunteer Expenses	470	485	499	<b>1,454</b>
Sessional Workers	15,750	16,223	16,709	<b>48,682</b>
Travel	235	242	250	<b>727</b>
Training	450	464	477	<b>1,391</b>
Monitoring and Evaluation	1,244	1,281	1,320	<b>3,845</b>
Promotion	2,000	2,060	2,122	<b>6,182</b>
External Supervision	1,170	1,205	1,241	<b>3,616</b>
Materials & Subscriptions	8,600	8,858	9,124	<b>26,582</b>
Management Costs	3,800	3,914	4,031	<b>11,745</b>
Building Costs	658	678	698	<b>2,035</b>
Running Costs	1,566	1,613	1,662	<b>4,841</b>
ICT	1,020	0	0	<b>1,020</b>
Other Capital (mobile phone)	353	363	374	<b>1,090</b>
<b>TOTAL</b>	<b>60,556</b>	<b>61,837</b>	<b>64,207</b>	<b>186,600</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Not Applicable				
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
Not Applicable	
<b>TOTAL</b>	

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
As detailed above				
<b>TOTAL</b>				

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/07/2012</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>As detailed above the purpose of this funding is to diversify the organisations funding base and develop a substantial income generating arm to the organisation, with marketable products such as training, consultancy, a best practice guidance and the creation of a social enterprise.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>Not Applicable</b>

### Declaration on behalf of applicant organisation

I, <u>NICOLA NOONE</u> (your name)
am an authorised representative of <u>OFF CENTRE</u> (your organisation)
within which I am <u>ASSISTANT DIRECTOR &amp; COMPANY SECRETARY</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> Date <u>8<sup>TH</sup> MARCH 2012</u>

### Return the completed form to: **The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Improving Londoners' Mental Health**

**St Peter's Community and Advice Centre**

**Ref: 11298**

**Amount requested: £47,775**

**Adv: Joan Millbank**

**Base: Tower Hamlets**

**Benefit: Tower Hamlets,  
Hackney**

**Purpose of grant request:** To raise awareness of mental health issues experienced by elderly Bangladeshi women living in Tower Hamlets.

**Background**

St Peter's Community and Advice Centre was set up in 1990 and serves a largely Bangladeshi population of north Tower Hamlets. It provides a range of social welfare services including bilingual information and rights advice, elders' lunch club, girls' supplementary education, domestic abuse project. The organisation operates from a purpose-built community centre owned by Tower Hamlets Community Housing Trust; there is a covenant ensuring on-going use by St Peters, albeit on a rolling 5 year lease. Other groups also use the building. Physically based on the borough border, 75% of its users come from Tower Hamlets and the rest from neighbouring Hackney.

The seven trustees are elected bi-annually at the AGM and include young professional people and representatives of users; its treasurer is an accountant. St Peter's has established links with a range of statutory and voluntary organisations, and is a member of the Tower Hamlets Advice Partnership delivering generalist advice.

**Funding History**

St Peter's has applied to the Trust on a number of occasions. In May 1999, a grant of £10,000 contributed toward the centre's work with older people; in November 2003, a grant of £26,000 was awarded for a project undertaking drugs education with young Bangladeshis and in September 2009 a three-year grant was approved to meet the salary costs of an Elders Development and Advice Worker post. These grants have been satisfactorily signed off.

**Current Application**

St Peter's is seeking your support to match fund the cost of employing a part-time Elderly Women's Mental Health Advice and Support Worker, with project costs; Tower Hamlet borough council is contributing £70,395 towards the project over three years. The project focuses on tackling increasing mental health problems experienced by Bangladeshi women aged 65 years and over. Changes in family composition and relationships

are leading to more elderly women living alone in flats and in sheltered accommodation, isolated by language barriers and poverty. St Peter's has also noted an increase in older women experiencing domestic abuse. In consequence older women are presenting with increased levels of stress, anxiety and depression as well as dementia.

The project will undertake outreach, provide home visiting and befriending support, link individual older women in to centre activities, as raising awareness amongst other local providers and policy makers about the particular issues for older Bangladeshi women experiencing low level mental health issues. Up to 100 older women are expected to benefit from the project over three years.

### **Financial Observations**

Audited accounts show income in the year ending March 2012 as £93,510, which has been generated from a wide range of local statutory funds and charitable grants. The reserves policy states that free reserves should be equivalent to six months' expenditure; St Peter's has £50,746 in hand, which is equivalent to 54% in-year expenditure.

The 2012-13 budget shows income of £101,150 of which £99,650 has been secured from a range of commissioned funds and charitable grants. As indicated above Tower Hamlet Adult Commissioning is contributing £70,395 over three years towards the Elders Development and Advice project.

### **Officer's Appraisal**

St Peter's Community and Advice Centre has a strong track record in providing services to Bangladeshi and other communities in Tower Hamlets and to older beneficiaries. This application builds on earlier good work and will provide a community-based way of addressing emerging non-clinical depression and other low level mental health issues for older Bangladeshi women. Intervention should lead to fewer older people experiencing depression and as such this application addresses your programme outcome 'Improving Londoners' Mental Health'.

### **Recommendation**

**£47,700 (3 x £15,900) towards the project costs of raising awareness of mental health issues experienced by elderly Bangladeshi women living in Tower Hamlets.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11298

Date Received:

12/07/2012

Programme  
Area:

03

### 1. About your organisation

Name of organisation applying for grant: <b>St Peter's Community and Advice Centre</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>1 Marian Place London</b>	<p>16 JUL 2012 MH</p>
Postcode: <b>E2 9AX</b> Is this your home address? <b>No</b>	
Contact person: <b>Dr. Khondoker Kamal-Uddin</b>	Position: <b>Principal Development Officer</b>
Phone: <b>020 7739 8024</b>	Fax: <b>020 7729 9115</b>
E-mail: <b>stpetersadvice@fsmail.net</b>	
Website: <b>www.stpetersadvice.org</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1053972</b>	
Date organisation established: <b>01/12/1990</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Improving Londoners' Mental Health</b>
Purpose for which funds are requested: (25 words maximum) <b>To raise awareness of mental health issues experienced by elderly Bangladeshi elderly women living in Tower Hamlets.</b>
How much funding is requested? <b>Year 1: £15,925 Year 2: £15,925 Year 3: £15,925 Total: £47,775</b>

### 3. Aims of your organisation

The Centre was set up by the local community in 1990. It provides support and guidance to disadvantaged and marginalised sections of the community who are excluded in terms of housing, employment, health and education because of lack of access to facilities, isolation and opportunities.

The Charity's Objects are for the benefit of the inhabitants of Tower Hamlets particularly members of the Bangladeshi and other ME Communities but not exclusively:

- To relieve poverty, hardship and distress by the provision of advice on welfare rights, housing, debt, health matters, immigration, interpreting/translating and advocacy as well as their educational and employment needs.
- To advance education and training through the provision of language and classes in other subjects.
- To preserve and protect health through the provision of appropriate services.
- To provide or assist in the provision of facilities for recreation and other leisure time occupations in the interests of social welfare with the object of improving conditions of life.

### 4. Main activities of your organisation

Advice and Information -- Provide drop in advice support on a one one basis on the following areas of law at the CLS General Help Level: Housing, Benefits, Debt, Immigration (OISC - Level 1), Consumer and Utilities, Education, Health Matters. This service is run 4 days a week.

Lunch Club-- Providing a hot cooked lunch to people aged 50 and above - 3 sessions a week.

Girls Youth Peer Education Programme -- Educational, social and leisure activities for girls and young women.

Summer Holiday Playscheme -- providing a variety of educational and leisure activities for children and young people during the summer holiday period.

Girls Supplementary Education and ICT/ Study Support Programme.

Community Gardening Project: Providing environmental education programme and therapeutic support for the young and elderly.

Domestic Abuse & Mental Health Awareness Project - We provide confidential bilingual advice, guidance and counselling support so that vulnerable women know, understand and have the confidence to access supports services for themselves who have been victims of domestic violence

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
01	5	7	10

### 6. How do you support your volunteers?

- (a) We provide supervision support and practical training for the volunteers.
- (b) Provide work experience placement at the organisation's office, different community projects run at the Centre
- (c) Letter of reference for a job.
- (d) We also provide volunteering expenses to volunteers.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented/Leased	Five Years, renewable

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	
Activities for generating funds	37228
Investment income	
Income from charitable activities	56282
Other sources	
<b>Total Income</b>	<b>93510</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	91400
Governance costs	1620
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>93020</b>
<b>(Deficit)/surplus for the year:</b>	<b>490</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	1488
Investments	
Net current assets	49261
Long-term liabilities	
<b>*Total A</b>	<b>50749</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	
Unrestricted funds	50749
<b>*Total B</b>	<b>50749</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
40%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

none

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	2010	Ref:	9858	Grant received:	£0	OR application rejected?	Yes
Month/Year:	2006	Ref:	7433	Grant received:	£61,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) Tower Hamlets Council	31,922	43,142	38,767
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Comic Relief	29,696	17,755
Henry Smith Charity	14,000	0
BBC Children in Need	19,235	13,225
Lloyds TSB Foundation	5,000	0
Wates Foundation	15,000	15,000
Esmee Fairbairn Foundation	19,362	12,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

We make careful use of natural resources e.g. recycling of scrap paper by using used paper again, recycling of ink jet cartridges.

As far as possible we use email for communicating to reduce the amount of paperwork and to reduce the telephone bill and postage.

During the summer days (or when the days are longer) we turn off the lights, the computers switched off while not in use, heating systems turned off time with seasonal weather.

We already apply a no smoking policy (as required by law),

We encourage users not to waste water and more use of public transport rather than cars.



## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

### The Project Aim

Our project focuses on tackling the increasing mental health problems experienced by Bangladeshi elderly women aged 65+ living in Tower Hamlets particularly in areas of depression, anxiety and stress resulting from loneliness, isolation or through being victims of domestic abuse.

### The Need

Through a befriending pilot project that we ran last year and a domestic abuse project that was also run, a large number of female elderly users reported that they were experiencing depression and anxiety attributed as a result of living in isolation from the wider community, experiencing language, social and cultural barriers that prevented their access to services. There was increased levels of stress, anxiety and depression reported by elderly women due to domestic abuse by younger family members that was occurring amongst many Bangladeshi families. We have had elderly parents reporting to us that they were being neglected intentionally or unintentionally. Through family conflicts many of the elderly women are forced to live in sheltered accommodation or on their own for the first time in their lives - away from family and friends.

### Objectives:

To reduce mental health problems experienced by Bangladeshi elderly women - depression, anxiety, stress attributed through isolation, loneliness and domestic abuse.

To reduce the risk that elderly women may experience, face or be vulnerable to it by helping, supporting and guiding elderly women to reduce their tolerance or acceptance of domestic violence and abuse.

To create awareness of issues that relate to elderly women by organising informative events and to break isolation by creating a safe and confidential environment for elderly women to meet up.

To actively work to raise awareness of mental health illness amongst Elderly Women for the purpose of preventing occurrence or re-occurrence by increasing the community involvement and participation of elderly women who have been excluded from the wider community

### Carryout the following activities

To provide independent, impartial advocacy support, raising awareness, imparting knowledge, variety of information on exercising their rights, understanding responsibilities, making important choices, and communicating with others.

To strengthen and promote participation in community activities through volunteering,. To provide training and one to one support that encourages and build the confidence of older people to volunteer.

To provide befriending support to elderly women - with a new direction in life, to open up a range of activities that will lead to increased self-esteem and self confidence.

Befrienders will support elderly women company in their own home and offer companionship and relieve isolation.

### Outcomes:

To reduce the number of reported cases of elderly Bangladeshi women affected by mental health illness particularly depression, anxiety and stress.

To support elderly women to overcome depression, anxiety or stress resulting from domestic abuse.

To enable them to regain control of their lives and successfully managing responsibilities for their home to be able to independently and have the confidence and self-capacity to make positive life changing decisions.

To enable elderly women with mental health illness to know and understand their rights and entitlements - enable to them to make positive life choices and to enable them to lead a more independent and safer life without further threat to their mental health.

To increase elderly women's involvement and participation in the community including increased uptake of local services to enable them to have a better quality of life.

### Track Record

Providing a variety of services to the local community.

Skilled and experienced Trustees from different professional backgrounds - good experience of project delivery management skills.

Good understanding of the needs of the local community with strong user involvement and participation.

Strong links and partnership in the Public and Voluntary Sector

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Attendance: How many beneficiaries attending, how often. Record the number of elderly women reporting further cases of mental health illness or problems.

Individual Personal Monitoring Form: Carrying an assessment of the issues each participants have at the start of the project (to be able to collect basic baseline data -- e.g. details of lifestyles, family, level of uptake of services, personal health matters).

The elderly Women report a reduction of mental health problems from feedback-- e.g. they seem happier, more active involvement in activities at the Centre or other organisations locally, women experiencing less isolation, making more friends, stronger family relationships.

The feedback from local agencies which we will be working with.

Feedback from the participants on how the support and activities have benefited them.

An end of year evaluation to compare how the health has changed or improved as a result of their participation in the project.

**17. Beneficiaries**

How many people will benefit from the grant per year?			
<b>60</b>			
In which local authority is your organisation based?			
<b>Tower Hamlets</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each)			
<b>Tower Hamlets</b>			
At what address will the activity be located?			
<b>St. Peter's North Community Centre, 1. Marian Place, London E2 9AX</b>			
What age group will benefit? <b>over 65</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	
White - Irish		Black - African	<b>10</b>
White - Other (please describe)		Black - Other (please describe)	
Eastern European	<b>10</b>		
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi	<b>80</b>		
Asian - Other (please describe)		Other (please describe)	
Open to everyone			
What proportion of the beneficiaries will be disabled people?			
<b>20%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary Costs - Elderly Women's Mental Health Worker	15,015	15,015	15,015	45,045
Employers Ni Costs	910	910	910	2,730
Sessional Staffing Costs	8,100	8,100	8,100	24,300
Volunteer Expenses (Befrienders Costs)	2,250	2,250	2,250	6,750
Beneficiary Welfare Support Costs	2,700	2,900	3,100	8,700
Publicity and Promotion	2,500	2,500	2,500	7,500
Event/Themed Workshop Costs	2,000	2,100	2,200	6,300
Overheads Contribution Costs	2,450	2,610	2,780	7,840
Premises Costs	3,000	3,000	3,000	9,000
<b>TOTAL</b>	<b>38,925</b>	<b>39,385</b>	<b>39,855</b>	<b>118,165</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Tower Hamlets Council - Adults Health and Well Being	23,000	23,465	23,930	70,395
<b>TOTAL</b>	<b>23,000</b>	<b>23,465</b>	<b>23,930</b>	<b>70,395</b>

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust

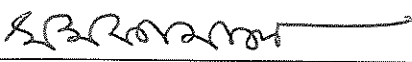
How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary Costs - Elderly Women's Mental Health Worker	15,015	15,015	15,015	45,045
Employers NI Costs	910	910	910	2,730
	<b>15,925</b>	<b>15,925</b>	<b>15,925</b>	<b>47,775</b>
<b>TOTAL</b>	<b>15,925</b>	<b>15,925</b>	<b>15,925</b>	<b>47,775</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/11/2012</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>The Council to continue to support the project.</b> <b>Identify alternative funding sources - other charities and trusts that are willing to support.</b> <b>More use of volunteers to do befriending work.</b> <b>Split the activities into smaller individual services.</b> <b>Further training of staff and volunteers.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>Not Required</b>

### Declaration on behalf of applicant organisation

I, <u>DR. KHONDOKER KAMALUDDIN</u> (your name)
am an authorised representative of <u>ST. PETER COMMUNITY &amp; ADVICE CENTRE</u> (your organisation)
within which I am <u>PRINCIPAL DEVELOPMENT OFFICER/MANAGER</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> Date <u>13/07/12</u>

### Return the completed form to: **The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Improving Londoners' Mental Health**

**Mind in Tower Hamlets and Newham**

**Ref: 11139**

**Amount requested: £124,391**

**Adv: J Grieve Combes**

**Base: Tower Hamlets**

**Benefit: Tower Hamlets**

**Purpose of grant request:** Advocacy and support in accessing mental health well-being activities for 270 older people with depression in Tower Hamlets, over three years.

**Background**

Mind in Tower Hamlets and Newham (MITHN) is an independent charity affiliated to Mind. It supports 2000 people a year through a range of services including advocacy, welfare rights, health promotion, counselling, and activity groups in art, music therapy, bicycle maintenance and yoga. Impressively, 80% of clients are not re-admitted to hospital. The charity has received accreditation from the British Association for Counselling and Psychotherapy and is currently running a clinical pathway project in Newham trialling alternative talking therapy models.

Your officer visited MITHN's busy Tower Hamlets offices (it also has offices in Newham and Mile End Hospital) where a number of activities were in progress including music therapy, counselling sessions and bicycle maintenance. MITHN enjoys strong support from 50 volunteers: its counselling service is run almost entirely by trained volunteers, it has several user-led groups and other volunteers help in the office and at events.

**Funding History**

An application from MITHN was declined in 2004 due to its similarity to a grant approved in 2003 under the Diana Fund rescue, to which it made no reference. In 1997 you awarded a three-year grant for an employment project for mentally ill people which was signed off long ago.

**Current Application**

The request before you is for a full time Older Person's Advocate to deliver a mix of advocacy and support to help 270 older people with depression and other common mental health concerns to feel more in control of their lives, less isolated, more aware of their rights and able to understand the services available to them. The advocate would provide support on issues such as health, housing, finance, benefits and care provision and signposting to appropriate local healthy activities such as lunch clubs, exercise classes and community groups (including St Hilda's East Community Centre which you currently fund). They will also train

and support 15 'peer advocates', drawn from service users and their friends and family, who will provide one-to-one support and help older people access and engage with local activities.

Support will be delivered in a range of settings including people's homes, day centres and Mile End hospital. Good links are already in place with NHS services and Age UK Tower Hamlets. By working in community settings, the project aims to raise awareness and reduce stigma around depression and mental health issues, especially with those who may not have visited their GP for support.

MITHN has a track record in advocacy and provides inpatient and community services as well as a specialist adolescent advocate. Current services have however identified a gap in provision for older people, for whom there is no statutory requirement to provide specialist advocacy unless they are detained under the Mental Health Act.

### **Financial Observations**

MITHN's latest audited accounts are from March 2012 and show an overall surplus of £35,960 which represents 2.6% of their turnover of £1,362,966, although unrestricted funds showed a very small deficit. The 2012/13 budget shows a breakeven position. MITHN's reserves policy is to hold 3 months' worth of running costs in free unrestricted reserves which in 2011/12 equated to £331,572. At 31<sup>st</sup> March 2012 free unrestricted reserves (excluding designated funds) stood at £156,766, below the target but not of undue concern.

### **Officer's Appraisal**

The Older Person's Advocacy Project fills a gap in existing services to help older people with depression take control of their own lives. By training peer advocates, the project will additionally build the skills and confidence of 15 older people and their friends and family and will provide the project with some sustainability after funding.

### **Recommendation**

**£124,000 over three years (£41,000; £41,000; £42,000) towards the salary of a full-time Older Person's Advocate and running costs of a project for older people with depression and mental health issues in Tower Hamlets.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11139

Date Received:

29/03/2012

Programme  
Area:

03

### 1. About your organisation

Name of organisation applying for grant: <b>Mind in Tower Hamlets and Newham</b>	
If the organisation is part of a larger organisation, what is its name? <b>Independent charity affiliated to Mind</b>	
Address for correspondence: <b>Open House 13 Whitethorn Street London</b>	
Postcode: <b>E3 4DA</b> Is this your home address? <b>No</b>	
Contact person: <b>Mrs Michelle Kabia</b>	Position: <b>Director</b>
Phone: <b>020 7510 4241</b>	Fax: <b>020 7537 7944</b>
E-mail: <b>michelle.kabia@mithn.org.uk</b>	
Website: <b>http://www.mithn.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1006927</b>	
Date organisation established: <b>18/09/1991</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Improving Londoners' Mental Health</b>
Purpose for which funds are requested: (25 words maximum) <b>Advocacy and support in accessing mental health well-being activities for 270 older people with depression in Tower Hamlets, over three years.</b>
How much funding is requested? <b>Year 1: £41,117 Year 2: £41,225 Year 3: £42,049 Total: £124,391</b>

### 3. Aims of your organisation

Mind in Tower Hamlets and Newham aims are as follows:

- to promote the preservation of mental health;
- assist in relieving and rehabilitating persons suffering from mental disorder;
- to support those experiencing emotional or mental distress;
- to work in the boroughs of Tower Hamlets and Newham; and
- to work in accordance with the aims and objects of National Mind.

### 4. Main activities of your organisation

We provide a range of community-based services, which encourage independence, enabling adults with mental health issues to be active participants in the wider community. Services include advocacy, welfare rights, health promotion and counselling. We also run activity groups in art, music therapy, wood work and bicycle maintenance and community engagement groups.

We provide mental health support services for the whole community, with special regard for service users from the Black, Asian and Minority Ethnic Communities (BAMER Communities). These include Bengali, Somali and African and Caribbean communities who are over represented within Tower Hamlets.

We support approximately 2,000 people a year, of which 80% are not re-admitted to hospital. Our services, provided by 38 staff, operate during normal and unsocial hours. Our 50 volunteers, many of whom are services users, are involved in service delivery and developing new services.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>18</b>	<b>20</b>	<b>10</b>	<b>50</b>

### 6. How do you support your volunteers?

All volunteer roles are documented and covered by our volunteer policy. Volunteers are trained and CRB-checked prior to taking up their roles. Volunteers are supervised in their roles by line management. Personal development is reviewed with the Volunteer Co-ordinator quarterly and training provided as required.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Leased</b>	<b>24 years</b>



## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	1,449
Activities for generating funds	
Investment income	260
Income from charitable activities	1,361,207
Other sources	
<b>Total Income</b>	<b>1,362,966</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	1,299,950
Governance costs	27,756
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>1,327,006</b>
<b>(Deficit)/surplus for the year:</b>	<b>35,960</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	474,124
Investments	
Net current assets	576,945
Long-term liabilities	
<b>*Total A</b>	<b>1,051,069</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	613,739
Unrestricted funds	437,330
<b>*Total B</b>	<b>1,051,069</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
85.86

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:			
Month/Year: 12/2004	Ref: 6090	Grant received:	OR application <u>rejected?</u> JGC
Month/Year: 08/2003	Ref: 4171	Grant received: £46,127 (Diana Fund rescue)	OR application rejected? JGC
Month/Year: 06/1997	Ref: 98-169	Grant received: £30000	OR application rejected? JGC

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009/10	Year: 2010/11	Year: 2011/12
(i)			
(ii) Tower Hamlets	570,708	570,708	557,743
Newham	0	0	0
(iii) Tower Hamlets	18,000	18,000	18,000
(iv) Newham	130,000	160,000	130,000
Tower Hamlets	356,289	356,289	356,276
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010/11	Year: 2011/12
Henry Smith	38,000	38,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

Our Environmental Policy supports the principles of recycling and energy efficiency. Key practices include:

- Reviewing energy consumption, through optimal settings on radiator thermostats, use of energy-saving light bulbs and encouraging staff to turn lights and equipment off when not in use.
- Monitoring the use of water; turning off taps, fast repair of leaky fittings and washing up in bulk.
- For printed matter we promote the use of recycled paper, printing on both sides of the paper and recycling of printer cartridges.
- Staff are also encouraged to use electronic media rather than print wherever possible.
- We have strict procedures for storage and handling of hazardous products.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

### NEED

#### 1. Population

- a) There are over 18,000 people over the age of 65 in Tower Hamlets (Tower Hamlets Partnership, 2009).
- b) 2,075 of these were on GP depression registers (2008). Many others go untreated. The POPPI system estimates about 2,700 will have depression.

#### 2. Risk level

Isolation and deprivation increase the risk of depression for older people in Tower Hamlets:

- a) 44 to 55% live alone; 66% of whom have no access to transport
- b) Across the borough, 50% live below the poverty line
- c) Older people are more heavily represented in the most deprived wards; 92% of older people in Whitechapel are income deprived, 83% in St Dunstan and Stepney Green. (Tower Hamlets Over 65 Needs Assessment, 2008)

3. Our advocacy service has identified a strong demand for advocacy and support services for older people in the area.

### DELIVERY

1. One full-time Older Person's Advocate will support 90 people aged 65+ each year; 270 people supported over the life of the project.
2. Referrals will come from local GP practices, social services, Community Mental health services, older people services and other Mind services.
3. Each older person will be offered:
  - a) Advocacy Services to resolve issues, impacting the person's ability to take control of their life; e.g. health, housing, finance, benefits issues.
  - b) Signposting to Well-being Services, to support the older person access healthy activities, which are available in the community. Activities will take into account individuals' activity levels, interests and cultural needs.
4. We will train up 15 "Peer Advocates" to support older people with depression in the community.
5. A record of each person's contact and case management will be kept on file and issues which need to be followed up will be signposted to an appropriate service.
6. Services will be provided at MITHN premises and in the community.

### AIMS

1. 216 older people with depression and mental health issues will feel better informed and more in control of their lives, as a result of receiving advocacy services by the end of the project.
2. 216 older people with depression and mental health issues will feel less isolated, more aware of their rights and understand the range of services available to them.
3. By the end of the project 15 people will be trained as Peer Advocates.
4. Peer Advocates will feel able to continue the well-being programme beyond the end of the grant.

### WHY US

1. 28 years experience delivering mental health services to over 2,000 people/year in Tower Hamlets and Newham.
2. An established presence in the area, with good relationships with local statutory/3rd sector providers.
3. Established advocacy services; including IMHA, Inclusive Advocacy and peer advocacy programmes.
4. Unique in providing specific services to minority ethnic groups.

### PRIORITY AREA

This project directly tackles depression amongst older people in two ways:

- Advocacy services will support individuals to deal with the issues which keep people isolated and prevent them being in control of their lives
- Direct signposting to services enabling greater access health/well-being services will enable older people to make positive changes in their lives.

### GOOD PRACTICE

1. People with 'lived experience' of mental illness develop/deliver our services; 2 are on our Executive Committee, 14 are staff, and 28 are volunteers.
2. Our staff, management, volunteers and service-users reflects the multi-ethnic community in which we operate.
3. We have 50 volunteers: eg. counsellors, advisers, facilitators, therapists and administrators. Some have become employees. All roles are documented, supervised and governed by our volunteer policy.
4. We are reducing our carbon footprint by using recycled paper, duplex printing, maximising electronic media, and energy-saving practices.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Our outcomes and the programme outcome will be recorded in the Project Plan. Project activities and milestones will be mapped to these.

The Older Person's Advocate will report project progress to the Advocacy Manager who will report to the Senior Management Team monthly, and to the Trust as required.

We will consult with referring partners, local service providers (statutory and third sector) and peer advocates to maintain records of beneficiaries' condition and progress.

We will record the contact and outcome of contact on clients' case management notes.

We will collect data from service users via pre and post questionnaires, and through feedback workshops. Key learning will be reported every six months and shared with all stakeholders.

**17. Beneficiaries**

How many people will benefit from the grant per year?

**270**

In which local authority is your organisation based?

**Tower Hamlets**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**Tower Hamlets**

At what address will the activity be located?

**Whitehorn Street, Tower Hamlets; and across Tower Hamlets.**

What age group will benefit? **over 60**

What will the ethnic grouping(s) of the beneficiaries be?

	<b>%</b>		<b>%</b>
White - British	<b>30</b>	Black - Caribbean	<b>10</b>
White - Irish	<b>5</b>	Black - African	<b>10</b>
White - Other (please describe)		Black - Other (please describe)	
European	<b>5</b>	Somali	<b>10</b>
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi	<b>30</b>		
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?

**30%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Older Person's Advocate: salary, national insurance and pension	31,456	32,085	32,727	<b>96,268</b>
Recruitment	700	0	0	<b>700</b>
Staff travel	100	102	104	<b>306</b>
Volunteer travel expenses	500	510	520	<b>1,530</b>
Volunteer subsistence	1,248	1,273	1,298	<b>3,819</b>
Phone and mobile phone	740	755	770	<b>2,265</b>
Project share of accommodation costs & utilities	1,147	1,170	1,193	<b>3,510</b>
Project share of IT costs and stationery/printing	701	715	729	<b>2,145</b>
Central Management costs @10.3%	4,525	4,615	4,708	<b>13,848</b>
Management and Supervision at 3 hours	3,341	3,408	3,476	<b>10,225</b>
<b>TOTAL</b>	<b>44,458</b>	<b>44,633</b>	<b>45,525</b>	<b>134,616</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Mind in Tower Hamlets and Newham - Management and Supervision costs	3,341	3,408	3,476	<b>10,225</b>
<b>TOTAL</b>	<b>3,341</b>	<b>3,408</b>	<b>3,476</b>	<b>10,225</b>

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Older Person's Advocate: salary, national insurance and pension	31,456	32,085	32,727	<b>96,268</b>
Recruitment	700	0	0	<b>700</b>
Staff travel	100	102	104	<b>306</b>
Volunteer travel expenses	500	510	520	<b>1,530</b>
Volunteer subsistence	1,248	1,273	1,298	<b>3,819</b>
Phone and mobile phone	740	754.8	769.9	<b>2,264.7</b>
Project share of accommodation costs & utilities	1,147	1,170	1,193	<b>3,510.3</b>
Project share of IT costs and stationery/printing	701	715	729.3	<b>2,145.3</b>
Central Management costs @10.3%	4,525	4,615	4,708	<b>13,848</b>
<b>TOTAL</b>	<b>41,117</b>	<b>41,225</b>	<b>42,049</b>	<b>124,391</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>26/06/2012</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>15 Peer Advocates will in place by the end of the project. They will provide some sustainability for health/well-being activities for older people with depression.</b>  <b>Funding for advocacy services will be addressed through applications to trusts and foundations, and any new statutory sources. Applications will be submitted by the end of Year 2.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>Not applicable</b>

### Declaration on behalf of applicant organisation

I, <u>Michelle Kabia</u> (your name)
am an authorised representative of
<u>Mind in Tower Hamlets and Newham</u> (your organisation)
within which I am <u>the Director</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> Date <u>14/5/12</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

**Please**

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** - if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated

**ASSESSMENT CATEGORY - London's Environment**

**Froglife Trust**

**Ref: 11216**

**Amount requested: £88,131**

**Adv: Ciaran Rafferty**

**Base: Outside London**

**Benefit: London-wide**

**Purpose of grant request:** Dragon Finder is a London wide conservation project incorporating habitat work, wildlife workshops, exhibitions, swimming pool conversions, dragon finder days, wildlife app & website.

**Background**

The Froglife Trust is a national charity which has recently celebrated its 10<sup>th</sup> anniversary as a registered charity. Its head office is in Peterborough though it does have access to office facilities in west London to support its work in the Capital. Its mission is to support the conservation of amphibians and reptiles – frogs, toads, newts, snakes and lizards – and saving the habitats they depend on. It actively encourages people who are not usually involved in conservation and concentrates on “on the ground” action which directly benefits amphibians (eg through care of habitats). It has been particularly successful over the years in delivering environmental education programmes (some of which were funded by your Committee) and in incorporating new audiences – one such scheme, funded by you, which used young offenders to improve habitats in London.

**Funding History**

The City Bridge Trust has a long history of supporting Froglife, all of which was successfully monitored. The first grant was awarded in early 2000 (£90,000 over two years, followed in 2002 by a third year's support of £40,000) for the London Pond Doctor project. In 2004 you then granted £96,000 over two years for the project with young offenders referred to earlier. Most recently was a grant of £98,600 over three years, awarded in November 2007, to support the creation and maintenance of new habitats across London.

**Current Application**

This proposal has several components all of which fall under the general banner of environmental education. These are:

- training for allotment holders across 24 boroughs so that they can improve their sites for wildlife
- mobilising volunteers to create and restore habitats in 26 boroughs (including a project working with people with poor mental health)
- education and craft sessions in 8 boroughs for visiting school groups

- Swimming with Dragons – an innovative scheme to run 16 family events where 4 swimming pools will be converted into a pond scene using floating pond creatures so that younger children and their families can learn about amphibians in a fun environment
- Dragon Days – 64 open events which will involve storytelling, pond dipping, wildlife walks, games and craft activities
- an audio-visual atlas (or App) which will consist of a free downloadable species guide and will also include regularly updated information on the distribution of the species across London.

### **Financial Observations**

Audited accounts for 2011/12 have been provided and which show an overall surplus of £19,344 which equates to 2.7% of turnover. Free available reserves amount to £65,077 which equates to 3.5 months' unrestricted expenditure. The reserves policy indicates a desire to hold 6 months' worth though the budget for the current financial year is on track to meet its income target which, if realised, should lead to a surplus which would bring the level of free reserves closer to the expressed target.

### **Officer's Appraisal**

Froglife are experts at what they do and their work in London over the years (much of it supported by your Committee) has been crucial in developing and preserving habitats for amphibians. This project will continue that in some of its components but will also introduce new audiences to environmental conservation and will use exciting new concepts such as the Swimming with Dragons events to encourage families and young children to develop their interest in London's wildlife.

This is a substantial project in its totality as can be deduced from the costings shown at Q18 on the application form. Funding has recently been secured from the Heritage Lottery at a total value of £472,000 over 4 years making the scheme now feasible. (That bid involved a thorough and comprehensive assessment of the proposed outputs and outcomes of the scheme, which the Heritage Lottery Fund concluded were robust.)

The grant recommended is lesser in year 1 than that requested as the budget includes a considerable sum for translating various materials into a range of languages, which officers do not deem as being necessary. This has been explained to the organisation.

### **Recommendation**

**£77,000 over three years (£35,000; £21,000; £21,000) towards the costs of the Dragon Finder project, including a p/t (3dpw) Project Assistant.**





# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11216

Date Received:

23/05/2012

Programme  
Area:

04

### 1. About your organisation

Name of organisation applying for grant: <b>The Froglife Trust</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>2a Flag Business Exchange Vicarage Road Peterborough, Cambridgeshire</b>	
Postcode: <b>PE1 5TX</b> Is this your home address? <b>No</b>	
Contact person: <b>Miss Kathy Wormald</b>	Position: <b>Chief Executive Officer</b>
Phone: <b>01733 558844</b>	Fax:
E-mail: <b>kathywormald@froglife.org</b>	
Website: <b>http://www.froglife.org</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1093372</b>	
Date organisation established: <b>27/02/2002</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>London's Environment</b>
Purpose for which funds are requested: (25 words maximum) <b>Dragon Finder is a London wide conservation project incorporating habitat work, wildlife workshops, exhibitions, swimming pool conversions, dragon finder days, wildlife app &amp; website.</b>
How much funding is requested? <b>Year 1: £46,029 Year 2: £21,271 Year 3: £20,831 Total: £88,131</b>

### 3. Aims of your organisation

Froglife's vision is a world in which reptile and amphibian population are flourishing as part of healthy ecosystems. In order to achieve this we use practical conservation, education and communication and everyone is invited to join Froglife in achieving our vision and mission. Froglife works inclusively but actively encourages those that are not usually involved in conservation. Froglife's work is delivered through an education, conservation and communication team, and all of our work focuses on 'on the ground' action directly benefiting reptiles and amphibians and other associated aquatic species. Our overarching aim is to take individuals on a wildlife journey, fostering a passion not only for the species that we represent but for the whole of the natural environment. We aim to leave behind a legacy of improved and appreciated wildlife spaces.

### 4. Main activities of your organisation

London Living Waters: 2008-2012 -34 ponds created & 24 restored; trained 1,260 volunteers; 5 employed within the sector; surveyed 201 ponds; a total of 3,226 people directly took part in events; worked in 21 boroughs.  
 Cambridgeshire Living Waters: 2008-2011-12 ponds created & 25 restored; 70 volunteers trained & surveyed 280 ponds.  
 Glasgow & North Lanarkshire Living Waters: 2009-2014 - to date created & restored 51 ponds; over 300 volunteers trained; surveyed 26 sites; worked closely with 21 schools; 38 events hosted with approx 2,000 people getting directly involved.  
 Toads on Roads: 2010/2011 - a record 73,874 toads rescued.  
 EU Toads on Roads workshop: 2012 - hosted in Peterborough by Froglife with attendance from 12 EU countries resulting in a European Network.  
 Education Programme: 2011-2014: to date worked with 2,048 young people; 80 individuals not in employment, education or training (13 adults with learning disabilities; 79 unemployed; 73 socially deprived); 9 reminiscence sessions with 1,252 participants; 8 major Froglife events; 4 individuals gain employment; 2,448 community service hours spent on conservation projects;  
 228 young offenders work with Froglife.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>14</b>	<b>1</b>	<b>7</b>	<b>360</b>

### 6. How do you support your volunteers?

Supported by Project Officers and also our Public Engagement Officer. We have various procedures & policies to protect our volunteers and we are in the process of developing a volunteer hand book to draw it all together and provide a single point of reference.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Leased</b>	<b>July12 will be renewed</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	38,726
Activities for generating funds	196,285
Investment income	1
Income from charitable activities	479,348
Other sources	9,504
<b>Total Income</b>	<b>723,864</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	560,738
Governance costs	3,200
Cost of generating funds	140,582
Other	
<b>Total Expenditure</b>	<b>704,520</b>
<b>(Deficit)/surplus for the year:</b>	<b>19,344</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	6,561
Investments	
Net current assets	65,077
Long-term liabilities	
<b>*Total A</b>	<b>71,638</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	
Unrestricted funds	71,638
<b>*Total B</b>	<b>71,638</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
5%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:							
Month/Year:	Oct07	Ref:	8337	Grant received:	£98,600	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	
Month/Year:		Ref:		Grant received:		OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust)**(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v) Natural England	4,664	66,291	49,778
(vi) Glasgow City Council Peterborough City Council Youth Offending Service CEFAS	33,773	47,885 2,500	30,000 38,000

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year:	Year:
Tudor Trust	20,000	20,000
Heritage Lottery Fund	69,800	52,645
BBC Children in Need	29,549	34,197
SITA Trust	42,207	58,589
Cory Environmental Trust in Britain	25,525	21,094
PLEASE SEE ATTACHED FOR OTHER LARGER DONORS * <i>on file</i>		

## 14. What steps is your organisation taking to reduce its carbon footprint?

Froglife operates a cycle to work scheme whereby employees can purchase discounted bikes. All staff must use public transport whenever possible. As much as possible we operate a paper free office. We use recycled/re-used goods as much as possible, this includes project materials & equipment. The office is kept well insulated reducing energy costs and lights are only used when necessary. All electrical items are turned off at the mains when the office is vacated.

The nature of our work is beneficial for carbon offsetting, for example: within urban environments plants filter pollutants and absorb carbon dioxide from the air; aquatic habitats and plants help stabilise high temperatures brought about by heat generated by buildings and vehicles; and vegetation and soft ground can help dampen noise levels and reduce the risk of flooding.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

To conserve the UK's amphibian and reptile species it is crucial that we have accurate data. Greater London Greenspace Information (GIGL) has expressed concerns about the paucity of data. This paucity reflects a general lack of knowledge and appreciation for these species. This project will increase public awareness of the species and generate data. The data gathered will be submitted to GIGL and used to inform habitat management practices and planning policy.

The project seeks to reach as many people as possible and will operate in all London boroughs, with a comprehensive activity plan.

**Wildlife workshops:** A training course for allotment holders. Total of 40 workshops with 50 allotment sites in 24 boroughs.

**Practical Habitat work:** Habitat work on 49 and surveys on 24 sites reaching 26 boroughs. A target to enlist 392 volunteers. Additionally Youth offending Community Service projects will be delivered in 6 boroughs and practical projects at Sydenham Garden for people with mental ill health.

**Life Under the Surface Exhibitions:** A schools project at 8 venues from 8 boroughs to provide education and craft sessions. Involving 140 schools, 2,800 pupils and 490 families. To educate pupils about the importance of biodiversity. Craft sessions models will form a Life under the Surface exhibit for each venue. Froglife carried out a similar project in Peterborough winning first prize in National Science and Engineering Week as the best scientific exhibit.

**Swimming with Dragons:** Conversion of 4 swimming pools into pond scenes using props. Targeting family sessions, such as searching for submerged newt eggs and tadpole races. A total of 16 sessions.

**Dragon Days:** 64 open days involving 6,400 participants. Activities to include reminiscence, storytelling, pond dipping, wildlife walks, games, crafts.

**Audio-visual Living Atlas:** A free downloadable Smartphone app and a website to track changes to the dataset.

The project will work with over 100 organisations at over 80 venues.

### Objectives

1. Increase the dataset in London
2. Carry out direct habitat work to improve habitat provision
3. Deliver a fun and informative events programme to increase appreciation of the species and biodiversity generally
4. Increase the number of volunteers in London through the provision of training workshops

### Why Froglife

Previous London work has informed the development of this project. In the 1980s Froglife carried out a London wide Great Crested Newt survey and recently these sites have been revisited to establish current status. Conclusions inform the habitat programme.

In 2003 Froglife conducted species surveys on London allotments and this informed the questionnaire that was circulated to allotment holders as part of the Dragon Finder development phase. 86% said they were interested in attending a workshop.

The London Living Water programme from 2008-2012 working in 12 boroughs has identified habitat work and has highlighted a great need for species identification and habitat training, a need to increase and support volunteer networks and an enormous demand for more events and activities.

### CBT priorities

All activities are designed to raise awareness of the issues affecting the nature and quality of London's environment & towards enhancing London's biodiversity. Most importantly it empowers people to take action, particularly through on the ground habitat work and becoming an active volunteer. The project provides a positive message of action rather than the constant bombardment of negative messages.

Habitat action will have a direct impact on reducing London's carbon footprint. Within urban environments plants filter pollutants and absorb carbon dioxide from the air; aquatic habitats and plants help stabilise high temperatures brought about by heat generated by buildings and vehicles; and vegetation and soft ground can help dampen noise levels and reduce the risk of flooding.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Monitoring and evaluation will be carried out in two stages: formative & summative.  
 Formative evaluations: Feedback forms, Conversations and interviews, Observations  
 Post-activity feedback: E-mails, letters, phone calls  
 Specific activity evaluations:  
 Feedback tokens:  
 Website: Problems with the website will be monitored through e-mails sent to the Webmaster.  
 Smartphone app: Evaluation of the app will be based on star ratings and reviews on app download stores  
 Quiz: We will use quizzes to assess how much participants have learnt as a result of the activity.  
 Site visits: Post habitat work visits to assess the sites  
 Summative evaluation: Biodiversity surveys, Participant numbers, Species records, Photos  
 Recording: Interviews at reminiscence sessions-both voice and photographic  
 Targets have been set for each activity and all activities will be monitored and evaluated against achievement of the targets. Ultimately the project will be evaluated through increased number of species and habitat records submitted to GIGL.

**17. Beneficiaries**

How many people will benefit from the grant per year?

**36867**

In which local authority is your organisation based?

**Outside London**

Which borough(s) of Greater London will benefit from this grant?  
 (if more than one, please give % for each)

**All boroughs**

At what address will the activity be located?

**All boroughs but office will be located in Acton**

What age group will benefit? **All**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British	<b>57</b>	Black - Caribbean	<b>7</b>
White - Irish	<b>6</b>	Black - African	<b>8</b>
White - Other (please describe) European/American/Australian/African	<b>12</b>	Black - Other (please describe)	
Asian - Indian	<b>1</b>	Black - British	<b>6</b>
Asian - Pakistani	<b>1</b>	Chinese	<b>1</b>
Asian - Bangladeshi	<b>1</b>		
Asian - Other (please describe)		Other (please describe)	
			Open to everyone

What proportion of the beneficiaries will be disabled people?

**10%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff costs: salaries/training/CRB checks etc	96,752	95,676	95,676	288,104
Repair & conservation work: habitat creation/restoration	37,238	37,238	37,238	111,714
Equipment: computer/photography	1,957			1,957
Professional fees: Public liability/prof indemnity	912	912	912	2,736
Surveyors fees: habitat surveys		3,368	3,368	6,736
Staff & volunteer travel & expenses	10,110	10,110	10,110	30,330
Equipment & materials: Wildlife workshops;Swimming with Dragons; Dragon Days; Audio Visual Atlas; Life Under the Surface	36,526	0	0	36,526
Promotional materials & translations	28,640	0	0	28,640
Event costs: venue hire/transportation of exhibitions	2,462	2,212	1,712	6,386
Reminiscence costs: memory seats/reminiscence boxes	1,679	0	0	1,679
Professional fees: website/App identification keys/GIGL	6,226	1,667	1,667	9,560
Management/administration/overheads	19,555	19,555	19,555	58,665
Evaluation	0	0	514	514
Volunteer time	18,650	18,650	18,650	55,950
<b>TOTAL</b>	<b>260,707</b>	<b>189,388</b>	<b>189,402</b>	<b>639,497</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Volunteer time	18,650	18,650	18,650	55,950
Cash contributions from Borough Councils	36,630	0	0	36,630
<b>TOTAL</b>	<b>55,280</b>	<b>18,650</b>	<b>18,650</b>	<b>92,580</b>

What other funders are currently considering the proposal?

Funder	£
Heritage Lottery Fund	444,100
Veolia Trust	14,686
<b>TOTAL</b>	<b>458,786</b>

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff costs: Project Assistant	13,656	13,656	13,656	40,968
Staff & volunteer travel & expenses	3,134	3,134	3,134	9,402
Equipment & materials: workshops/swimming/dragon days etc	11,323	0	0	11,323
Promotional materials & translations	8,878	0	0	8,878
Events costs	1,980	440	0	2,420
Reminiscence costs	1,679	0	0	1,679
Professional fees	1,338	0	0	1,338
Management/administration/overheads	4,041	4,041	4,041	12,123
<b>TOTAL</b>	<b>46,029</b>	<b>21,271</b>	<b>20,831</b>	<b>88,131</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required?

01/10/2012

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced?

**This is a 4.5 year project. We are seeking a 3 year grant from CBT as co-funding for a HLF grant. CBT will be kept informed through project reports for the full 4.5 years. A central element of the project is volunteer training to ensure that the project is sustainable.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached?

**The only permission that will be required is from Natural England to work on a SSSI site. We cannot apply for permission until we know that the work will proceed, but as this is a biodiversity project, and we have obtained similar permissions in the past, we do not anticipate any difficulties.**

### Declaration on behalf of applicant organisation

I, KATHRYN WORMALD. (your name)

am an authorised representative of

THE FROGLIFE TRUST. (your organisation)

within which I am CHIEF EXECUTIVE OFFICER (your position)

To the best of my knowledge, all the information that I have provided in this application form is correct

Signature [Signature] Date 25/5/2012

Return the completed form to: **The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight



**ASSESSMENT CATEGORY - London's Environment**

**Spitalfields City Farm**

**Ref: 11173**

**Adv: Tim Wilson**

**Amount requested: £110,379**

**{Revised request: £102,897}**

**Base: Tower Hamlets**

**Benefit: Tower Hamlets**

**Purpose of grant request:** Manager salary costs - to facilitate a period of growth for the farm's environmental education and biodiversity programmes, new building and sustainable social enterprise.

**Background**

Running for more than 30 years, Spitalfields City Farm occupies a two acre site between Brick Lane and Whitechapel. It attracts over 35,000 visitors each year and is home to the Coriander Club, a project bringing Bengali women together to grow vegetables and promote healthy living.

The farm offers a wide range of volunteering opportunities and engages people with mental health problems, drug and alcohol dependencies as part of its work. There is also outreach to local schools as well as on site clubs to get young people involved in gardening and animal care.

Spitalfields City Farm participated in the 2012 Celebrate the City, taking sheep into the Square Mile as part of the stall for Woolmen's Hall.

**Funding History**

The first grant awarded was in late 1996, with another awarded in 2000. More recently, you supported the farm with a grant of £45,000 in June 2004 for community engagement and to promote healthy lifestyles. Monitoring reports were satisfactory and the grant was made historic some time ago.

**Current Application**

The farm seeks funding towards the Manager's salary in order to oversee an ambitious expansion of Spitalfields' environmental education, biodiversity and social enterprise programmes. With continuity of funding for the Manager, the farm will aim to engage more local schools, improve the use of its site space, and raise capital towards winter buildings.

The charity has already raised funds from other sources for the first year, and so there is a relatively sharp rise in request in years two and three.

**Financial Observations**

Latest independently examined accounts are from the year ending March 2011 and show a deficit of £11,497, equivalent to 3.7% of turnover and entirely on restricted funds. This deficit was met through reserves.

Management accounts for 2011-12 show another deficit (£16,789) which, once again, was on restricted funds and was met through reserves.

The budget forecast for 2012-13 anticipates a deficit of £16,351 (5.3% of turnover) and mainly on unrestricted funds. The charity would be able to meet this loss through reserves, but has a number of funding applications in process to mitigate the position.

The trustees aim to hold unrestricted general reserves equivalent to 3 months of core expenditure, a target of £80,550 in 2011. Free reserves during this year stood at £99,991, only slightly above the target position, and which will diminish as above

### **Officer's Appraisal**

Spitalfields City Farm has a clear development plan for its site and services. The charity has attracted a growing number of visitors and is a popular hub for local schools, youth and community groups. Funding towards the Manager's post would give the farm 'breathing space' to focus on organisational development.

At the level of funding recommended, you would not be the largest single funder. However, with organisational budgets for later years yet to be fixed, it would be wise to ensure that the organisation is aware of your "budget funder" role.

### **Recommendation**

**£102,500 over three years (£28,000; £36,500; £38,000) towards the Manager of Spitalfields City Farm on condition that the Trust does not become the single largest funder.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

Date Received:

23.4.12

Programme  
Area:

04

### 1. About your organisation

Name of organisation applying for grant: <b>Spitalfields City Farm</b>	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence <b>Buxton Street London</b>	
Postcode: <b>E1 5AR</b> Is this your home address? <b>No</b>	
Contact person: <b>Mrs Mhairi Weir</b>	Position: <b>Manager</b>
Phone: <b>0207 2478762</b>	Fax: <b>0207 2475452</b>
E-mail: <b>mhairi@spitalfieldscityfarm.org</b>	
Website: <b>www.spitalfieldscityfarm.org</b>	
Legal status of organisation: <b>Registered Charity/Company Limited By Guarantee</b> If registered, please give charity number: <b>299536</b>	
Year and month organisation established: <b>September 1978</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>London's environment</b>
Purpose for which funds are requested: (25 words maximum) <b>Manager salary costs - to facilitate a period of growth for the farm's environmental education and biodiversity programmes, new building, and sustainable social enterprise.</b>
How much funding is requested? <b>Year 1: £35422 Year 2: £36564 Year 3: £38393</b> <b>Total: £110379</b>

### 3. Aims of your organisation

Spitalfields City Farm is a safe, stimulating and inclusive community space that aims to inspire and that everyone can enjoy. Our main charitable purpose is to promote health and education of the members of our local community. Located in Tower Hamlets, an inner London Borough with one of the highest rates of deprivation in the country, the farm's community includes a diverse group of people, many of whom experience economic deprivation and social exclusion.

We aim through our programmes to offer Londoners opportunities to learn and explore urban ecologies, biodiversity, the importance of animal welfare, volunteering, sustainability, connecting with nature and food provenance.

### 4. Main activities of your organisation

Our Activities: 1) providing a community space that includes an interactive farmyard focusing on rare breed animals, a range of gardens including a vegetable garden specialised in growing South Asian produce, educational gardens and community gardens, and play space where children and young people can be safe to explore;  
2) delivering a wide range of community engagement activities such as supported education sessions for vulnerable groups (particularly young people with challenging behaviour), a gardening club for local Bengali women, community-led gardens, after-school and holiday clubs, a Young Farmer's group, training and mentoring for volunteers, and gardening and animal-care sessions for local schools;  
3) hosting local community events to encourage cohesion and respect such as Spitalfields Green Fair, International Women's Week, the Strawberry Fayre, Apple Day, a Harvest Event, and the Oxford / Cambridge Goat race;  
4) running successful social enterprise initiatives including sales of plants, gardening materials and farm produce, mobile farm visits and off site gardening and education work;  
5) running gardening outreach projects for local housing authority residents.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	8	8	104

### 6. How do you support your volunteers?

A dedicated volunteer co-ordinator, established volunteer best practice code, needs based individual mentoring, safe and secure environment, structured programmes for young people, strong feedback mechanisms, volunteer involvement at all levels.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	22 years

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2011**

Income received from:	£
Voluntary income	12,247
Activities for generating funds	71,163
Investment income	36.00
Income from charitable activities	209,525
Other sources	17,733
<b>Total Income</b>	<b>310,704</b>

Expenditure:	£
Charitable activities	318,214
Governance costs	3,340
Cost of generating funds	647.
Other	-
<b>Total Expenditure</b>	<b>322,201</b>
<b>(Deficit)/surplus for the year:</b>	<b>(11,497)</b>

Asset position at year end	£
Fixed assets	158,835
Investments	-
Net current assets	128,629
Long-term liabilities	-
<b>*Total A</b>	<b>287,464</b>

Reserves at year end	£
Endowment funds	-
Restricted funds	174,208 <sup>028</sup>
Unrestricted funds	113,436
<b>*Total B</b>	<b>287,464</b>

TW  
7/9/12

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
34%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

n/a

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Jun	/	2004	Ref: 4692	Grant received: £45000	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2008	Year: 2009	Year: 2010
(i) Lord Mayor's Show...	-	-	15000
(ii) LB Tower Hamlets	51,732	36,662	51,718
(iii) -	-	-	-
(iv) -	-	-	-
(v) Hardship	-	-	79,000
(vi) -	-	-	-

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2009	Year: 2010
Henry Smith		20,000
Vodafone	10,407	27,500
Big Lottery Young Peoples Fund		55,000
Big Lottery Local food		35,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

The farm currently has a relatively low carbon footprint because of our strong ethos of reducing waste and recycling, re-producing materials and equipment, using recycled office supplies, our composting procedures, the selling of manure to local gardeners, and our staff's commitment to travel by bicycles or public transport. We also sell our produce locally, give free workshops exploring low energy cooking, and offer an alternative viewpoint on energy consumption.

We want to do more, and in the coming years the farm plans to expand its carbon footprint focus, to make it an active part of the visitor experience. Our new community building (currently at design stage) is being planned as a best practice example of low carbon construction, and staff are in the process of building knowledge and capacity around this. Elements such as solar heating systems, sheep's wool insulation, maximisation of natural light and heat, rain-water harvesting will be included in the design. In addition, a carbon footprint audit will be carried out, aiming for a yearly reduction in the footprint of the farm.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Spitalfields City Farm is on the cusp of a much needed growth spurt. In the past 2 years it has become increasingly important within the community, as a resource to a wide range of local youth and community programmes that are facing cuts to their funding, and to large numbers of deprived inner city families who visit regularly. Schools are using the farm's education services more and more, and the farm is increasingly getting requests from individuals and groups for classes and advice sessions, information on specific environmental issues, and extended services such as room rental and a cafe. At the same time, it is struggling with the need for indoor space to meet the year-round requirements of its programmes. The farm has a strong track record in engaging its local community and responding to its diverse needs. Through recent evaluations, feedback sessions from volunteers and visitors, and staff reflection sessions, we have identified 4 key strategic growth areas, and we are applying to City Bridges Trust to fund the farm manager's salary for three years to support these upcoming changes:

1. Restructuring and expanding the Environmental Education programme. The intended outcome of this growth area is to maximise the farm's resources to widen the reach of its environmental education activities. Outputs of the expanded programme will include: an increase in formal partnerships with youth organisations and community groups; environmental classes and workshops offered to the public; formalised work experience placements in partnership with schools; targeted, practical environmental education packs; partnerships with universities and environmental institutions to create a programme of talks and discussions at the farm, establishing it as a centre for environmental thinking and debate.
2. Expanding the Biodiversity Programme through the farm's Outreach and On-Site Work. Intended outcomes for this area are to increase the spaces of biodiversity in central London, and build awareness and enthusiasm around biodiversity issues in a wide range of Londoners. Community gardening projects in local housing estates have been piloted by the farm and have been found to achieve these aims. Over the next 3 years, the manager will work to increase the farm's reputation and outreach capacity. Outputs will include increased numbers of local authority contracts, creation of several new growing spaces in Tower Hamlets, and increased numbers of Londoners participating in activities. On site, project outputs will include expanding the farm's wildlife garden and wildflower meadow into best-practice examples of biodiversity within an intensely urban landscape, and a range of workshops and educational materials for visitors to encourage take-home actions that increase biodiversity in their local area.
3. Creating a new community building, to include cafe, community kitchen, indoor workshop space, and room rental. Intended outcomes are to improve visitor experience, provide year-round space for farm activities, diversify uses of the farm, raise unrestricted funds, and create a building that is a beacon for green design. This ambitious plan is the result of an extensive community consultation process with Glasshouse Design Consultants and the community, and will be driven forward by the manager. Project outputs will include completion of design phase, achieving permissions, raising funds, managing building work, and gaining eco accreditation.
4. Underpinning it all: Intensifying social enterprise and diversifying income sources. The intended outcome for this area is to increase the long-term financial sustainability of the farm. In the last two years unrestricted income has been increased from 10% to 25% of the total income through events, donations, sales of plants and small items. The manager will extend and formalise these activities. Outputs include the establishment of a separate trading arm, an increase in the diversity of income sources, and an annual % increase in unrestricted income. Through this period of growth the farm manager, as the only full-time staff member, will be a stabilising force, engaged in daily management and organisational support.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

As part of this funding the manager will be undertaking monitoring and evaluation training from Charities Evaluation Service in order to ensure best practice and to build capacity on the farm in this area. Key to this will be establishing systems to capture and review completed work. A Manager's Action Plan has been devised for this bid (please find as a supporting document) with monitoring goals based on the projected outcomes and outputs of the key growth areas. These monitoring goals will be supported by a yearly review of the work based on manager's reports to the management committee, feedback from reflection sessions with staff and volunteers, and finally an external evaluation will be carried out at end of the project. The financial impact of the social entrepreneurship programme (growth area 4) will be visible in the financial statements of the farm and will be shown as a % of overall funding and income. We feel that the above will provide a suitable and holistic framework to show the efficacy of the manager's work with respect to this funding.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>up to 1500</b>			
In which local authority is your organisation based? <b>London Borough of Tower Hamlets</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>City of London, Tower Hamlets</b>			
At what address will the activity be located? <b>Spitalfields City Farm, Buxton Street, London, E15AR</b>			
What age group will benefit? <b>all age groups</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>
What proportion of the beneficiaries will be disabled people? <b>Approx. 17%</b>			



## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1	Year 2	Year 3	Total
		£	£	£
Manager salary	30600	32130	33737	96467
NI/PAYE	4822	4434	4656	13912
<b>TOT L</b>	<b>35422</b>	<b>36564</b>	<b>38393</b>	<b>110379</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1	Year 2	Year 3	Total
	£	£	£	£
Big Lottery - Local Food	5000	0	0	5,000
Big Lottery - change and Impact	1000	0	0	1000
Research Project	1500			1500
<b>TOTAL</b>	<b>7500</b>	<b>0</b>	<b>0</b>	<b>7500</b>

What other funders are currently considering the proposal?

We will be making an application to the Esmee Fairbairn and the Tudor Trust

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1	Year 2	Year 3	Total
	£	£	£	£
Manager's Salary	23100	32130	33737	88967
NI/PAYE	4822	4434	4656	13912
<b>TOTAL</b>	<b>27922</b>	<b>36564</b>	<b>38393</b>	<b>102879</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **June 2012**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **A key indicator of success for this funding is the manager establishing a trading arm for the farm to increase unrestricted funds. Our aim is to generate enough unrestricted funds to cover management and administration roles into the future.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **Building design needs to be completed and planning permission sought - this will be underway by June 2012.**

### Declaration on behalf of applicant organisation

I, **Mhairi Weir** (your name)

am an authorised representative of

**Spitalfields City Farm** (your organisation)

within which I am **Farm Manager** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature

*M Weir*

Date **19/4/12**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

#### Please

- do not send this application by fax or e-mail - unless applying online, applications must be posted to the Trust
- do send the information in the checklist - if items are missing, your application will be returned to you
- do send only the information in the checklist - if further information is required, we will contact you
- do ensure you have signed and dated this form - we cannot accept forms which have not been signed and dated
- do use the correct postage - the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - London's Environment**

**Thames Estuary Partnership**

**Amount requested: £24,900**  
**{Revised request: £86,776}**

**Ref: 11170**

**Adv: Ciaran Rafferty**

**Base: Camden**

**Benefit: Several London boroughs**

**Purpose of grant request:** Recruit a Biodiversity Officer for three years to ensure the River Thames Biodiversity Action group is maintained to continue to raise awareness and voice the opinions of the group.

**Background**

Thames Estuary Partnership (TEP) was established as a registered charity in 1999 with the aim of conserving, protecting and maintaining the environmental and natural heritage of the Thames. Its remit comprises the geographical area from Tower Bridge to the Isle of Grain in Kent and Shoeburyness in Essex and its principal function is to ensure the views of all estuary users are heard in how this area is used and managed – seeking to balance the interests of local communities, local and wider economy, and the environment. As such it is very much a trusted and neutral network, running workshops and projects on biodiversity, research, recreation, archaeology and fisheries.

**Funding History**

You have supported TEP once before, in March 2002, with £90,000 over three years towards an Education & Communications Officer. Reporting on this grant was mixed – satisfactory in the first two years but poor in the final year. Personnel within the organisation have changed since then however and your officer has much more confidence that the current regime would deliver satisfactory monitoring should you agree a grant.

**Current Application**

This application is for costs to support the Biodiversity Action Group – a project established by TEP in 2001. The original application was for part of the salary of the Biodiversity Officer and contained no activity or core costs. Since the application was submitted the organisation has had a review of its financial management and fundraising strategy and found that free reserves were being depleted annually principally as a result of significantly underestimating (and therefore not raising) the true value of core costs. Consequently it has submitted a revised request (appendix A to the application form) which outlines the true, actual, cost of delivering this project. Your consideration of the revised request is advised as, if you agree a grant of that level, it will help the organisation protect its existing free reserves and become more sustainable in the future.

The Biodiversity Action Group aims to maintain and enhance the diversity and populations of habitats and species supported by the estuary, whilst recognising their interdependence. The Group currently comprises of 17 members drawn from charity, commercial and statutory agencies (eg Buglife, Environment Agency, PLA, RSPB, Local Authorities). It functions positively in that, where initially there may be opposing views expressed on a particular issue, all parties seek to come to an agreement on the way forward. It aims to resolve and progress rather than to divide and entrench as it recognises that the estuary is many things to many people and that collaboration and inter-agency co-operation is the best way forward. Communication is key and a large part of the role of the Biodiversity Officer will be to engage and inform as many people as possible through systems including newsletters, social media, web, etc.

### **Financial Observations**

Audited accounts for 2011/12 have recently been received and show a deficit at the year-end of £16,517 (5.6% of turnover), all on unrestricted funds. Free reserves held at the year end amounted to £9,977 - which equates to less than 2 weeks' expenditure. The reserves policy is to hold at least 4 months' unrestricted/undesignated staffing and running costs which it estimates to equate to approximately £48,943. Free reserves currently held are therefore much lower than the desired policy although the organisation has now taken measures to ensure that they are not further depleted (eg by seeking more accurate full cost recovery as mentioned above) and that they can be augmented. The budget for the current financial year is on track to create a surplus of around £9,000.

### **Officer's Appraisal**

The Thames is a recovering ecosystem which is of great ecological importance not only to London, Kent and Essex but also upstream and to the North Sea. Preserving and enhancing this ecosystem requires communication with and between all those who use, enjoy, maintain and develop the estuary. TEP, through its Biodiversity Officer, is best placed to ensure good communication and networking continues. TEP has positive relationships with the City Corporation and both the Director of Environmental Health & Public Protection and the Assistant Director of Port Health Service are aware of and support this application.

The organisation has some financial systems for cheque signatories which are not best practice as advised by the Charity Commission. It is recommended, therefore, that any grant be conditional upon these being revised accordingly. The organisation would be happy with this condition.

### **Recommendation**

**£86,000 over three years (29,000; £28,000; £29,000) for the salary of a p/t (3dpw) Biodiversity Officer plus related core and activity costs, conditional upon satisfactory systems being in place regarding cheque signatories.**

# The City Bridge Trust

Charity Registration Number: 1035628

Ref: 11170

Date: 18/04/12

## Working with Londoners: Application for a grant

Prog. Area: 4

Please read the guidance notes before completing this form

### 1. About your organisation

Name of organisation applying for grant: <b>Thames Estuary Partnership (TEP)</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence <b>G13, UCL Environment Institute, Pearson Building, Gower Street London</b>	
Postcode: <b>WC1E 6BT</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Miss Jill Goddard</b>	Position: <b>Executive Director</b>
Phone: <b>0207 679 0540</b>	Fax:
E-mail: <b>j.goddard@thamesweb.com</b>	
Website: <b>www.thamesweb.com</b>	
Legal status of organisation: <b>Charity</b>	
If registered, please give charity number: <b>1083199</b>	
Year and month organisation established: <b>July 1999</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>London's environment</b>
Purpose for which funds are requested: (25 words maximum) <b>Recruit a Biodiversity Officer for three years to ensure the River Thames Biodiversity Action Group is maintained to continue to raise awareness and voice the opinions of the group.</b>
How much funding is requested? <b>Year 1: £8500 Year 2: £8400 Year 3: £8000</b> <b>Total: £24,900</b>

### 3. Aims of your organisation

The Thames Estuary Partnership (TEP) approaches the challenge of managing the estuary from a view point that values the contribution of all the estuaries' users and seeks to learn from, and work with, this expertise. As a neutral champion we bring together as diverse a mix of people as it's possible to find - yet all share a concern for our estuary. Our network runs between Tower Bridge, the Isle of Grain and Shoebury Ness.

We provide a neutral forum for local authorities, national agencies, industry, voluntary bodies, local communities and individuals to work together for the good of the Thames Estuary. We are a charity providing a framework for the management of the estuary.

The Thames Estuary Partnership;

- Co-ordinates a programme of projects
- facilitates new projects and forums for joint working
- holds regular events and workshops

### 4. Main activities of your organisation

In recognition of the diverse number of issues and organisations involved with the Thames Estuary, The Thames Estuary Partnership (TEP) was formed to involve and co-ordinate the wide range of users and interests. The TEP acts as an 'umbrella' body to assist with the co-ordination of actions and projects across the many different organisations and sectors involved on the Estuary. To help co-ordinate activities, action groups have been set up to drive forward partnership work on specific issues. Action groups include: Archaeology, Biodiversity, Dredging, Education, Planning and Environment, Recreation and Access and Fisheries. We were created to establish a framework for integrated catchment management since 1994. We also run funded river related projects and provide an established and successful Stakeholder Forum once a year for over 240 people and an information magazine twice a year of 5,000 copies each time, our website updates on current topics and has a wide database of over 2,500 to inform partners of any Thames issues. We are currently developing links with the Marine Management Organisation to assist with stakeholder engagement for Marine Planning for the Tidal Thames, the same boundary as this project.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	4	9	1

### 6. How do you support your volunteers?

By paying travel and lunch expenses and providing tasks to fit their interests

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
rented	3 years 2011- 2014

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	46
Activities for generating funds	292,295
Investment income	
Income from charitable activities	
Other sources	
<b>Total Income</b>	<b>292,341</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	301,810
Governance costs	7,048
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>308,858</b>
<b>(Deficit)/surplus for the year:</b>	<b>(16,517)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	3,227
Investments	
Net current assets	47,336
Long-term liabilities	
<b>*Total A</b>	<b>50,563</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	37,359
Unrestricted funds	13,204
<b>*Total B</b>	<b>50,563</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
15%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				<input checked="" type="checkbox"/>
Month/Year: Jan Mar / 2004	Ref: 2045	Grant received: £90,000	OR application rejected	<input type="checkbox"/>
Month/Year: - / -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: - / -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2008	Year: 2009	Year: 2010
(i) Natural England	10,000	10,000	10,000
(ii) Environment Agency	40,000	40,000	35,000
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2009	Year: 2010
Heritage Lottery Fund	117,907.28	131,747.44

## 14. What steps is your organisation taking to reduce its carbon footprint?

Using less paper - all staff are encouraged not to print every e-mail. Just organize their inbox to make e-mails easier to find and reference. We encourage staff to make back-up copies of important files and e-mails and keep them on an external drive, when we do have to print important documents we use sustainable paper, and set our printers or copiers to print on both sides of the page.

We also produce digital documents with electronic signatures. We also use PayPal for people to pay directly without having to print off documents.

We turn off everything we possibly can before we leave the office each day.

We have clearly labelled recycling bins in convenient locations all over the office, next to copiers and kitchen facilities and within the University we also have a compost bin.

Public transport is always our priority mode for travel and we provide TEP Oyster cards for work journeys.



## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

The Need: -TEP currently hosts a Biodiversity Action Group and have many key partners in place; this project will build upon the strong foundation of the partners to spread the message to a wider audience. The Tidal River Thames is one of the most high profile rivers in the world. It is affected by the most densely populated urban area in Europe, subject to a wide range of environmental pressures, and has an equally wide range of users. The Thames has been heavily modified resulting in a 16 foot tidal range, strong tides and currents and can provide an inhospitable environment for wildlife living in or by the river, or using it as a route from the North Sea to the water-courses of the Thames River Basin. It has a mixture of salt, brackish and fresh water in different locations, changing hourly and seasonally. While water quality has in general improved significantly since the 1960's, challenges still to be addressed include increasingly frequent overflows of raw sewage pollution into the river from an over-stretched combined sewage system; plastic and other litter thrown or blown into the river where it alienates the community and endangers wildlife; and a dearth of wildlife habitat. There is highly varied and intensive use of the Tidal Thames: boat operators from tug boat to dredgers to ferries; recreational rowers, kayakers and sailors; houseboat owners; walkers and joggers, tourists, riverside residents, and spectators. The government is undertaking a fundamental review of the River Basin Planning (RBP) strategy in the context of the European Water Framework (EWF). This requires engagement with stakeholders in new ways in order to ensure common ownership of biodiversity issues on the Tidal Thames are linked in a more local catchment base approach. There is also an emphasis on joining up previously water and land management issues, using the common ecosystem services to ensure accountability of multiple benefits provided by the nature environment. The overall aim of this project is to harness the knowledge, skills and enthusiasm of a large network of landowners, land managers, fishermen, planners, local authorities, the general public and organisations (Biodiversity Action Group) to turn round the fortunes of wildlife, on and around the Tidal Thames. We will then create a biodiversity-rich landscape to inspire residents and visitors, providing opportunities for the large and growing population of the area to connect with nature - In this case the Tidal Thames. How will it be delivered and how we meet City Bridge Trust theme (London's Environment):-

Objective 1: maintain and nurture a group of specialists (Biodiversity Action Group) to advise on biodiversity issues for the tidal Thames and spread the message to a wider audience (building upon the strong foundation of current partners. Output Facilitate three meetings per year of the Water Framework Directive group. Outcome: Maintain an informed group to guide the work of the TEP and help deliver actions contained in the Catchment Management Plan

Objective 2: Ensure that strategy plans and initiatives recognise the importance of Biodiversity within the River Thames. Output: Production of annotated maps identifying ecological sensitivity for the Tidal Thames. Outcome: Highlight sensitive areas to organisations producing plans and initiatives that may impact on sensitive areas as well as greater understanding of issues effecting the nature and quality of the Tidal Thames and what they can do to improve it.

Objective 3: Increase public understanding and appreciation of the habitats and species of the Tidal Thames. Output: Disseminate literature highlighting the wildlife value of the Tidal Thames to user groups. Outcome: Greater understanding and knowledge of the issues of Tidal Thames Biodiversity and what they can do to maintain and enhance it.

Objective 4: set up mechanisms for continuing the project beyond 2015 Output: Identify funding sources and write bids for funding Biodiversity Officer Post Outcome: Secure funding for 2015 onwards.

We have a track record of crossing geographical and political boundaries to join stakeholders of all types and produce strategic frameworks. Thames Strategy East and Tidal Thames Habitat Plan, Recreational use of the Thames Estuary, Thames Path City and Public information on dredging leaflets are some examples. All have involved wide engagement, consultation and agreement. We are also on the committee of the Coastal Partnerships Network and share best practice with 42 other UK partnerships around the English coast.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

1. We will establish a set of challenging milestones reflecting quality and quantity issues of outputs and outcomes.  
 2. We will measure against a set of agreed objectives and outcomes.  
 3. A full annual report will be available to all stakeholders

This project compliments a recently succesful bid from Natural England and as such we will also provide: A Geographical Information System which will be used to map habitat extent and quality, using for example NVC as a baseline, and to record the changes implemented. Baseline surveys will be undertaken of a number of key species (e.g. breeding lapwings, size of Thames terrace invertebrate colonies), depending on conservation status (eg red listed) and suitability as indicators of ecosystem health/habitat quality. They will use accepted standard techniques, such as the BTO/JNCC/RSPB Breeding Bird Survey, and not divert undue resource from delivery of the project. Surveys will be repeated during and at the end of the programme (and at periods thereafter) and any changes in status reported.

**17. Beneficiaries**

How many people will benefit from the grant per year? **all river users**

---

In which local authority is your organisation based?  
**London Borough of Camden**

---

Which borough(s) of Greater London will benefit from this grant?  
 (if more than one, please give % for each)  
**London Boroughs of Wandsworth, Lambeth, Southwark, Greenwich, Bexley, Hammersmith & Fulham, Kensington & Chelsea, Westminster, Tower Hamlets, Newham and City of London 9% each**

---

At what address will the activity be located? **River Thames, The Biodiversity Officer will be based at TEP**

---

What age group will benefit? **All age groups**

---

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>x</b>

---

What proportion of the beneficiaries will be disabled people?  
**Not known at this stage**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
TEP Executive Director 5% PA(Management)	2,200	2,500	2,750	<b>7450</b>
Biodiversity Officer salary	25,000	25,750	26,500	<b>77,250</b>
On Costs employer NI etc	3,125	3,218	3,312	<b>9,655</b>
Postage, telephone and stationery	1,000	1,000	1,000	<b>3,000</b>
Travel and subsistence	500	500	500	<b>1,500</b>
Litrature	1000	1500	1750	<b>4250</b>
<b>TOTAL</b>	<b>32,825</b>	<b>34,468</b>	<b>35,812</b>	<b>103,105</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Water Framework Directive	8,500			<b>8,500</b>
Nature Improvement Area (Natural England)	8,000	8,000	8,000	<b>24,000</b>
<b>TOTAL</b>	<b>16,500</b>	<b>8,000</b>	<b>8,000</b>	<b>32,500</b>

What other funders are currently considering the proposal?

Ongoing applications for funding are being made. With your funding in place it will help us lever additional match funding. We plan to apply to the Catchment Restoration Fund.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Part Salary for Biodiversity Officer	8,500	8,400	8,000	<b>24,900</b>
<b>TOTAL</b>	<b>8,500</b>	<b>8,400</b>	<b>8,000</b>	<b>24,900</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **September 2012**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **Once the Biodiversity Officer is in place, he/she along with Thames Estuary Partnership Executive Director will continue to identify and develop further fundraising bids to continue this post.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **NA**

### Declaration on behalf of applicant organisation

I, **Jill Goddard** (your name)

am an authorised representative of

**Thames Estuary Partnership** (your organisation)

within which I am **Executive Director** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **12<sup>th</sup> April 2012**

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

**18. Funding required for the project**

What is the total cost of the proposed activity/project?  
(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Biodiversity Officer salary (3 dpw)	15,000	15,300	15,606	<b>45,906</b>
NI Employer costs	2,160	2,180	2,200	<b>6,540</b>
Contribution to core/overheads	8,538	8,709	8,883	<b>26,130</b>
Travel	750	800	900	<b>2,450</b>
Resources (maps, printing, reports)	1,000	1,000	1,250	<b>3,250</b>
Equipment (phone, laptop, software)	1,500	500	500	<b>2,500</b>
<b>TOTAL</b>	<b>28,948</b>	<b>28,489</b>	<b>29,339</b>	<b>86,776</b>

What income has already been raised?  
(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
n/a				
<b>TOTAL</b>				

What other funders are currently considering the proposal?

**Support funding of £10,416 pa for a related/complementary part-time post of Project Management Officer and some overheads is already in place.**

**19. Funding requested from the Trust**

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Biodiversity Officer salary (3 dpw)	15,000	15,300	15,606	<b>45,906</b>
NI Employer costs	2,160	2,180	2,200	<b>6,540</b>
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Equipment (phone, laptop, software)	1,500	500	500	<b>2,500</b>
<b>TOTAL</b>	<b>28,948</b>	<b>28,489</b>	<b>29,339</b>	<b>86,776</b>

**ASSESSMENT CATEGORY - Older Londoners**

**Open Age**

**Amount requested: £59,333**

**Ref: 11176**

**Adv: Ciaran Rafferty**

**Base: Kensington &  
Chelsea**

**Benefit: Several London  
boroughs**

**Purpose of grant request:** To contribute to the core costs of the organisation, funding 50% of the Head of Community Learning's position, to continue growth of provision and expansion into new areas.

**Background**

Open Age is an established, user-led, charity which serves several west London boroughs enabling older people (aged from 50-100+) to sustain their physical and mental fitness, maintain active lifestyles and develop new and stimulating interests. The charity provides a wide range of physical, creative and mentally stimulating activities to enable older people to develop new skills, fulfil their potential, and encourage social interaction thus helping reduce loneliness, isolation and depression.

Over 200 weekly activities are provided from more than 50 sites which include its own Positive Age Centre in North Kensington; the Open Age Hubs in Westminster; as well as community centres, sheltered housing, church halls and libraries. Activities vary from those that are health and fitness related such as yoga, chair exercise and walking groups to creative and performing arts sessions, weekly groups with speakers and regular computer classes. The organisation is serious about trying to reach and involve those most isolated or frail and can demonstrate success in this.

**Funding History**

The first grant made to Open Age was as long ago as November 1996. Since then there have been three grants awarded. The first of these was for £37,500 (in February 2001) for arts and health activities; the second, in September 2004, was a capital grant of £80,000 towards the costs of the New Horizons Centre; and the most recent grant, made in October 2007, was for £60,000 over three years supporting some of the Director's salary costs. All grants were satisfactorily monitored.

**Current Application**

Many smaller/medium-sized charities (ie those with an annual income somewhere between £250,000 - £2m) say that they are struggling to raise funds for their core/infrastructure costs. Whilst many funders are now more receptive to supporting core costs (either specifically or as an

element of project funding) there remain many who are not. Even where core funding is available it is still difficult for charities to have the true costs met in full. This application is to assist Open Age meet some of the core costs associated with its Community Learning programme, in particular towards the salary of the head of that service.

The Community Learning programme is critical to the work and the success of Open Age. Under this banner the organisation provides a range of IT, health and social courses and activities. Some of these require paid tutors to be recruited and managed whilst others rely heavily on volunteer tutors who also need recruiting and supervising. The extent of Open Age's reach is such that it must – and does – develop and maintain effective partnerships with other organisations and, again, much of this falls on the desk of the Head of Community Learning.

### **Financial Observations**

Audited accounts for 2011/12 are summarised on the application form. The deficit in the year (equivalent to 6% of turnover) was due largely to restricted funds being insufficient to cover the full costs of the services provided. (The organisation expressed that that year had been particularly difficult for them.) Draft figures for 2011/12 show an improved picture, however, with income of £1.02m against expenditure of £993k creating a restricted surplus of £28,000. As at March 2012 the unrestricted cash reserves stood at £117,000 (down slightly on the March 2011 level of £120,000). The reserves policy is a target level of 3 months' running costs which would equate to c.£250,000. Whilst the March 2012 level is just under half of that the organisation is doing everything possible, including securing more core funding, to increase the reserves to the target level. The budget for the current financial year is on track to at least break even.

### **Officer's Appraisal**

Although Open Age works with what many would consider the younger element (50+) almost half of its ever-increasing membership are aged 70 or above (see detail at Q17 on the application form). The organisation's range and its commitment to providing stimulating and meaningful activities for all its members is can be held up as a model to replicate. Nor does it rest on its laurels and, having recently amended its constitution, it intends to extend its services to older and isolated people in other, neighbouring, boroughs. This application, if approved, will greatly help it to sustain its current provision (through supporting some of its core costs and thereby reducing the need to draw on its free reserves) and to continue to expand to meet the needs of an increasing demographic.

### **Recommendation**

**£59,000 over three years (£19,000; £20,000; £20,000) towards the salary costs of the f/t Head of Community Learning.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11176

Date Received:

23.4.12

Programme  
Area:

5

### 1. About your organisation

Name of organisation applying for grant: <b>Open Age</b>	
If the organisation is part of a larger organisation, what is its name? <b>Not applicable</b>	
Address for correspondence <b>1 Thorpe Close London</b>	
Postcode: <b>W10 5XL</b> Is this your home address? <b>No</b>	
Contact person: <b>Mrs Helen Leech</b>	Position: <b>Director</b>
Phone: <b>020 8964 1900 x209</b>	Fax: <b>Not applicable</b>
E-mail: <b>HLeech@OpenAge.org.uk</b>	
Website: <b>www.OpenAge.org.uk</b>	
Legal status of organisation: <b>Charity</b>	
If registered, please give charity number: <b>1039520</b>	
Year and month organisation established: <b>April 1994</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Older Londoners</b>
Purpose for which funds are requested: (25 words maximum) <b>To contribute to the core costs of the organisation, funding 50% of the Head of Community Learning's position, to continue growth of provision and expansion into new areas</b>
How much funding is requested? <b>Year 1: £18,899 Year 2: £19,698 Year 3: £20,736</b> <b>Total: £59,333</b>



### 3. Aims of your organisation

The charity's objects as taken from the Constitution are to work with people aged 50 and over particularly, those resident in the Royal Borough of Kensington and Chelsea and Westminster but also across other London boroughs to improve their quality of life by:

1. Advancing education and providing recreation and other leisure time occupation
2. Relieving unemployment in such ways as may be thought fit including:
  - a) Developing skills and confidence and accessing further education, training and employment
  - b) Providing careers advice and guidance and opportunities for work placements
  - c) Other assistance to individuals in finding employment

### 4. Main activities of your organisation

- Open Age, established in 1993, is a user led charity providing 200 low cost physical, creative & mentally stimulating, learning & health related tutored activities for 1,000 people over the age of 50 each week
- Activities are run from over 50 different sites including our own centres as well as community centres, sheltered housing, church halls, libraries and sports centres across the Royal Borough of Kensington & Chelsea, Westminster and surrounding boroughs
- We also have programmes to support unpaid carers to look after friends and family; Link-up workers to support people into activities; and telephone based activity groups for those completely housebound
- We offer Matrix accredited information, advice & guidance to help unemployed people over 50 back into work or training. This includes 1-to-1's, a Job Club, IT Courses & Training Seminars
- Our services promote better health & wellbeing, encourage interaction, help reduce loneliness, isolation, & depression across the social spectrum – helping build happy, healthy communities

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
11	15	13	100

### 6. How do you support your volunteers?

Open Age assesses, trains & matches volunteers skills, health & availability to a variety of opportunities within the charity, creating new roles if required. We offer ongoing training/support/upskilling providing a sense of purpose & achievement

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased - Head Office	3 Years

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	153,387
Activities for generating funds	0
Investment income	1,394
Income from charitable activities	876,443
Other sources	0
<b>Total Income</b>	<b>1,031,224</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	1,067,881
Governance costs	15,801
Cost of generating funds	9,194
Other	0
<b>Total Expenditure</b>	<b>1,092,876</b>
<b>(Deficit)/surplus for the year:</b>	<b>(61,652)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	1,047,986
Investments	0
Net current assets	238,682
Long-term liabilities	0
<b>*Total A</b>	<b>1,286,668</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	1,166,623
Unrestricted funds	120,045
<b>*Total B</b>	<b>1,286,668</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
74.6%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

Open Age has changed its Chairman since the last Trustees Report & Financial Statements were published in September 2011. David Sinclair, Head of Policy & Research at the International Longevity Centre having been elected. The structure of activities for older people across Westminster are now more concentrated on deprived areas since the Council re-tendered for Activity Provision in August 2011, 4 tenders being won by Open Age.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: Oct	/ 2007	Ref: 8276	Grant received: £60,000	OR application rejected	<input type="checkbox"/>
Month/Year: Jun	/ 2003	Ref: 948	Grant received: £37,500	OR application rejected	<input type="checkbox"/>
Month/Year: Oct	/ 2002	Ref: 2778	Grant received: £0	OR application rejected	<input checked="" type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2008	Year: 2009	Year: 2010
(i) City of London	£0	£0	£0
(ii) London Boroughs: see detail	£312,368	£440,281	£421,262
(iii) London Councils: see detail	£0	£19,560	£21,388
(iv) Health Authorities: see detail	£217,947	£253,676	£267,451
(v) Central Government Departments	£900	£0	£0
(vi) Other Statutory Bodies	£22,302	£21,468	£59,082

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2009	Year: 2010
Big Lottery	£126,499	£82,888
Westway Development Trust	£40,000	£30,000
Campden Charities	£16,000	£20,000
Genesis Housing Trust	£15,814	£15,462
Peabody Trust	£5,742	£4,500
Other Charities/Trusts (x6/x3)	£16,177	£12,946

## 14. What steps is your organisation taking to reduce its carbon footprint?

Open Age is working to reduce the carbon footprint within venues & offices it manages by turning off unused equipment, lights, printers, computers etc as well as re-cycling paper and other items, using double sided prints & encouraging staff to use public transport (or bicycles) where possible.

Members are encouraged to adopt good environmental practices through information, talks and by demonstration. They are encouraged to use local venues for activities & access local 'attractions' for visits out (less travel & accessed 'off peak' to support optimal usage). When travel is required they are encouraged to use public or community transport or travel on foot. Open Age even pays with external funding to join people to community transport schemes where they have physical impairments to get them used to the schemes.

The charity further uses underutilised venues & facilities for activities reducing their carbon footprint & improving their ongoing financial viability.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Need for the Project & How Assessed: Over the last twelve months there has been rapid growth in membership at Open Age, with 1,577 renewing and a further 1,110 new recruits (not including a further 795 members at New Horizons, a partnership Centre led by Open Age). The Trustees have recognised that this places an increased burden on activity delivery & management, co-ordinated by The Head of Community Learning, who also runs & delivers our innovative range of popular Computer and New Technology related activities. The Trustees have identified that as her responsibilities have increased the role needs specific time to co-ordinate, administer, develop and create appropriate strategies for growth. They have particularly identified the need to enhance partnership working – through the promotion of older people's active health management more widely to partners and government - and thus raise our profile and help contribute towards ever increasing costs. This can only be achieved if appropriate funding is sourced to allow for these changes away from direct activity provision.

There is a further ongoing need to ensure sustainable activity provision; continued growth in numbers of activities offered and appropriate tutors to deliver them, areas served and numbers supported; as well as continuing to support the development of ways to reach and engage the most isolated and vulnerable in society.

Ensuring Open Age continues to provide what is required by the community and engage more people has additionally been ascertained via focus groups, fora and questionnaires over the last 12 months, the findings of which now need strategic implementation.

How the Work will be Delivered: The work will be delivered by the Head of Community Learning being able to allocate 50% of her time to the objectives of the project.

The projected achievements of the project: Specifically these will be as follows: (1) Growing the number of activities offered; (2) Sourcing, supporting & training an increased number of appropriately qualified Tutors to deliver activities; (3) Growth & development of Open Age's pioneering IT agenda, supporting some of the 6,000,000 older people still to take their first steps to use new technologies; (4) Growing involvement of volunteers placed in activity supporting positions within Open Age & growth in roles undertaken.

Additionally the role supports a full range of health benefits for older people by active participation & exercise, helping reduce loneliness, isolation & depression. Members will further be better informed how to manage their own health & be better able to support each other within the community.

Why Open Age is the right organisation to deliver the work: Award Winning, Open Age has been delivering quality user led activities for older people since 1993 and now runs around 200 activities a week, accessed by 1,000 different individuals. The Charity is renowned as an expert in its field.

Meeting the Trust's Older Londoner's Theme: Open Age provides a varied range of over 200 weekly learning & health related activities to support all, particularly those disadvantaged, from 50 to 105 to live healthier, more active lives. User led, we encourage & develop volunteers & community support to manage costs & give purpose. Providing social interaction & exercise has been shown through research to prevent the onset of both dementia and Alzheimer's in older people.

Meeting the Trust's 'Principles of Good Practice': Older people, some in their 90's, are involved as Trustees & the Charity is user led & driven. It is open to all and respects and actively promotes diversity. Volunteers are valued & their training & development supported in an ongoing manner. The charity takes steps and encourages members to reduce their carbon footprint.

Attached is the job description & salary details for the Head of Community Learning and a more detailed proposal for consideration which includes full responses for questions 11 & 12 above.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

The programme outcomes will be monitored and evaluated by the following means:

1. Growing the number of activities offered: Evidenced by increased numbers of activities provided & increasing the number of people supported (particularly those over 70) through membership
2. Growth in the number of Tutors: Evidenced by increased numbers of appropriately qualified Tutors available to deliver Open Age activities, & training sessions having taken place for Tutors
3. Open Age's Pioneering IT Agenda: Evidenced by growth in provision, & changing provision to reflect adoption of different technologies/products, & working with partners and/or government to promote or recognise Open Age's achievements in teaching older learners about IT
4. Growing involvement of older volunteers: Evidenced through monitoring numbers of helpers supporting an increased range of functions within the charity

The above outcomes support City Bridge Trust's Older Londoner's programme objectives: More older people living healthier & more active lives; People with dementia & Alzheimer's improving the quality of their lives; & More older people actively contributing as community volunteers

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>around 3,500</b>			
In which local authority is your organisation based? <b>Open Age's Head Office is in the Royal Borough of Kensington &amp; Chelsea</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>City of Westminster (44.3%), Royal Borough of Kensington &amp; Chelsea (40.2%), Brent (6.1%), Hammersmith &amp; Fulham (3.4%), Barnet (1.5%)</b>			
At what address will the activity be located? <b>1 Thorpe Close, London, W10 5XL</b>			
What age group will benefit? <b>15.7% age 50-60; 32.7% 60-69; 30.2% 70-79; 13.2% 80-89 and 1.7% 90+ (6.2% older people refuse to give age)</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	<b>43</b>	Black - Caribbean	<b>8</b>
White - Irish	<b>6</b>	Black - African	<b>4</b>
White - Other (please describe) <b>European &amp; unspecified</b>	<b>12</b>	Black - Other (please describe) <b>not detailed/mixed race</b>	<b>4</b>
Asian - Indian	<b>3</b>	Black - British	
Asian - Pakistani	<b>1</b>	Chinese	<b>1</b>
Asian - Bangladeshi	<b>0.5</b>		
Asian - Other (please describe) <b>Japanese/Filipino/Thai/..</b>	<b>4.5</b>	Other (please describe) <b>Arabic/Ar.Brit; unknown</b>	<b>13</b>
Open to everyone			<b>100</b>
What proportion of the beneficiaries will be disabled people? <b>29.9% or Open Age Members have recorded a disability within our database, and 9.4% are registered disabled</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary	32,361	33,730	35,506	101,597
National Insurance	4,466	4,655	4,900	14,020
Pension	971	1,012	1,065	3,048
<b>TOTAL</b>	<b>37,798</b>	<b>39,397</b>	<b>41,471</b>	<b>118,665</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Royal Borough of Kensington & Chelsea	7,902	0	0	7,902
Chelsea Football Club	3,312	0	0	3,312
Westminster City Council Senior's Online	1,000	0	0	1,000
<b>TOTAL</b>	<b>12,214</b>	<b>0</b>	<b>0</b>	<b>12,214</b>

What other funders are currently considering the proposal?

The Head of Community Learning teaches & runs Open Age Computer Groups, therefore funding is sought from The Royal Borough of Kensington & Chelsea annually to cover these costs. The balance comes from Core Funding, an increasing challenge to source.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Head of Community Learning's Role:				
50% of Salary & On-Costs	18,899	19,698	20,736	59,333
<b>TOTAL</b>	<b>18,899</b>	<b>19,698</b>	<b>20,736</b>	<b>59,333</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **From 1<sup>st</sup> September 2012**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **The Director of Open Age continually reviews the Charity's funding strategies in conjunction with the Trustees and the Business & Development Manager. As a group they are looking to diversify income streams over the longer term to include greater levels of Corporate & Trust support. This income will be geared towards covering core costs, like those covered by this bid, in an ongoing sustainable way.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **Not applicable**

### Declaration on behalf of applicant organisation

I, **Helen Leech** (your name)

am an authorised representative of

**Open Age** (your organisation)

within which I am **The Director** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **18<sup>th</sup> April 2012**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Older Londoners**

**Sudbury Neighbourhood Centre (Middlesex)  
Limited  
Amount requested: £47,890**

**Ref: 11110  
Adv: John Merivale  
Base: Brent  
Benefit: Brent**

**Purpose of grant request:** A contribution towards the salary of the Centre Manager of Sudbury Neighbourhood Centre (Middlesex).

**Background**

Sudbury Neighbourhood Centre (SNC) is a community centre for older people, established in 1979 by the Methodist Church. It is now an independent charity, and includes representatives of the local Methodist, Roman Catholic and Anglican churches, alongside other local people, among its trustees. The Centre enjoys a well-equipped building and garden, from where it runs a range of social activities such as keep fit, reminiscence and other games, computer and art classes, gardening, music and dance, day trips and holidays. It is also able to fetch and carry members in its own adapted minibuses. Over and above this, it provides a high level of care, which extends beyond bathing, chiropody and hair-washing, to include the medical services of a qualified nurse and visiting physiotherapist. Thanks to these, the clients (a high proportion of whom suffer from dementia) are able to benefit from clear care plans and the necessary liaison with GP's and social workers.

**Funding History**

You have funded SNC once before in November 2000, with £50,000 towards the refurbishment of the building itself. That work has survived well. From your officer's visit it was evident the building is extremely well used and appreciated.

**Current Application**

The request is for a part of the salary of the Care Manager – the senior staff role. This would thus be a simple contribution to core costs, which is acceptable given that all of SNC's activities meet the criteria of your Older Londoners theme. The Care Manager leads on policies and guidelines for the delivery of individual care packages for clients, managing staff, and overseeing the Centre's social activities which are run by the deputy care Manager.

The request is for just under 50% of the gross salary. The balance has been secured for the first year, and the plan is to continue to find the balance from other Trusts and Foundations in years 2 and 3.



## **Financial Observations**

SNC derives income from a mix of charitable, church, and local authority sources. Brent Social Services can fund only those clients whose needs are classed as "critical and substantial". Most of the members pay a fee of £15/day + transport at £5. This is heavily discounted since actual costs work out at £57, based on a five-hour day.

Over the three years prior to 2011, SNC suffered substantial deficits (in the region of £30,000 to £80,000). The year to March 2011 is quite untypical, since SNC enjoyed a rare quantity of unexpected legacies (from former members) which boosted reserves by some £300,000. Rather than rest on these laurels, in April 2011 Trustees embarked on a structured appeal aimed at updating and re-equipping the centre in several areas (such as transport, computing, sound system and other facilities) and ensuring sufficient funds to subsidise day-care costs in the long term. This appeal has concentrated on targeted applications to Trusts and Foundations. It raised some £86,000 in the year to March 2012, and is proving similarly effective in the current year so far. Nevertheless, management accounts for the year to March 2012 indicate an operational loss of £4,000 against income of £506,000, and the budget for the current year 2012-13 expects to draw £94,000 from the legacy reserves.

Trustees have revised the organisation's reserves policy in light of both its unsettling history of deficits and, more importantly, the long-term care needs of members. These have prompted an ambitious aim to set aside the equivalent of two years' running costs – approximately £1.12 million. The present level of reserves equates to approximately one year's running costs, and is thus well short of this target.

## **Officer's Appraisal**

This is a very lively and well used centre, providing a wide range of social activities which are evidently much appreciated by members. It is relatively unusual in that it also provides a high level of professional medical care, which enables elderly people – many of whom suffer from dementia – to remain active and be well occupied away from their own home.

## **Recommendation**

**£47,900 over three years (£17,900; £15,000; £15,000) towards the salary of the Centre Manager.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11110

Date Received:

07/03/12

Programme  
Area:

5

### 1. About your organisation

Name of organisation applying for grant: <b>Sudbury Neighbourhood Centre (Middlesex)</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence <b>809 Harrow Road, Wembley, Middx HA0 2AP</b>	
Postcode: <b>HA0 2AP</b>	
Is this your home address? <b>No</b>	
Contact person: <b>Mrs KAREN MCKENNA</b>	Position: <b>APPEALS MANAGER</b>
Phone: <b>07801 731879</b>	Fax:
E-mail: <b>laviniamckenna@yahoo.co.uk</b>	
Website: <b>www.sudburyneighbourhoodcentre.co.uk</b>	
Legal status of organisation: <b>REGISTERED CHARITY</b>	
If registered, please give charity number: <b>1079460</b>	
Year and month organisation established: <b>NOVEMBER 1979</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Older Londoners</b>
Purpose for which funds are requested: (25 words maximum) <b>A Contribution towards the salary of the Care Manager of Sudbury Neighbourhood Centre (Middlesex)</b>
How much funding is requested? <b>Year 1: £17,890 Year 2: £15,000 Year 3: £15,000</b>
<b>Total: £47,890</b>

### 3. Aims of your organisation

We aim to offer social, practical and emotional support to frail, lonely and isolated elderly, disabled and vulnerable people and their carers, thereby improving the quality of their lives.

The Sudbury Neighbourhood Centre provides a daily care service for elderly, disabled and vulnerable people who reside in the London Borough of Brent (one of London's poorest boroughs with a high deprivation rate) and the neighbouring Boroughs of Harrow and Ealing. The majority of these people suffer in some way from physical and mental disabilities and have special care and support needs. Of the 125 clients, 25% suffer from dementia or early forms of dementia. The Centre also focuses on preventing isolation by providing a special place where local people can integrate with friends, share interests and participate in community life through social, cultural and educational activities. In many cases it provides respite for carers too.

### 4. Main activities of your organisation

We provide essential activities that stimulate the minds of people in their later years as well as maintaining socialisation for otherwise isolated individuals. This is achieved through activities that have a wonderful effect on older people and a huge benefit to patients with dementia:

Luncheon Club, Keep Fit Club, 'Fit as a Fiddle Sessions' - games based upon the act of reminiscence, Art Classes, Bridge and Scrabble Clubs, Computer Classes, Gardening Club, Music and Dance Classes, Tai Chi Classes, Older Movies Club, Day Trips and annual holiday to the South Coast.

We also transport the clients to and from the Centre in specially adapted mini buses, provide a home cooked lunch or food shopping service for elderly people who cannot get to the Centre or shop for themselves, special bathing facilities with a carer for clients who are unable to use a normal bath, hairdressing services and chiropody services. We are also opening a clinic where a nurse can offer basic medical advice and test blood pressure, hearing and eye tests, sugar level tests, dietary advice etc. There will also be a Welfare Officer working part time at the Centre who will offer financial advice and assistance.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
5	12	10	20

### 6. How do you support your volunteers?

We have a bank of 120 Volunteers. Our volunteers are a critical element of the extra level of care achieved at Sudbury. They are deeply valued, and supported through their supervision and their training alongside paid employees.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	23 Years

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	490,110
Activities for generating funds	3,763
Investment income	925
Income from charitable activities	279,215
Other sources	0
<b>Total Income</b>	<b>774,013</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	451,320
Governance costs	6,000
Cost of generating funds	1,603
Other	0
<b>Total Expenditure</b>	<b>458,923</b>
<b>(Deficit)/surplus for the year:</b>	<b>315,090</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	443,434
Investments	0
Net current assets	451,683
Long-term liabilities	(21,000)
<b>*Total A</b>	<b>874,117</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	
Unrestricted funds	874,117
<b>*Total B</b>	<b>874,117</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
26%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

In April 2011 the Centre started a new fundraising appeal and has already raised £80,000 with over 500 Trust applications. Extensive research is underway to establish appropriate trusts, corporates and individuals who would be willing to support us (a full list of these can be provided). We are currently developing a network of Vice Patrons to enhance this work. We have also received very generous legacies, totalling £450,124 -see extra notes on accs.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2008	Year: 2009	Year: 2010
(i) City of London	None	None	None
(ii) London Boroughs - Brent	178,951	207,253	210,159
(iii) London Councils	None	None	None
(iv) Health Authorities	None	None	None
(v) Central Government Departments	None	None	None
(vi) Other Statutory Bodies	None	None	None

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2009	Year: 2010
No applications were made to Trusts and Foundations during this period		

## 14. What steps is your organisation taking to reduce its carbon footprint?

The Centre is very conscious of ecological matters. Older people often need additional heating but the modern building is well-insulated and the temperature is properly managed; the two boilers are both of modern condensing designs. Clients are advised on their use of energy at home. The Centre sorts its waste properly to maximise recycling. The vehicles are well maintained to ensure their fuel efficiency and low emissions, and their routes are planned to minimise the mileage.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

We are very aware of the need for our Centre. We have seen considerable demographic changes in our local community over the 30 years since we first opened our doors. The Centre is in the London Borough of Brent and also serves the neighbouring Boroughs of Harrow and Ealing. Brent is one of London's poorest boroughs with a high deprivation rate. Over the last decade the dependency rate has increased as has the percentage of residents over 60. We see more elderly and vulnerable people living alone and an increase in loneliness, particularly when considering increased longevity and smaller family units. For many of our clients visiting the Centre is the only social contact they will have with other people all day.

We would use the funding from the City Bridge towards the salary of our Care Manager. The Care Manager takes the lead role in promoting the day care services and is responsible for all aspects of the Centre's day to day management, she leads and directs the work of the care staff team to assess and meet the needs of all the clients at the Centre. They collaborate with the Administration Manager on matters to do with the management of the Centre that do not fall directly within the 'care' remit, and works closely with the Deputy Care Manager in the deployment of staff and volunteers to enable them to fulfil the aims and objectives of the Sudbury Neighbourhood Centre. The Care Manager is also in charge of training and development, record keeping, activities and socialization, health and safety, quality and improvement and equality and diversity. They are the linchpin of the Centre.

We are the right organisation to do this work because with 30 years' experience we know what our clients' needs are and how to provide the best service. We have a superb team of 5 full-time carers and 12 part-time carers. We also have a bank of 120 volunteers, with an average 20 volunteers providing an invaluable service each week. We also have a very supportive and enthusiastic committee. We are a strong team all working towards the same goals and ideals. This makes for a very happy, successful community.

Our project meets perfectly with the aims of the City Bridge Trusts "Older Londoners", We work with older people and work hard to encourage them to live healthy, active, social, stimulating and fulfilled lifestyles. Many of our clients spend the majority of their lives sat in front of their televisions in their homes on their own, we want to be able to offer them a far better alternative. Many feel unable to leave their homes because of mobility reasons, their mental capabilities, confidence, money or the lack of family and friends to visit. Our Centre is a wonderful community, time is given to everyone to encourage them to feel home from home, that they are special, that they are needed. That they are still important, respected, useful members of society and not just another lonely statistic.

How we meet the trusts' principle for good practice:

We aim to offer social, practical and emotional support to frail, lonely and isolated elderly people from all backgrounds and support their carers. Many of our valued volunteers are older people who are very much involved in the running of Sudbury Neighbourhood Centre.

- we involve older people in the management and running of the service
- we welcome people of all backgrounds and value diversity
- we value and support volunteers
- we take good steps to reduce our carbon footprint.

A copy of The Care Managers Job Description is enclosed.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

It is very difficult to monitor the daily effect on our clients lives that the work of the The Care Manager obtains. The only true way to see how successful they have been, is to see how happy the clients are at the Centre and how much enjoyment and fulfilment their time at the Centre gives them. The Care Manager works tirelessly to ensure everyone is made to feel special and all their individual needs are met and their quality of life enriched. They work hard at organising the day to day running of the Centre, the activities, the services, holidays and days out. The Care Manager is also very well respected by all the team of staff and volunteers. It takes an enormous amount of hard work and enthusiasm to create the very happy environment and smooth running of the Centre.

**17. Beneficiaries**

How many people will benefit from the grant per year? **73**

In which local authority is your organisation based?

**Brent**

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

**Brent = 89%**

**Ealing = 10%**

**Harrow = 1%**

At what address will the activity be located? **Sudbury Neighbourhood Centre  
809 Harrow Road, Wembley, HA0 2LP**

What age group will benefit? **60+ Brent is the most multicultural Borough in Britain. Staff and Volunteers are from all ethnic groups.**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?

**90%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Care Manager Salary =£26,650	34,890	34,890	34,890	104,670
NI = £7,072				
Pension Contribution 23%				
Total salary = £34,890.13 pa				
<b>TOTAL</b>				

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Robert McAlpine Foundation	10,000			
Annandale Trust	5,000			
Rank Foundation	2,000			
<b>TOTAL</b>	<b>17,000</b>			

What other funders are currently considering the proposal?

Since March 2011 we have raised £80,231 from our appeals. Apart from the £17,000 already raised towards Managers salary the other money has been allocated to other projects for the Centre. We are applying to more Trusts and building our Vice Patron list.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Contribution towards Care Manager salary	17,890	15,000	15,000	47,890
<b>TOTAL</b>	<b>17,890</b>	<b>15,000</b>	<b>15,000</b>	<b>47,890</b>



## 20. Funding requested from the Trust (continued)

When will the funding be required? **As soon as possible as our Care Manager is already employed and it is essential to ensure that this key role is secure for the next three years, to continue this vital work.**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **We will always need a Care Manager at Sudbury Neighbourhood Centre it is the key role for being able to run the Centre successfully. We are approaching many Trust and Foundations to help us with our funding and also building a network of Vice Patrons.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached?

### Declaration on behalf of applicant organisation

I, **Mrs Karen Mckenna** (your name)

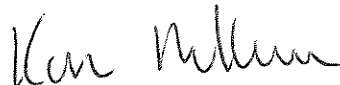
am an authorised representative of

**Sudbury Neighbourhood Centre** (your organisation)

within which I am **Appeal Manager** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **05-03-12**

**Return the completed form to: The City Bridge Trust**

City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

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**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Koestler Trust**

**Ref: 11063**

**Amount requested: £89,439**  
**{Revised request: £77,665}**

**Adv: Clare Thomas**  
**Base: Hammersmith & Fulham**  
**Benefit: London-Wide**

**Purpose of grant request:** Two-year Arts Worker employment contract at the Koestler Trust, and first year of following position: for ex-offenders resettling in London, with training and pastoral care.

**Background**

The Koestler Trust, named after the novelist and journalist Arthur Koestler, has a fifty year track record of encouraging prisoners and secure detainees to participate in a variety of art forms. Organised as a competition, the prestigious Koestler Awards are held annually and involve three main categories. These are: Writing (with 14 sub-categories); Performance, Audio and Film (with 8 sub-categories) and Visual Arts & Crafts (with 28 sub-categories).

The Koestler Trust is accommodated within the Wormwood Scrubs estate and is well regarded within the prison system and every prison in the UK submits entries. The therapeutic benefits of the arts in prisons are well-documented. Purposeful activity can contribute to the rehabilitation process by helping develop self-discipline, increasing self-esteem through achievement and by providing an outlet for boredom and frustration. Prison staff have acknowledged the calming effect that the arts can have in reducing tension within prisons.

**Funding History**

An eco-audit was provided in 2011.

**Current Application**

Last year, for the annual Koestler Awards Art Exhibition held at the Southbank Centre, over 8,000 entries were submitted and selecting the art for the exhibition is extremely time-consuming. High-profile judges such as Grayson Perry and Emma Bridgewater consider entries from far and wide. Whilst every entrant gets a participation certificate and feedback on their work, there are 1,500 cash awards amounting to £30,000 in total. Prizes range from £20 (for under 18s) to platinum awards which are £100 plus a gilded certificate.

The Koestler Trust organises sales from the exhibition and prices start at about £15 and rise to £500 for outstanding works; but most fetch £50 -

£100. Proceeds from the sales are divided as follows: 50% for the artist; 25% for Victim Support and 25% for the Trust to help with its core costs.

The original application was for the costs of an Arts Worker – an ex-offender being resettled to London. However, not all of the end beneficiaries would have been Londoners. In the course of assessment it was therefore agreed with the organisation that a better fit with your core criterion of London benefit would be to consider the proportion of the key elements of the overall Koestler Awards budget (around £200k per annum) attributable to Londoners. This will include participants from establishments including London prisons, probation services and youth offending institutions. The total cost of this element is estimated to be £77,665 over three years, hence the revised request.

### **Financial Observations**

The Koestler Trust gets about 10% of its income from statutory sources. It relies year in and year out on a percentage of the art sales and, chiefly, on grants from charitable trusts for its running costs.

In 2011 the Trust made a larger than anticipated surplus because turnover grew by 10% because of many more entrants. This resulted in the Trust taking on additional staff, which is now reducing the overall level of reserves. At the end of 2011 free reserves amounted to 5.3 months of unrestricted expenditure which is in excess of the 3 months stated in the reserves policy. The trustees have planned to reduce the free reserves to 3 months' unrestricted expenditure by the end of 2012 and are working towards this target.

### **Officer's Appraisal**

The Koestler Trust enjoys a well-deserved reputation for the unique role it plays within the justice system. The involvement of offenders in art is widely recognised as both a calming influence and one that is helpful in an individual's overall rehabilitation. The art competitions and exhibitions are very popular and contribute greatly to the overall package of services available within prisons to help resolve issues within their lives.

### **Recommendation**

**£77,650 over three years (£25,250; £25,900; £26,500) towards the London element of the Koestler Awards.**



# The City Bridge Trust

Charity Registration Number: 1035628

Reference:  
(office use only)

11063

Date Received:

08/02/2012

Programme  
Area:

1106

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

14 FEB 2012

### 1. About your organisation

Name of organisation applying for grant: <b>Koestler Trust</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>Koestler Arts Centre 168a Du Cane Road London</b>	
Postcode: <b>W12 0TX</b> Is this your home address? <b>No</b>	
Contact person: <del>Ms Miriam Lewis</del> <b>Tim Robertson</b>	Position: <b>Chief Executive Development Officer</b>
Phone: <b>020 8740 6333 0606</b>	Fax:
E-mail: <del>mlewis@koestlertrust.org.uk</del> <b>TRobertson@koestlertrust.org.uk</b>	
Website: <b>http://www.koestlertrust.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1105759</b>	
Date organisation established: <b>01/01/1962</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive Transitions to Independent Living</b>
Purpose for which funds are requested: (25 words maximum) <b>Two-year Arts Worker employment contract at the Koestler Trust, and first year of following position: for ex-offenders resettling in London, with training and pastoral care.</b>
How much funding is requested? Year 1: <del>£30,000</del> <b>£30,306</b> Year 2: <del>£30,000</del> <b>£29,141</b> Year 3: <del>£30,000</del> <b>£29,992</b> Total: <del>£90,000</del> <b>£89,439</b>

### 3. Aims of your organisation

1. To help offenders, secure patients and detainees lead more positive lives by motivating them to participate and achieve in the arts.
2. To increase public awareness and understanding of arts by offenders, secure patients & detainees.
3. To be a dynamic, responsive organisation which achieves excellent quality and value for money.

### 4. Main activities of your organisation

We award, exhibit and sell artworks by offenders, secure patients and detainees. The Awards receive over 7,500 entries a year - inspiring offenders to participate in the arts and work for achievement. Our exhibitions attract over 20,000 visitors - showing the talent and potential of people in secure settings.

Entrants can submit artwork in 54 categories which are judged by high profile artists (eg. Grayson Perry and Emma Bridgewater). They receive participation or Award certificates, with higher levels of Award receiving prizes between £20 (bronze) and £150 (scholarship). Sales proceeds are divided between the artist (50%), Victim Support (25%) and ourselves (25%).

Our annual UK exhibition is held at Southbank Centre, curated by different groups involved in criminal justice, such as women prisoners and victims; for 2011 it was curated by magistrates in partnership with the Magistrates' Association. We run exhibitions across the UK curated by young offenders.

Our Arts Mentoring scheme matches Koestler-trained arts professionals with entrants. Mentees are offered 10 sessions over a year to develop and sustain their arts activity during their transition to the community.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
9	4	12	152

### 6. How do you support your volunteers?

We currently have 7 volunteers at our office including 2 serving prisoners from Downview Prison. We provide reasonable expenses for travel and food. We have 70 professional artists trained as mentors to work with offenders and 120 artists who come to judge the Koestler Awards.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	indefinitely - from the M.o.J.

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

**Year: 2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	510,931
Activities for generating funds	0
Investment income	0
Income from charitable activities	21,753
Other sources	0
<b>Total Income</b>	<b>532,684</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	516,070
Governance costs	7,571
Cost of generating funds	38,189
Other	0
<b>Total Expenditure:</b>	<b>561,830</b>
<b>(Deficit)/surplus for the year:</b>	<b>(29,146)</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	2,519
Investments	0
Net current assets (liabilities)	164,872
Long-term liabilities	0
<b>*Total A:</b>	<b>167,391</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	4,074
Unrestricted funds	163,317
<b>*Total B:</b>	<b>167,391</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**10%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**The 2011 Koestler Awards attracted 7,674 entries -- over 2,000 more than 2010. We had to take on additional staff and other resources to process all the artworks, and we had to spend some of our reserves. We had planned to maintain our reserves at around £160,000, but they are forecast to fall to around £90,000 by the end of the financial year at 31.3.12.**

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:			
Month/Year: 06/04	Ref: 0	Grant received: £5,000	OR application rejected? No
Month/Year:	Ref:	Grant received:	OR application rejected?
Month/Year:	Ref:	Grant received:	OR application rejected?

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009/10	Year: 2010/11	Year: 2011/12
(i)			
(ii)			
(iii)			
(iv)			
(v) National Offender Management Services	70,000	60,000	60,000
(vi) Youth Justice Board	0	9,000	0

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010/11	Year: 2011/12
Esmee Fairbairn Foundation	30,000	30,000
Paul Hamlyn Foundation	0	65,000
Peter Stebbings Memorial Charity	20,000	0
Tolkien Trust	30,000	25,000
Grants £18,000 & under 15, 13	90,250	63,350
Grants £1000 & under 24, 19	10,810	10,650

## 14. What steps is your organisation taking to reduce its carbon footprint?

Practices associated with our core activities have an environmental impact and we are committed to being as sustainable as possible. In June 2011 we received a grant from the City Bridge Trust's greening the third sector project for an eco-audit. The audit produced a report which favourably highlighted the work that we already do to be as environmentally conscious as possible as well as offering new ways to reduce our carbon footprint. Our office has a higher recycling rate than average and we use recycled packaging and frames wherever possible. We also have specific Koestler Awards for artwork made from recycled materials that is very popular with our entrants. The administrative side of the office is also becoming increasingly paper-free. We have drawn up a new environmental policy and plan of action based on the audit which will be presented to our Board of Trustees for approval in March.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

The majority of people leaving secure environments face difficulties with resettlement: only 36% of adults leaving prison going into education, training or employment (Bromley Briefings 07/11). One of the challenges for an ex-offender looking for employment is securing that initial job, where they can prove themselves and build a set of transferable skills. Coupled with the complexity of finding employment in the highly competitive world of the Arts finding employment can look almost impossible to an ex-offender.

At the Koestler Trust we are fully aware of these issues due to our experience of working with ex-offenders, offering two Ex-offender Arts Worker positions to people who are leaving custody and resettling in London. We are asking City Bridge Trust to fund one two-year position, and the first year of a second. The project provides employment in a secure, non-judgemental environment with training and pastoral care to help with their resettlement and career progression.

The positions will be advertised with Inside Time newspaper and London based prisons/probation areas. We will have an open day for interested individuals and provide expenses for up to 8 interviewees following the completion of application forms. We have a clear policy on employing ex-offenders; we need to know their offence and resettlement plan, we don't want to set anyone up to fail.

Arts workers will receive training in all aspects of their role, with additional support to suit their needs (such as IT classes). In the second year they will take on additional responsibilities such as managing volunteers or co-ordinating our annual art sale. Our Director of Outreach and Involvement will monitor pastoral needs, such as probation or housing issues and coach them in application writing and interview technique for future roles. This grant will also fund the first year of the next set of Arts Workers.

Aims:

1. Resettling offenders through employment and pastoral support.

Output: grant will give a 2 year employment contract to one London-based ex-offender with training and support.

Outcome: they will be resettled with skills and confidence; will have found their next role and be unlikely to reoffend.

2. Motivating offenders in the arts.

Outputs: artwork will be handled efficiently and all internal targets in regards to artwork entries, Awards, and returns will be met.

Outcomes: We will effectively respond to the needs of our service users, motivating them to positive achievement and rehabilitation.

3. Changing public perceptions of offenders for greater reintegration.

Output: quality exhibitions will be put on with high media coverage; the public will learn about our work through tours, art sales, talks and excellent customer service.

Outcome: the public will understand the humanity and circumstances of offenders. The work of the Koestler Trust will be promoted within the criminal justice and arts worlds.

4. Creating a model of best practice for employing ex-offenders in the arts.

Output: we will create a best practice policy on working with ex-offenders for small charities.

Outcome: policy will be made available to sister organisations, encouraging more ex-offender employment projects.

'Principles of good practice':

- We have a clear diversity policy; which recognises the many differences between people and seeks to ensure that everyone involved in the Trust maximises their potential whilst contributing to our work.

- We have over 120 volunteers including students, arts judges and mentors. We have had 17 serving prisoners from HMP Downview volunteering since 2009.

- We are implementing a new environmental policy based on the results of our eco-audit funded by City Bridge Trust.

We are offering a salary of £18,200 see the attached budget and job description for a full breakdown of all costs and responsibilities.



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Monitoring: The arts workers will have monthly meetings with their line manager to discuss progress and targets, and an appraisal after 6 months, enabling us to see how they are settling in. We can see how they have contributed to our aims through feedback from service users and our ability to reach our internal deadlines. After one year they will complete a questionnaire based on skills learnt and confidence, and will send one to their probation officer. This will be followed up after they have moved on.

Evaluation: The data collected will be used to assess what training (both internal and external) to offer the arts worker and help their line manager allocate more responsibilities and projects. A successful outcome would be to have a fully resettled ex-offender with the skills and confidence to move on to their next job, and a low chance of reoffending.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>2 + c. 5,000</b>			
In which local authority is your organisation based? <b>Hammersmith &amp; Fulham</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>All - we will be inviting job applications from ex-offenders resettling to the whole London area.</b>			
At what address will the activity be located? <b>Our office in West London, Exhibition venue at Southbank Centre</b>			
What age group will benefit? <b>All</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>x</b>
What proportion of the beneficiaries will be disabled people? <b>20%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Ex-Offender Arts Workers	41,656	42,697	43,765	128,118
Line management & training	3,006	3,081	3,158	9,245
Support & coaching	3,804	3,899	3,997	11,700
External training	1,000	1,000	1,000	3,000
Recruitment costs	240	0	240	480
New computer & desk (year 1 only)	3,000	0	0	3,000
Management & overheads at 15%	7,906	7,602	7,824	23,332
<b>TOTAL</b>	<b>60,612</b>	<b>58,279</b>	<b>59,984</b>	<b>178,875</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
Henry Smith Charity	90,000
Trust for London	90,000
Sir John Cass Foundation (for an under 25)	90,000
<b>TOTAL</b>	<b>270,000</b>

## 19. Funding requested from the Trust


How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Ex-Offender Arts Worker	20,828	21,349	21,882	64,059
Line management & training	1,503	1,541	1,580	4,624
Support & coaching	1,902	1,950	1,998	5,850
External training	500	500	500	1,500
Recruitment costs	120	0	120	240
New computer & desk (year 1 only)	1,500	0	0	1,500
Management & overheads at 15%	3,953	3,801	3,912	11,666
<b>TOTAL</b>	<b>30,306</b>	<b>29,141</b>	<b>29,992</b>	<b>89,439</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <b>14/05/2012</b>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>We are asking for City Bridge Trust to fund one two-year position and the first year of a second position. We are currently in the process of creating our next five-year development strategy through a multi-agency consultation. We are looking to expand our individual giving programmes and bring in new funders.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>N/A</b>

### Declaration on behalf of applicant organisation

I, <u>TIM ROBERTSON</u> (your name)
am an authorised representative of <u>THE KOESTLER TRUST</u> (your organisation)
within which I am <u>CHIEF EXECUTIVE</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u></u> Date <u>13 Feb 2012</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist - if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Whizz-Kidz**

**Ref: 11260**

**Amount requested: £65,752**

**Adv: Stewart Goshawk**

**Base: Westminster**

**Benefit: London-wide**

**Purpose of grant request:** To provide a residential camp each year, for disabled young people in London to gain the skills to aid their transition to adult life.

**Background**

Whizz-Kidz is the familiar name for the Movement for Non-Mobile Children. Its aim is to provide mobility-impaired children and young people with specialised wheelchairs to suit their individual needs, to train them to use this equipment to its fullest extent and to encourage each young person to live their life to the full. Whizz-Kidz is a well-known name in many charity circles – for example, it was the beneficiary of a recent BBC Blue Peter Christmas appeal and regularly has up to 400 people running on its behalf in the London Marathon.

One of the organisation's key features is its "Kidz Board" – a shadow board of directors wholly made up of young disabled people, who help devise strategy, undertake PR/media opportunities and generally help to oversee the whole organisation.

**Funding History**

The Trust's only previous grant to Whizz-Kidz was in 1999, when a three year award of £84,000 supported the costs of a mobility advisor. That grant was signed off long ago.

**Current Application**

This application is in connection with Whizz-Kidz life skills training programme for disabled young people. By coming into contact with children, sometimes at a very young age and seeing their development over the years, Whizz-Kidz has long been aware of the need to broaden the horizons of the young people they work with. Part of the solution to this is a national network of clubs for young people, funded through a large Lottery grant, where disabled young people are able to meet socialise and have fun in an accessible and supportive environment.

However, in 2010, the Kidz Board identified a gap in service provision to take this move towards developing independence further. In response, the organisation has developed a programme of short residential camps to help teach life skills, learn what it is like to go away without mum & dad and to get involved in everyday living tasks, such as shopping,

cooking, cleaning and developing key personal skills essential when starting to live an independent life – all of which helps to build each individual's confidence and self-esteem. Venues have included Treloar School, which provides the necessary high standards of accessibility. Some previous participants also return as mentors, whilst speakers are also invited to provide successful role models for young people who often start out with very low expectations of what they can achieve in life.

Whizz-Kidz employs some innovative techniques to gather feedback and evaluation, for example using a "Big Brother"-style diary room where each young person can talk openly about their successes and concerns. Many of the participants also stay in touch with the organisation long term, accessing other services – so progress is relatively easy to see.

### **Financial Observations**

In the year to December 2011, Whizz-Kidz had income of £5.8m, received through local government contracts, central government grants, many charitable donations large and small, as well as from a massive general fundraising effort. Members will note at Q8 the relatively high cost of generating funds. However, this investment more than pays itself back both in straightforward financial terms, as well as profile raising, creation of PR opportunities and securing of large statutory contracts.

Within its free reserves, Whizz-Kidz seeks to hold a designated fund of 25% of annual core costs to cover cyclical ups and downs, plus a service development fund (totalling £490k), In addition, the accounts also report a comparatively small sum of £249k, representing the unrestricted income received from its myriad fundraising activities during the last couple of weeks of that financial year and which will have been committed early in the new financial year. The budget for 2012, forecasts a small surplus of just 1.9% of income, based on a 20% increased turnover – but with lower costs of generating income.

### **Officer's Appraisal**

Whizz-Kidz is one of the main organisations providing services for children and young people who need a wheelchair to aid their mobility. This request will provide a residential opportunity for 12 mobility-impaired young people. The unit cost is recognised as high, but the support needs of many participants are significant. 24-hour, 1-to-1 support is the minimum staffing ratio and there is a deal of staff work in planning each trip with both the young people and, importantly, their parents, who often need considerable support themselves. However, costs could be shaved a little without detrimental effect.

### **Recommendation**

**£60,000 over three years, (3 x £20,000) towards the costs of life-skills training residential camps for 12 young mobility-impaired young Londoners per annum.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11260

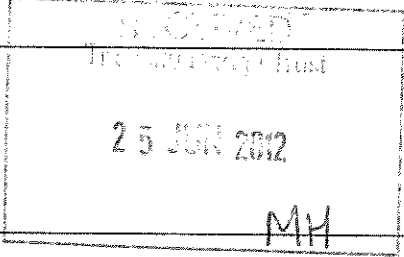
Date Received:

20/06/2012

Programme  
Area:

06

### 1. About your organisation

Name of organisation applying for grant: <b>Whizz-Kidz</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>4th Floor Portland House Bressenden Place London</b>	
Postcode: <b>SW1E 5BH</b> Is this your home address? <b>No</b>	
Contact person: <b>Mr Paul Melbourne</b>	Position: <b>Statutory and Trusts Fundraiser</b>
Phone: <b>0207 798 6126</b>	Fax: <b>0207 233 6611</b>
E-mail: <b>p.melbourne@whizz-kidz.org.uk</b>	
Website: <b>http://www.whizz-kidz.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>802872</b>	
Date organisation established: <b>01/11/1989</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive Transitions to Independent Living</b>
Purpose for which funds are requested: (25 words maximum) <b>To provide a residential camp each year, for disabled young people in London to gain the skills to aid their transition to adult life.</b>
How much funding is requested? <b>Year 1: £21,735 Year 2: £21,916 Year 3: £22,101 Total: £65,752</b>

### 3. Aims of your organisation

Whizz-Kidz is the UK's national charity dedicated to enabling disabled children and young people to get the right start in life. Our service is focused on meeting the needs of disabled children and young people through the provision of customised mobility equipment, wheelchair skills training, advice and information, life skills and campaigning to raise awareness of the issues facing young disabled people. Our work is very much user-led with our beneficiaries having vital input into the way the charity is run. Since 1990 we have enabled 13,500 disabled young people to gain their independence and lead active lives, yet there are an estimated 70,000 disabled young people that could still benefit from our services, and we can not stop until this need is met.

### 4. Main activities of your organisation

Provision of Appropriate Mobility Equipment: We provide the appropriate mobility equipment, not available on the NHS, which enables a disabled young person to gain their independence and lead an active life.

Wheelchair Skills Training: The right wheelchair is just the start, we ensure each disabled young person has all the skills needed to safely and independently get the best use out of their equipment. Skills include spatial awareness, negotiating different surfaces and road safety skills.

Ambassador Clubs: We have a network of 46 clubs across the UK where disabled young people can have fun, learn vital life skills and campaign on the issues affecting them as young wheelchair users.

Life Skills Camp: Residential camps for disabled young people of a transition age to receive vital life skills and training to help them aid their transition to adult life and access work and further education opportunities.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>74</b>	<b>9</b>	<b>12</b>	<b>400</b>

### 6. How do you support your volunteers?

We provide an induction and relevant training for all volunteers and ensure that they are offered support to gain new skills and experiences. All volunteers are reimbursed for their travel and lunch costs so they are not left out of pocket for their time.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Rented</b>	<b>Until 2014</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: December**

**Year: 2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	741,000
Activities for generating funds	1,400,000
Investment income	6,000
Income from charitable activities	3,713,000
Other sources	0
<b>Total Income</b>	<b>5,860,000</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	3,831,000
Governance costs	37,000
Cost of generating funds	1,901,000
Other	0
<b>Total Expenditure:</b>	<b>5,769,000</b>
<b>(Deficit)/surplus for the year:</b>	<b>91,000</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	115,000
Investments	162,000
Net current assets (liabilities)	1,219,000
Long-term liabilities	0
<b>*Total A:</b>	<b>1,496,000</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	642,000
Unrestricted funds	854,000
<b>*Total B:</b>	<b>1,496,000</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**20%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

**None**



## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	05/07	Ref:	8223	Grant received:	£0	OR application rejected?	Yes
Month/Year:	06/99	Ref:	4368	Grant received:	£84,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) Croydon Borough Council		27,995	37,327
Bexley Borough Council		13,320	
Haringey Borough Council			23,393
(iii)			
(iv) NHS Contracts	197,000	588,000	1,161,000
(v) Department for Education	109,000	107,000	166,000
Department of Health	19,000	40,000	101,000
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
The ACT Foundation	79,000	104,000
Garfield Weston Foundation	40,000	0
BBC Children in Need	118,000	120,000
Vodafone Foundation	0	73,000
Esmee Fairbairn Foundation	0	30,000
Grants of £10k or less	545,000	472,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

The charity has an environmental policy which states intentions and principles in relation to environmental performance, and also includes a commitment to continual improvement in an effort to reduce the environmental impact of the activities.

To achieve this commitment we will:

- Recycle
- Be aware of waste and work to reduce ours
- Reduce quantities of paper and electricity
- Improve efficiency of the resources we consume
- Encourage staff, volunteers and beneficiaries to adhere to our environmental policy

In our daily operations we will:

- Provide on-line forms and encourage electronic communications
- Travel by public transport where possible
- Recycle our toners and office paper
- Reuse our office supplies
- Shut off all printers, computers and lights when employees are not in the office

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

This application focuses on offering Life Skills Camps to disabled young people aged 14-25 in London. Life Skills Camp is a three day residential break for 12 disabled young people of a transition age to spend time away from their primary carers, often for the first time, and learn vital skills which can be used to access further education, work and independent living.

The impetus for Life Skills Camp came about when a member of our user involvement body of disabled children, the Kidz Board, highlighted that there were no suitable short break provisions in her area. Whizz-Kidz then surveyed our Ambassador Network (beneficiaries) in November 2010 to determine if this was a widespread experience and 79% of respondents felt that there were not enough opportunities for wheelchair users to go on residential breaks and learn independent living skills. 88% said they found it difficult to go on an overnight stay due to lack of appropriate support.

Since this urgent need was highlighted, we have successfully delivered seven Life Skills Camps, benefitting 71 disabled young people from London and the South East. In January 2012 we asked the parents/carers of these young people for their views and 90% of respondents thought Life Skills Camp would enable their child to feel more confident about living independently.

A typical day at Camp starts with a shopping and budgeting challenge followed by a session of life skills which will provide personal social development through learning about relationship building, problem solving, work skills and self awareness. In the afternoon there will be a series of activities including sports and drama as well as cooking for and hosting an end of camp party.

We would like to request the support of the City Bridge Trust over three years to deliver one of these camps each year specifically for disabled young people from London. Each camp will be delivered at a fully accessible venue selected by staff, such as Treloars School in Hampshire.

Whizz-Kidz has over 20 years experience of working with disabled young people and are the only provider of a short break Camp with emphasis on Life Skills for wheelchair users in the UK. We ensure that at camp all young people are fully supported and that their care needs are fully met. Each Camp will be supported by fully trained and CRB checked volunteers to help young people achieve their personal goals.

This aims of this project are:

- For 12 disabled young people at Camp each year to acquire increased life skills to support their growth and development into adulthood. These skills include building effective relationships, problem solving and teamwork.
- To provide disabled young people with the skills and confidence to assist their transition to independent living. Attending Camp and undertaking training in budgeting, shopping, cooking, wheelchair skills, and life skills training encourages young people to live more independently of parents and carers.
- For disabled young people at Camp to benefit from receiving work skills training including CV writing and interview skills. After Camp young people will be offered the opportunity to take part in a two week work Placement with one of our employer partners in a variety of sectors. This combination of support will offer these young people the skills needed to access paid employment.
- To ensure that the disabled young people benefitting from the project are involved in planning the content of the Camp to meet their individual needs and goals. Feedback from young people has previously, and will continue to be, fed into shaping the content and delivery of future Camps.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Whizz-Kidz staff and volunteers will support each young person throughout Camp so they can get the most benefit. There is a 'Big Brother' style diary room where young people can report on their progress towards their personal goals and ambitions, and evaluate their progress at the end of camp. After Camp feedback is also collected from volunteers, staff and parents. Parental feedback is also obtained a few weeks later and then six months after Camp a questionnaire is sent to all attendees to determine both the immediate and long term benefits.

This feedback is collated by Whizz-Kidz Life Skills Officer and a report is produced. The results of this are then shared with the Head of Youth Participation, who will evaluate the results against the planned objectives and against the objectives of the funder. Any learning from this evaluation will be used to improve and refine delivery of future Camps.

**17. Beneficiaries**

How many people will benefit from the grant per year? <b>12</b>			
In which local authority is your organisation based? <b>Westminster</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) <b>The opportunities are available to young people from all boroughs of Greater London.</b>			
At what address will the activity be located? <b>Treloars School, which is a fully accessible venue to meet the needs of all service users.</b>			
What age group will benefit? <b>All children &amp; young people, over 11 years, over 16 years (Aged 14-25)</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>
What proportion of the beneficiaries will be disabled people? <b>100%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Life Skills Officer, 0.15 Full Time Equivalent (FTE) (£33k + 12% NI + 6% pension)	5,841	5,958	6,077	<b>17,876</b>
Children and Young People's Training Manager 0.05 FTE (£38k + 12% NI + 6% pension)	2,242	2,287	2,333	<b>6,862</b>
Day - Care Nurses and Health Care Assistants	4,330	4,330	4,330	<b>12,990</b>
Night - Care Nurses and Health Care Assistants	1,510	1,510	1,510	<b>4,530</b>
Hoist and Equipment Hire	140	140	140	<b>420</b>
Venue, minibus and catering	5,866	5,866	5,866	<b>17,598</b>
Materials	200	200	200	<b>600</b>
Life Skills Tutors	450	450	450	<b>1,350</b>
Staff travel and volunteer expenses	200	200	200	<b>600</b>
Contribution to overheads, 0.20 FTE	956	975	995	<b>2,926</b>
<b>TOTAL</b>	<b>21,735</b>	<b>21,916</b>	<b>22,101</b>	<b>65,752</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Life Skills Officer 0.15 FTE	5,841	5,958	6,077	<b>17,876</b>
Children and Young People's Training Manager 0.05 FTE	2,242	2,287	2,333	<b>6,862</b>
Day - Care Nurses and Health Care Assistants	4,330	4,330	4,330	<b>12,990</b>
Night - Care Nurses and Health Care Assistants	1,510	1,510	1,510	<b>4,530</b>
Hoist and Equipment Hire	140	140	140	<b>420</b>
Venue, minibus and catering	5,866	5,866	5,866	<b>17,598</b>
Materials	200	200	200	<b>600</b>
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<b>TOTAL</b>	<b>21,735</b>	<b>21,916</b>	<b>22,101</b>	<b>65,752</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/01/2013</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>The charity has a fundraising strategy in place to meet Key Performance Indicator's as set out in the charity's operating plan, of which this project is a key part. We would endeavour to share positive feedback and learning, with other charitable trusts and corporate partners, to leverage funding to sustain the project in the future.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? n/a

### Declaration on behalf of applicant organisation

I, <u>Paul Melbourne</u> (your name)
am an authorised representative of <u>Whizz-Kidz</u> (your organisation)
within which I am <u>Statutory and Trusts Fundraiser</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u>P.M.</u> Date <u>22/06/2012</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

#### Please

- do not send this application by fax or e-mail - unless applying online, applications must be posted to the Trust
- do send the information in the checklist - if items are missing, your application will be returned to you
- do send only the information in the checklist - if further information is required, we will contact you
- do ensure you have signed and dated this form - we cannot accept forms which have not been signed and dated
- do use the correct postage - the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Positive Transitions to Independent Living**

**Kent Association for the Blind**

**Ref: 11210**

**Amount requested: £74,576**

**Adv: Jenny Field**

**Base: Bromley**

**Benefit: Bromley**

**Purpose of grant request:** The Assistive Technology Project, Bromley: Teaching people with sight loss how to use computers and the Internet to help them regain independence, choice and control

**Background**

Kent Association for the Blind (KAB) was established in 1920. Today, its mission is to enable visually impaired people to lead independent lives. It is the main provider of help and support for the visually impaired across Kent and in LB Bromley, where it also provides specialist support services. These include advice on eye conditions, specialist training and equipment to support independent living; independent living skills training for children; IT and daily living skills for adults; and a network of social and activity clubs that aim to reduce isolation.

**Funding History**

You approved a grant of £90,000 in April 2007 towards access improvements towards KAB's centre in LB Bromley. This grant has been satisfactorily monitored.

**Current Application**

This application seeks funding towards the salary of an Information and Assistive Technology Worker who will provide training in IT for blind and partially sighted people in LB Bromley.

Using its experience gained from working in Kent, KAB is requesting funding to employ an Information and Assistive Technology Worker to deliver IT training for blind and visually impaired people in LB Bromley with the assistance of volunteer tutors. The training would be delivered in small groups (maximum 6 students) at its Sight Centre in Bromley. Funding of £20,000 from the Mayor of Bromley has enabled an IT suite and training room to be established. One-to-one training in the home will be provided for those unable to get to the Centre due to mobility problems. As well as the training programme, there will be drop-in sessions held twice a week, where people can meet socially but also bring any IT issues or problems they may be experiencing and get support from their peers or from the Information and Assistive Technology Worker. Based on its past experience, KAB anticipates that it will train 80 people per year.

Service users who have benefited from the work in Kent say that as a result of the training, they feel less isolated and more confident and their sense of well-being has improved, leading to greater participation in new activities and networks which in turn help to increase a sense of independence.

### **Financial Observations**

The financial information provided in Question 8 of the application form relates to the 2010/11 audited accounts. Since then, draft accounts for 2011/12 have been obtained. There was a further planned deficit of £199,000 during the year which reduced the level of unrestricted free reserves from the previous year. The draft annual report for 2011/12 states that the target level of reserves the trustees aim to hold is approximately £1.2m. Free reserves as at 31<sup>st</sup> March 2012 amounted to £1.7m. KAB's budget for 2012/13 projects a further planned deficit of just over £300,000. These planned deficits are largely due with reductions from the three local authorities with whom it contracts - Kent County Council, Medway Council and LB Bromley, all of which have implemented spending reductions. Whilst its contract with Medway was renewed in October 2011 for three years (albeit it at a reduced level), the position with Kent and Bromley is far less secure. Its contract with Bromley runs out in April 2013 and with Kent in October 2013. The commissioning process in these two local authorities is still being developed but KAB anticipates that even if it successful in the tender process, funding will be at a reduced level. The trustees have also undertaken to meet the shortfall in the running costs of the application before you today (the applications to the Mercers' Company and Donald Forrester Charitable Trust were not successful). In the light of these considerations, especially the uncertainties around likely reductions in local authority funding, the level of reserves is not deemed excessive by your assessing officer.

### **Officer's Appraisal**

IT has the potential to play a vital role in supporting people who are blind or partially sighted with independent living. The benefits are manifold, including being able to scan and read personal correspondence without the need to ask for help; access to the Internet to get information ranging from a person's eye condition to available financial and consumer products; maintaining online contact with family and friends; and being able to make online applications or write letters. KAB has the necessary skills and experience to deliver this proposal.

### **Recommendation**

**£73,000 over three years (£24,000; £24,000; £25,000) towards the full-time salary of an Information and Assistive Technology Worker to develop training in the use of IT for blind and visually impaired people in LB Bromley.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11210

Date Received:

21/05/2012

Programme  
Area:

06

### 1. About your organisation

Name of organisation applying for grant: <b>Kent Association for the Blind</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>72 College Road Maidstone Kent</b>	
Postcode: <b>ME15 6SJ</b> Is this your home address? <b>No</b>	
Contact person: <b>Miss Sheena Brown</b>	Position: <b>Head of Fundraising</b>
Phone: <b>01622 691357</b>	Fax: <b>01622 663999</b>
E-mail: <b>sheena.brown@kab.org.uk</b>	
Website: <b>http://www.kab.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1062354</b>	
Date organisation established: <b>22/06/1920</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Positive Transitions to Independent Living</b>
Purpose for which funds are requested: (25 words maximum) <b>The Assistive Technology Project, Bromley: Teaching people with sight loss how to use computers and the Internet to help them regain independence, choice and control</b>
How much funding is requested? <b>Year 1: £24,809 Year 2: £24,516 Year 3: £25,251 Total: £74,576</b>



### 3. Aims of your organisation

Our mission is to help sight impaired people lead independent lives. Our objects are for the relief of blind and partially sighted people and the prevention of blindness, especially in the County of Kent, Medway and the London Boroughs of Bromley and Bexley.

We help children and adults of all ages and at any stage of their sight loss journey. We help those with additional learning disabilities and those with dual sensory loss (deaf blind).

We support over 11,000 people across the region with information, guidance, and practical rehabilitation support. This involves the supply of specialist lighting, magnification aides and safety gadgets for the home, mobility training, help with re-learning everyday tasks such as cooking and personal care, a network of social and activity clubs and a talking newspaper service.

### 4. Main activities of your organisation

KAB is the main provider of help and support for sight impaired people in Kent, Medway and Bromley and we also provide specialist support in Bexley. Our rehabilitation services include advice on eye conditions and information on living with sight loss. We offer the specialist training and equipment that can be crucial if blind people are to retain their independence and live a fulfilled and happy life.

We help children to become independently mobile, learn daily living skills like cooking and eating with cutlery, run activity days and give support and information to their parents.

We teach adults how to get out and about on their own with long cane training, offer support to enable people to stay in employment with IT training and also can help with relearning daily living skills like cooking, managing a household, personal care and developing different methods of communication. KAB also provides equipment provision such as effective lighting and safety gadgets.

We also have a network of social and activity clubs that help mitigate the terrible social isolation that sight impairment can bring.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
<b>40</b>	<b>82</b>	<b>13</b>	<b>892</b>

### 6. How do you support your volunteers?

All volunteers undertake full induction and training programme and are supported by Volunteer Co-ordinators who offer training, regular information updates and invitations to events to ensure they are thanked and kept in touch with organisational developments.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Owned</b>	

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended - **Month: March**

**Year: 2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	650,811
Activities for generating funds	33,315
Investment income	28,810
Income from charitable activities	1,767,630
Other sources	0
<b>Total Income</b>	<b>2,480,566</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	2,375,134
Governance costs	50,981
Cost of generating funds	179,538
Other	14,564
<b>Total Expenditure:</b>	<b>2,620,217</b>
<b>(Deficit)/surplus for the year:</b>	<b>(139,651)</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	1,188,756
Investments	1,519,399
Net current assets (liabilities)	779,744
Long-term liabilities	0
<b>*Total A:</b>	<b>3,487,899</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	336,046
Unrestricted funds	3,151,853
<b>*Total B:</b>	<b>3,487,899</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?

**50%**

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year: 12/06	Ref: 7842	Grant received: £90,000	OR application rejected?	No
Month/Year:	Ref:	Grant received:	OR application rejected?	
Month/Year:	Ref:	Grant received:	OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2010/11	Year: 2009/10	Year: 2008/09
(i)			
(ii) Bromley	131,693	119,921	116,536
(iii) Bexley	13,712	18,836	18,709
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2011/12	Year: 2010/11
WH & A Hawkins Trust	5,000	5,000
Cobtree Charity	3,500	3,500
Evan Cornish Foundation	3,000	
Inman Charity	3,000	
Souter Charitable Trust	2,500	
Carmen Butler Charteris Trust	2,000	

## 14. What steps is your organisation taking to reduce its carbon footprint?

We recycle paper at all offices and have a toner/print cartridge, mobile phone and stamp recycling scheme

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

KAB seeks funding to employ an Information and Assistive Technology Worker to deliver IT training programmes for blind and sight impaired people in Bromley using volunteer tutors. We believe that this will be the only project of its kind in Bromley. There are 2,490 registered sight impaired and severely sight impaired people in Bromley and Bexley and our Bromley rehabilitation team report feedback from clients, that they want to learn how to use a computer but don't know who can help them. KAB's Bromley Service User Forum have also asked KAB to provide IT training.

From IT training projects KAB delivers in Kent, we know that many clients have failed to learn IT successfully in mainstream education as they did not get the small group training required by tutors who were trained in teaching with the correct magnification and speech software and specialist adapted hardware.

The project will deliver tuition in small groups (of no more than six students), at our Bromley Sight Centre where a donation of £20,000 has enabled KAB to equip an IT training room. One to one tuition at clients homes will also be offered if independent mobility is an issue. Tuition will be delivered by trained volunteers alongside the project officer. Tuition will include touch typing, using a mouse, scanning documents, Word, email and Excel, using the Internet and apple software and i technologies.

The project will endeavour to achieve in year one:

1. Recruit and train up to 10 volunteers to act as tutors
2. Deliver up to 252 hours of formal training (six half day courses of six weeks)
3. Deliver two half day drop in sessions a week
4. Deliver one day per week home tuition
5. Train 80 people in year one

KAB has a successful track record in delivering IT training for over ten years so have the knowledge and expertise to launch this project in Bromley.

The project will help sight impaired people make the transition to more independent living and give them greater ability to exercise choice and control over their lives. It will do this by giving them equality of access to the Internet so clients can get information on their eye condition, other health issues, information on financial and consumer products, leisure pursuits and community activities; thus promoting greater freedom of choice, autonomy and ability to participate in their community.

It will enable people to improve their ability to communicate independently, exercise choice and have enhanced control over their affairs by learning how to scan and read bills and personal correspondence without resort to having to ask for help from a sighted person which can be intrusive. This will foster greater autonomy to manage household budgets, complete forms, paperwork, write letters and gain an enhanced sense of independence and achievement.

Feelings of isolation will be reduced by enabling independent communication by using email and also joining the online and social networking community. Training in apple software and sat nav apps will also encourage greater mobility and independence. Clients often report that as a result of the AT project, their mental well-being and confidence grows which encourages them to join KAB clubs and other activities in the community and help them be more independent. The IT skills gained will enable students to consider new opportunities in education, employment or volunteer roles.

Service users will be closely involved in the development of course content and monitoring and client feedback will enable continuous shaping of IT training. Volunteers are crucial to tuition delivery so will be trained to a high standard and have continuous support and development.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

We are implementing monitoring systems that will capture outputs and outcomes on key indicators such as improved communications against a numerical scale at the beginning, middle and end of interventions. Other outcomes to be monitored will include independence and autonomy prior to and on completion of the training. We will also measure how many service users move into education, voluntary role or employment following the training. We are also implementing service user self- assessment using similar scales. This will include assessing the impact of an increased quality of life for service users carers. The evaluation process will include evidencing the added value of our volunteers using questionnaires and telephone interviews with a random sample of service users on a quarterly basis. We use service user feedback forms for qualitative statements and case histories.

**17. Beneficiaries**

How many people will benefit from the grant per year?

*240 80 a year directly*

In which local authority is your organisation based?

**Bromley**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)

**Bromley and Bexley**

At what address will the activity be located?

**KAB Sight Centre, 18 Blyth Road, Bromley BR1 3RX**

What age group will benefit? **Adult**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?

**100%**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Recruitment & CRB check	1,000			1,000
Salary - Project Officer	21,798	22,451	23,124	67,373
ENI	2,011	2,065	2,127	6,203
Travel	2,000	2,100	2,205	6,305
Office set up	800			800
Mobile/Internet	180	180	180	540
training	600	250	250	1,100
Post, print, stationery, phone, office costs	850	850	850	2,550
Rent heat light	3,900	4,095	4,300	12,295
Volunteers Expenses	1,500	1,575	1,653	4,728
Contribution to over heads	5,280	5,280	5,280	15,840
Capital equipment - computers, scanners etc	20,000			20,000
<b>TOTAL</b>	<b>59,919</b>	<b>38,846</b>	<b>39,969</b>	<b>138,734</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Major of Bromley (all capital items/equipment)	20,000			20,000
Goldsmith's Company	3,000			3,000
<b>TOTAL</b>	<b>23,000</b>			<b>23,000</b>

What other funders are currently considering the proposal?

Funder	£
Mercers Company Charity	8,000
Donald Forrester Charitable Trust	10,000
<b>TOTAL</b>	<b>18,000</b>

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
salary - Project Officer	21,798	22,451	23,124	67,373
ENI	2,011	2,065	2,127	6,203
Recruitment costs	1,000			1,000
<b>TOTAL</b>	<b>24,809</b>	<b>24,516</b>	<b>25,251</b>	<b>74,576</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;"><b>01/10/2013</b></p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>Through developing a successful project with meaningful long-term outcomes, KAB we will make the case to the Local Authority that it should be eligible for mainstream funding. We will trial different contributory models for clients. There will be a contribution from community and general fundraising. We will recruit and train volunteers for sustainable training programmes.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached?

### Declaration on behalf of applicant organisation

I, <u>SHEENA BROWN</u> (your name)
am an authorised representative of <u>KENT ASSOCIATION A.K.A THE BLIND</u> (your organisation)
within which I am <u>HEAD OF FUNDRAISING</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u>Sheena Brown</u> Date <u>21/5/2012</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**Primetimers**

**Ref: 11255**

**Amount requested: £149,287**

**Adv: Tim Wilson**

**Base: Hackney**

**Benefit: London-wide**

**Purpose of grant request:** To provide skilled mentors who will provide financial management support to small third sector organisations.

**Background**

Primetimers was established in 2002 to match charities with mentors who have high-quality business skills. After two years running as a pilot project within another organisation, the Community Action Network (CAN), Primetimers was incorporated as a charitable company in 2004. Since then the Primetimers 'offer' has expanded to include low-cost consultancy, trustee placements, advice for would-be mentors, and contracted capacity-building services.

Although the organisation is run by a relatively small team of five part-time staff, its large mentor base (known as Members) means it can work with over one hundred organisations each year.

**Funding History**

You have not funded Primetimers directly before. However, in 2005 you awarded £40,000 over two years to CAN to hold funds on behalf of Primetimers who did not, at that point, have a year's worth of examined accounts. That award provided seed funding to establish the Primetimers service and to focus support on under-resourced black and minority ethnic organisations. Good monitoring reports were received on that award.

**Current Application**

Primetimers recently completed work on a national capacity building programme for the Department for Education. As part of that project the organisation developed a financial health check for smaller charities which cannot afford a dedicated Finance Director or which lack robust accounting skills on their trustee committee.

Primetimers is requesting funds to promote the scheme, help charities to identify the assistance they require, match them with an appropriate Member (who will then receive a nominal day rate), and monitor the scheme. Members are expected to spend up to four days with each charity working through the health check, and will write an action plan which will form the basis of Primetimers' monitoring. Follow-up mentoring will be available to the charities for up to 18 months.



The main part of this request is to cover the mentors' time. This is significantly below the standard day rate for voluntary sector consultancy, and is inclusive of travel costs. Primetimers will not charge the beneficiary charities any fee for this service.

### **Financial Observations**

Latest accounts show that Primetimers returned a small surplus of £1,710 whilst the budget for 2012-13 anticipates a further surplus of £22,132. The organisation does not have an explicit reserves policy, and your Officer discussed this with the applicant at the appraisal meeting where it was clarified that, aside from administrative costs (£166,893 in 2012), all other expenditure is discretionary. Primetimers held £67,460 in free reserve in 2012, an amount equivalent to five months of administrative costs, which is reasonable.

### **Officer's Appraisal**

At a time when infrastructure services are under increasing strain and generally need to charge for their time, Primetimers' proposal is for a scheme free to charities and which is tailored to those who operate with limited resources. Primetimers' takes care to vet its Members, ensuring they offer practical skills rather than just 'good will' and that they have a sound understanding of the day-to-day realities of voluntary sector life.

### **Recommendation**

**£148,000 over three years (£48,000; £49,000; £51,000) towards the costs of a financial management mentoring programme for small third sector organisations in London.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11255

Date Received:

15/06/2012

Programme  
Area:

07

### 1. About your organisation

Name of organisation applying for grant: <b>Primetimers</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: <b>CAN Mezzanine, 49 - 51 East Road London</b>	
Postcode: <b>N1 6AH</b> Is this your home address? <b>No</b>	
Contact person: <b>Mr Brent Thomas</b>	Position: <b>Chief Executive</b>
Phone: <b>020 7250 8335</b>	Fax:
E-mail: <b>brent@primetimers.org.uk</b>	
Website: <b>http://www.primetimers.org.uk</b>	
Legal status of organisation: <b>Company Limited by Guarantee</b>	
If registered, please give charity number:	
Date organisation established: <b>04/10/2004</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Strengthening the Third Sector</b>
Purpose for which funds are requested: (25 words maximum) <b>To strengthen small third sector organisations by improving financial management and, where appropriate, other areas that are key to running a healthy sustainable organisation</b>
How much funding is requested? <b>Year 1: £48,301 Year 2: £49,760 Year 3: £51,226 Total: £149,287</b>

### 3. Aims of your organisation

Primetimers provides charities, social enterprises, community and volunteer groups and other civil society organisations (CSOs) with the highest quality of experienced and fit for purpose executives and professionals to carry out consultancy, mentoring, project and interim management assignments. Through an emphasis on quality people we aim to help CSOs to change, adapt and grow so that they play an ever bigger role in the delivery of quality services to their beneficiaries. We have identified a number of specific needs for CSOs including financial management and are able to bring expertise to enable them to meet this requirement.

Primetimers also aims to provide the highest quality advice to individuals who are new to the sector. The advice ensures they are able to engage with CSOs in an ever more effective way. It also assists those who are entering a new phase in their life to continue to use their talents for the benefit of CSOs and society.

### 4. Main activities of your organisation

Primetimers provides consultants, interim managers, mentors, project managers and trustees. We are able to provide a range of flexible and appropriate solutions to meet the needs of CSOs. Our target client group is primarily small to medium not for profit organisations who are looking for cost effective quality support. We provide this through a pool of highly skilled professional "members" with backgrounds in a range of different skill areas including financial management. This model has also been used to support organisations to maximise the impact of grant funding through programmes funded by the Department for Education and the Department of Health.

We also have several proprietary tools and services that we have found especially beneficial with CSOs, such as:

- Organisational diagnostics and financial health checks to help CSOs to prioritise areas of performance that are in need of support and improvement
- Mentoring - to help more senior CSO staff to improve their performance
- Board recruitment - encouraging more retired professionals and business executives to become trustees

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	5	3	120

### 6. How do you support your volunteers?

Volunteers undergo an induction consisting of an information event and a one to one session. On-going support, development and networking is through theme based seminars, a monthly newsletter, specific workshops and partnering/shadowing a more experienced volunteer.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
<b>Rented</b>	<b>Rolling three months' notice</b>

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -

Month: **March**

Year: **2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	0
Activities for generating funds	0
Investment income	76
Income from charitable activities	432,142
Other sources	0
<b>Total Income</b>	<b>432,218</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	425,401
Governance costs	4,200
Cost of generating funds	0
Other	907
<b>Total Expenditure</b>	<b>430,508</b>
<b>(Deficit)/surplus for the year:</b>	<b>1,710</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	1,412
Investments	1
Net current assets	67,460
Long-term liabilities	0
<b>*Total A</b>	<b>68,873</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	0
Restricted funds	0
Unrestricted funds	68,873
<b>*Total B</b>	<b>68,873</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
60%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

N/A

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:

Month/Year:	01/06	Ref:	6414	Grant received:	£40,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	
Month/Year:		Ref:		Grant received:		OR application rejected?	

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v) Department for Education - YSDF contract	120,000	360,000	400,000
(v) Department of Health - H&SCVF contract	0	0	100,000
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011

## 14. What steps is your organisation taking to reduce its carbon footprint?

We are working towards being a paper free office. All paper is reused and then recycled. All waste that can be recycled is, including batteries, toner, printer ink cartridges etc. We are based in a shared resource office provided by CAN Mezzanine who drive a number of initiatives to reduce carbon footprint. The office has been fitted out with this in mind. Travel is always on public transport and conference calls are used regularly to prevent unnecessary travel. We source goods with environmental impact in mind. If you wish further information please read our Sustainable Development Policy.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

A healthy sustainable organisation is one that has clear knowledge and understanding of its financial situation; has an accurate and comparative view of the quality of its financial and accounting systems; has set objectives for continuous improvement of their financial reports and processes. With these in place it is able to withstand and respond to changing circumstances.

The Need.

Through our work with small to medium sized third sector organisations we have identified that a number require specific support with finance and accounting if they are to become healthy sustainable organisations. The organisations in this group have in common that they do not have access to professional expertise for identifying which areas of their financial and accounting management they should target for improvement and, due to their size, they are unable to recruit a qualified accountant. Many also lack a trustee with relevant accountancy experience.

What we propose to do.

We are proposing to focus on financial and accounting management for this type of organisation. We aim to provide two support services: financial healthcheck and access to a professional accountancy mentor. The financial healthcheck will provide a clear picture of an organisation's financial health and the strengths and challenges they face in managing their finances effectively. The output will be an agreed development plan. Each organisation will also have optional access to 5 days mentoring/support consultancy to assist the relevant senior person in implementing the financial management development plan.

If all organisations take up the offer of both a financial healthcheck and a financial mentor/consultant we will be able to work with 14 organisations per year. If the offer of a financial mentor/consultant is not taken up by all we will be able to increase the number of organisations receiving a financial healthcheck. In total we will have worked with between 40 and 50 organisations over the 3 year period.

The outcomes will be:

1. Better financial systems embedded in the organisation so that the organisation will have a clearer plan of how to improve their financial health
  2. Higher level financial skills embedded in the organisation
- The resulting organisation will be more financially robust.

We will therefore be meeting the priority area of strengthening the third sector by strengthening its financial skills and ability and moving it to be more sustainable.

Why Us?

Primetimers has extensive experience in providing capacity building support and has worked with a range of social enterprises and small to medium not for profit organisations. The quality of our work has resulted in us delivering this support as part of large scale contracts for the Department for Education and Department of Health including carrying out organisational diagnostics (ODTs) and financial health checks. We are probably the sector leader in the use of ODTs having completed over 150 of them in the last 2-3 years. Primetimers has a network of over 120 skilled and experienced business people who have operated at the highest levels of some of the biggest companies and are also passionate about contributing their skills and experiences to the third sector.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

Our outcomes for each organisation will be

- new and informed targets for improvement of their financial and accounting management
- the embedding of a higher level of financial and accountancy skills

We will evaluate these through asking each organisation to itemise their new targets and skills and ask the independent consultant to verify. We will take a snapshot of the organisation at the start and then again at the end of both the financial healthcheck and the mentoring/consultancy support.

We will carry out an evaluation for each organisation and at the end of each year we will analyse all the evaluations and produce a composite report. We will share the evaluation with the professionals who will undertake the work so that we can build improvements into the process.

**17. Beneficiaries**

How many people will benefit from the grant per year?			
<b>160</b>			
In which local authority is your organisation based?			
<b>Hackney</b>			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each)			
<b>All</b>			
At what address will the activity be located?			
<b>Primarily delivered at the premises of the chosen organisations and the offices of Primetimers.</b>			
What age group will benefit? <b>All</b>			
What will the ethnic grouping(s) of the beneficiaries be?			
	<b>%</b>		<b>%</b>
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>
What proportion of the beneficiaries will be disabled people?			
<b>10%</b>			

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Attracting and selecting the organisations to receive support	2,083	2,125	2,167	6,375
Financial healthchecks and financial mentors/consultants for 14 organisations each year	42,052	43,386	44,724	130,162
Monitoring & Evaluation costs	4,166	4,249	4,334	12,749
<b>TOTAL</b>	<b>48,301</b>	<b>49,760</b>	<b>51,225</b>	<b>149,286</b>

What income has already been raised? (List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

Funder	£
<b>TOTAL</b>	

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Attracting and selecting the organisations to receive support	2,083	2,125	2,167	6,375
Financial healthchecks and financial mentors/consultants for 14 organisations each year	42,052	43,386	44,724	130,162
Monitoring & Evaluation costs	4,166	4,249	4,334	12,749
<b>TOTAL</b>	<b>48,301</b>	<b>49,760</b>	<b>51,225</b>	<b>149,286</b>



## 20. Funding requested from the Trust (continued)

When will the funding be required? <b>03/09/2012</b>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? <b>Although this service is reacting to the current climate we anticipate that the activity could continue beyond the period if resourced by "intelligent volunteering". We will advise each organisation on where they might source such a volunteer and the specification they should use. We do not envisage the need for additional funding.</b>
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? <b>Not applicable</b>

### Declaration on behalf of applicant organisation

I, <u>BRENT THOMAS</u> (your name)
am an authorised representative of <u>Primetimers</u> (your organisation)
within which I am <u>Chief Executive</u> (your position)
<b>To the best of my knowledge, all the information that I have provided in this application form is correct</b>
Signature <u>[Signature]</u> Date <u>18/6/12</u>

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- do not send this application by fax or e-mail – unless applying online, applications must be posted to the Trust
- do send the information in the checklist – if items are missing, your application will be returned to you
- do send only the information in the checklist – if further information is required, we will contact you
- do ensure you have signed and dated this form – we cannot accept forms which have not been signed and dated
- do use the correct postage – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Strengthening the Third Sector**

**Migrants Rights Network**

**Ref: 11206**

**Amount requested: £99,728**

**Adv: Jenny Field**

**Base: Islington**

**Benefit: London-wide**

**Purpose of grant request:** To develop the awareness and capacity of migrant and refugee support organisations to engage with policy issues and undertake joint advocacy.

**Background**

Migrants Rights Network (MRN) was established at the end of 2006 to develop support for a rights-based approach to migration. It was set up as the result of its current Director, then an employee of the Joint Council on the Welfare of Immigrants, being seconded to the Barrow Cadbury Trust to research the needs of migrants in the UK which resulted in a report advocating for the need for a network in order to strengthen the capacity of migrant and refugee organisations.

MRN is a significant policy analyst, providing the secretariat of the All Party Parliamentary Group on Migration. It also runs a communications platform that includes a website with news, events, commentary and guest blogs, alongside other social media services; a programme of events for stakeholders in the migration field; and capacity building to support migrant and refugee organisations in engaging with policy issues.

**Funding History**

None

**Current Application**

You are asked to support MRN's work encouraging migrant and refugee organisations to engage with policy issues and to work together to get their message heard by those in authority. Many migrant and refugee organisations focus on delivering frontline services, often with scant resources, leaving little time or energy to engage in this work. Yet engagement at the policy level can help frontline organisations understand the causes of some of the needs of their respective client groups.

Following an introductory workshop held in each of the four quadrants of London, it is proposed to hold 12 workshops annually (three themes in each of the quadrants); an annual briefing paper on migration in London; online resources on how to successfully engage with others on issues of concern; and a video on the process of bringing groups together over

issues affecting those they represent. Currently, MRN's workshops are attended by 60 – 80 groups. If funding for this work is approved, proposed themes include how changes to health commission structures will impact migrant communities; housing issues and migrant communities; and the effects of changes to family migration law.

The workshops will enable the participating organisations to develop their capacity to engage with policy issues and give them opportunities to carry out collaborative policy related work with MRN. It will also allow MRN to improve its access to information from its constituents on what is happening locally in different parts of London.

### **Financial Observations**

MRN's annual report for 2010/11 states that it aims to hold a minimum of £40,000 as general reserves. As at 31<sup>st</sup> March 2011, free reserves amounted to £33,399 which equates to approximately 1.2 months' worth of total expenditure. The report also states that the organisation hopes to build its unrestricted funds by building a contribution to core costs into its applications for restricted funds. Management accounts for 2011/12 have since been obtained. These show an increase of income over expenditure of nearly £37,000 during the year, just over £19,500 of which was on unrestricted funds, thereby increasing restricted reserves to £53,000.

### **Officer's Appraisal**

MRN is a key BME infrastructure body providing a voice and a platform for organisations working with migrants and refugees. The application is a good fit with the 'Strengthening minority ethnic and refugee community organisations and encouraging their collaboration' strand of your *Strengthening the third sector* programme.

### **Recommendation**

**£99,000 over three years (£32,000; £32,500; £34,500) towards the part time salary (2.5 days) and associated running costs of a capacity building programme to enable migrant and refugee support organisations to work together collaboratively and to engage with policy issues that affect those with whom they work.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11206

Date Received:

16 May 12

Programme  
Area:

7

### 1. About your organisation

Name of organisation applying for grant: <b>Migrants Rights' Network</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence <b>Royal London House 22-25 Finsbury Square London</b>	
Postcode: <b>EC2A 1DX</b> Is this your home address? <b>No</b>	
Contact person: <b>Mr Don Flynn</b>	Position: <b>Director</b>
Phone: <b>020 7920 6422</b>	Fax: <b>020 7920 6491</b>
E-mail: <b>d.flynn@migrantsrights.org.uk</b>	
Website: <b>www.migrantsrights.org.uk</b>	
Legal status of organisation: <b>Charity and Company Limited by Guarantee</b>	
If registered, please give charity number: <b>1125746</b>	
Year and month organisation established: <b>December 2006</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Strengthening the Third Sector</b>
Purpose for which funds are requested: (25 words maximum) <b>To develop the awareness and capacity of migrant and refugee support organisations to engage with policy issues and undertake joint advocacy actions.</b>
How much funding is requested? <b>Year 1: £32,476 Year 2: £32,476 Year 3: £34776</b> <b>Total: £99,728</b>

### 3. Aims of your organisation

The main aim of MRN is to develop widespread support for a rights-based approach to migration.

Our specific objectives in the coming period (2012 - 2015) are:

- 1) To strengthen the capacity of migrant and refugee community organisations and supporters of migrants rights to influence policies that affect migrants
- 2) To foster a current of support for a rights-based approach to migration amongst politicians, decision-makers and other influencers
- 3) To identify and amplify evidence and messages which support the case for a rights-based approach to migration

### 4. Main activities of your organisation

Policy analysis: MRN carries out policy analysis and commentary to support the work of stakeholders with an interest in migration. These are published as briefings and blogs and analysed in events.

Communications: MRN runs the most popular communications platform on migration issues in the UK. This includes a website and newsletter with news, events, commentary and guest blogs. MRN also runs several social media services including facebook, twitter and a youtube channel.

Events: MRN runs a calendar of events with stakeholders in the migration field and beyond to widen our audience. These include a national network meeting, an annual TEDx event, workshops, lectures and film screenings.

Capacity development: MRN runs trainings and organises workshops to develop the capacity of MRCOs to engage with policy issues.

Advocacy initiatives: MRN carries out advocacy actions on specific issues by organising meetings with policy makers, presenting evidence and supporting groups to contact MPs.

Parliament: MRN is the secretariat of the All Party Parliamentary Group on Migration.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
6	1	8	1

### 6. How do you support your volunteers?

We run fixed term unpaid internships to support specific pieces of work in areas of interest to applicants. Internships have specifications with clear aims, supervision by staff members and paid expenses. Interns generally move on to paid employment.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Leased	June

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

Financial year ended -                      Month: **March**    Year: **2011**

<b>Income received from:</b>	<b>£</b>
Voluntary income	337,570
Activities for generating funds	
Investment income	411
Income from charitable activities	8601
Other sources	
<b>Total Income</b>	<b>346,582</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	341,435
Governance costs	6,502
Cost of generating funds	
Other	
<b>Total Expenditure</b>	<b>347,937</b>
<b>(Deficit)/surplus for the year:</b>	<b>(1,355)</b>

<b>Asset position at year end</b>	<b>£</b>
Fixed assets	3,169
Investments	
Net current assets	97,156
Long-term liabilities	
<b>*Total A</b>	<b>100,325</b>

<b>Reserves at year end</b>	<b>£</b>
Endowment funds	
Restricted funds	60,727
	<del>66,926</del>
Unrestricted funds	39,598
	<del>33,399</del>
<b>*Total B</b>	<b>100,325</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?

0

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

MRN will be moving premises in June 2012. New premises have been identified within 1 km of our present location and we are finalising the lease terms. MRN is beginning 2012-2013 without funding secured for the full budget. Grant applications have been made to secure the shortfall and contingency plans are in place in case they are not successful to finish the year on a balanced budget.

## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected		<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
Unbound Philanthropy	93,522	95,142
Barrow Cadbury Trust	86,000	66,250
Sigrid Rausig Trust	75,000	50,000
Joseph Rowntree Charitable Trust	40,819	30,615
Trust for London	24,534	29,669
Three grants of less than £15,000	25,111	9,206

## 14. What steps is your organisation taking to reduce its carbon footprint?

The Migrants' Rights Network has taken a series of steps to reduce our carbon footprint. A key element of this is the use of electronic media for communicating and disseminating information. Our newsletter is only available electronically and most of our documents have limited print runs with most distribution happening online. Internally, we are moving towards a cloud-based system to store our files and emails. We are also taking steps towards becoming a paper-less office. MRN uses a Wiki system to keep a log of activities rather than paper filing. The board of trustees has approved a cycle-to-work scheme for staff members and we have flexible working arrangements where staff can work some days remotely from home.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

Migrant and refugee community organisations often focus on delivering services with limited capacity to individual users. Their capacity has been eroded by the transition in funding from grants to commissioning and more recently by cuts. Many MRCOs do not engage in policy or campaigning work therefore failing to address the policies that in many cases create the need for their services. Collaboration and good evidence are essential to engaging effectively in campaigning and policy work. This project will bring together MRCOs in workshops to connect to each other and discuss common issues that will feed into collaborative campaigning and advocacy work.

The project has the following objectives: 1. To increase the awareness of migrant and refugee community organisations of the importance of the policy context on their work. 2. To increase the engagement of migrant and refugee community organisations in joint advocacy and campaigning on issues that affect their clients/members. 3. To develop a better picture of pressing issues for migrant communities in different areas of London. 4. To convey a) some of the information gathered through meetings and b) the process of bringing together groups, using video technologies.

The expected outcomes are: a growing number of London-based migrant and refugee community organisations are part of MRN's network and actively using policy resources; a growing number of London-based migrant and refugee community organisations actively taking part in collaborative advocacy and campaigning activities; key stakeholders have a better sense of what are the pressing issues for migrants in different parts of the city; different areas; stakeholders in MRN's network learn about the process of bringing together groups. The outputs include 12 workshops per year (three themes in four areas); one briefing paper on migration in London per year; online campaigning resources; a video on the process of bringing groups together.

The Migrants' Rights Network has been working for the last five years bringing together a diverse set of stakeholders with an interest on migration to further the rights of migrants in the UK. We have a strong relationship and track record of partnership work with a core group of migrant community organisations. We now want to extend this expertise to bring in a wider group of migrant community organisations to contribute in setting the issues, collecting the evidence and carrying out advocacy and campaigning actions to address some of the causes of the issues affecting their clients.

This project meets the Trust's aim because it fosters collaboration between migrant and refugee community organisations. MRCOs from a part of London will come together and discuss common issues. These will then be fed into wider campaigns with MRCOs from other parts of London. Beyond the collaborative work element, this project moves community groups beyond the provision of mutual support and welfare services to focus on advocating and campaigning on issues that will benefit their members.

The Migrants' Rights Network uses a host of methods to ensure that feedback from the organisations we work with shapes and improves our work. We collect feedback at events and carry out an annual survey with members as well as monitoring how our support resources are used.

The Migrants' Rights Network is all about promoting diversity emerging from the process of migration into London. We aim to promote inclusion and positive outcomes across communities through the language of rights. We promote sharing methodologies and resources for other third sector organisations to use. For this project, for example, using video as a tool will allow other third sector organisations to learn about collaborative actions. MRN is taking active steps to reduce its carbon footprint including embracing cloud technologies, remote working and joining a cycle to work.



**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

MRN collects monitoring and evaluation data in different ways, including monitoring numbers participating at events and using our website, collecting feedback forms at events, following up contact with participants, recording instances of media exposure and meetings with policy-makers, and carrying out an annual survey of members.

For this project, for outcomes related to increasing the policy work of community organisations and engaging in joint advocacy actions key indicators will be: new community organisations linked to MRN's network; number of organisations taking part in joint campaigns and advocacy actions; feedback from workshops; and feedback from survey on MRCOs using MRN's resources. For the outcomes on building a better picture of issues affecting migrants MRN will monitor interest amongst key stakeholders in the briefings coming out of the project.

Growth in participation of new MCOs in MRN's network, participation of MCOs in joint campaigns and actions and feedback from MCOs would indicate success for the programme's outcomes.

**17. Beneficiaries**

How many people will benefit from the grant per year? **150 organisations, each with a number of clients**

In which local authority is your organisation based?

**Islington**

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

**All boroughs.**

At what address will the activity be located? **In different addresses across London**

What age group will benefit? **All age groups.**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe) <b>Migrants generally</b>	<b>100</b>
Open to everyone			

What proportion of the beneficiaries will be disabled people?

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Workshops with MCOs 12 per year	3000	3000	3000	9000
Briefing reports (1 per year)	600	600	600	1800
Video editing	0	0	2000	2000
Project manager salary 2.5 days pw	19,465	19,465	19,465	58395
MRN Director (2 days per month)	4,855	4,855	4,855	14565
Volunteer costs	320	320	320	960
Office support overheads (15%)	4,236	4,236	4,536	13008
<b>TOTAL</b>	<b>32476</b>	<b>32476</b>	<b>34776</b>	<b>99728</b>

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
<b>TOTAL</b>				

What other funders are currently considering the proposal?

NA

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Workshops with MCOs 12 per year	3000	3000	3000	9000
Briefing reports (1 per year)	600	600	600	1800
Video editing	0	0	2000	2000
Project manager salary 2.5 days pw	19,465	19,465	19,465	58395
MRN Director (2 days per month)	4,855	4,855	4,855	14565
Volunteer costs	320	320	320	960
Office support overheads (15%)	4,236	4,236	4,536	13008
<b>TOTAL</b>	<b>32476</b>	<b>32476</b>	<b>34476</b>	<b>99728</b>

## 20. Funding requested from the Trust (continued)

When will the funding be required? **Sept/Oct 2012**

Is the activity to continue beyond the period for which funding is requested?

If so, how will it be resourced? **MRN is generally looking at diversifying its income stream through carrying out contracted work, selling services and encouraging donations from stakeholders who can afford it. In the future, these income streams would subsidise part of the current work. However, grant funding would also need to be secured.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **NA**

### Declaration on behalf of applicant organisation

I, **Don Flynn** (your name)

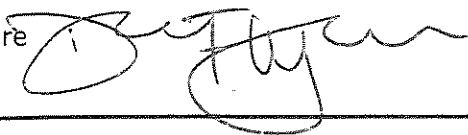
am an authorised representative of

**Migrants' Rights Network** (your organisation)

within which I am **Director** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date **11 May 2012**

**Return the completed form to: The City Bridge Trust**

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
- **do send the information in the checklist** – if items are missing, your application will be returned to you
- **do send only the information in the checklist** – if further information is required, we will contact you
- **do ensure you have signed and dated this form** – we cannot accept forms which have not been signed and dated
- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

**ASSESSMENT CATEGORY - Exceptional Grants**

**St John Ambulance**

**Ref: 11259**

**Amount requested: £117,740**

**Adv: John Merivale**

**Base: Islington**

**Benefit: Several NE  
London boroughs**

**Purpose of grant request:** To continue to provide and further develop training that seeks to encourage and support volunteerism amongst young people in four of London's most deprived boroughs.

**Background**

St John Ambulance (SJA) will be well known to Members, being the lead first aid charity in the UK. None but the most reclusive of our citizens spends even a year without benefiting indirectly from its services, as it has a reassuring presence at tens of thousands of public events throughout the calendar. It is a very substantial operation, with 1500 staff supporting a staggering 45,000 active volunteers providing 5.7 million hours of service per annum. SJA's main activities are to train the public in first aid and provide first aid at public events, together with back up to the ambulance service in times of emergency.

Perhaps surprisingly, it describes itself also as one of the country's leading youth development organisations. With over 27,000 members under the age of 25 and a youth development programme underpinning their volunteering, it is a major player in the field. Programmes are organised on a county basis, with most counties having dispersed voluntary youth teams supported by headquarters remotely.

**Funding History**

In July 2008 you awarded SJA £150,000 over three years for a programme of first aid training and youth development in the Olympic boroughs. That work was well reported on.

**Current Application**

The request is to develop this work for a further two years. Officers consider it to be of strategic value to London, and thus to merit consideration under your guidelines. The previous grant fell into your priority, now discontinued, of encouraging responsibility among young people. However, your officers believe this work is of sufficient importance for this application to be viewed as an exceptional grant.

Historically, SJA had low membership levels in inner London, despite recruitment drives. The lead-up to the Olympics provided a clear opportunity to recruit young people in the 'Olympic footprint' boroughs, and leave a legacy for SJA activity in those boroughs for years to come. It

established new units in Waltham Forest, Hackney, Newham and Tower Hamlets. The work has essentially two parts:

- 'Stick-it' is a first aid one-day training session, delivered in clubs and community centres. It gives a grounding in managing an incident and applying the most commonly needed first aid skills which have often proven to be the difference between a life saved or a life lost.
- Participants are then encouraged to take their skills forward by joining the 'RISE' project, a personal development programme including taught classes, interactive debates and 'hands-on' sessions. Modules in Essential Skills in Youth Work and Mentoring lead to a nationally recognised level 2 qualification.

Thus, young people are trained not only to save lives, but to become youth leaders. 52% of those engaged so far have gone on, from an empty start, to undertaking further education or entering employment.

SJA plans over the next two years to train 960 people in first aid and to see 160 of them progress to further training. It will ensure that 50 young people continue to volunteer with RISE and will establish eight new youth volunteer units.

### **Financial Observations**

SJA has a high turnover (£87m income in 2011) and consequently a high value of reserves but is also a unique national provider of key public service, with a varied income base – of which only 25% comes from statutory sources. Of the £125 million on the balance sheet, £92 million are fixed assets. SJA's policy is to maintain free reserves in the range £15–20m – barely three months' running costs. Current free reserves stand at £23.6m. Against this, however, SJA predicts a loss of £7.3m in 2012, which would bring the reserves within the policy range. These losses are due mainly to reduced voluntary income and lower yield from investments, coupled with higher expenditure on first aid training. SJA expects further loss in 2013, but has plans to break even again by 2014.

### **Officer's Appraisal**

This is a unique project which not only saves lives, but brings great personal development opportunities to participants. Research has shown that young people will join uniformed groups for very much the same reasons that encourage them to join gangs. The SJA has found that its Cadets uniform is very much a badge of honour, and the benefits of the youth programme are well demonstrated. You are asked to support the salaries of the Youth Development Officer and the RISE Project Manager. The request amounts to less than 50% of total costs, but is nevertheless a little high. A contribution of £50,000 per year would match your earlier grant, and SJA believes it would be able to find the balance elsewhere.

### **Recommendation**

**£100,000 over two years (£50,000; £50,000) to continue and develop first aid training and volunteering amongst young people in four east London boroughs.**



# The City Bridge Trust

Charity Registration Number: 1035628

## Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:  
(office use only)

11259

Date Received:

18 June 12

Programme  
Area:

11

### 1. About your organisation

Name of organisation applying for grant: <b>St John Ambulance</b>	
If the organisation is part of a larger organisation, what is its name? <b>N/A</b>	
Address for correspondence <b>National Headquarters 27 St John's Lane Clerkenwell, London</b>	
Postcode: <b>EC1M 4BU</b> Is this your home address? <b>No</b>	
Contact person: <b>Mrs Georgina Hennessy</b>	Position: <b>High Value Fundraising Manager</b>
Phone: <b>020 7324 4154</b>	Fax: <b>020 7324 4001</b>
E-mail: <b>Georgina.Hennessy@nhq.sja.org.uk</b>	
Website: <b>www.sja.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	10 35628  Box
If registered, please give charity number: <b>1077265</b>	
Year and month organisation established: <b>June 1887</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <p style="text-align: center;"><b>Please select one only - Exceptional Grant</b></p>
Purpose for which funds are requested: (25 words maximum) <b>To continue to provide and further develop training that seeks to encourage and support volunteerism amongst young people in four of London's most deprived boroughs.</b>
How much funding is requested? <b>Year 1: £58,000 Year 2: £59,740 Year 3: £N/A</b> <b>Total: £117,740</b>

### 3. Aims of your organisation

St John Ambulance is the difference between a life lost and a life saved. We are the nation's leading first aid charity with 2,000 members of staff and over 42,000 volunteers. Our mission is to:

- Ensure that no one loses their life because they needed first aid but did not receive it;
- Provide the nation's most comprehensive and best first aid training courses;
- Encourage personal development for people of all ages through training and volunteering; and
- Deliver exceptional community first aid projects through our national network.

### 4. Main activities of your organisation

Our main activities include:

- \* Training of the public in first aid, with emphasis on those sections of the community where it is most needed.
- \* Provision of first aid, pre-hospital care and assistance at public events and in local communities.
- \* Development of young people, both through our youth programmes and through first aid training in schools.
- \* Provision of transport in support of statutory ambulance service, especially in times of emergency and in circumstances where we can meet community needs.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1111	457	10	43000 <i>all</i>

### 6. How do you support your volunteers?

We produce a handbook that provides clear guidance on all issues a volunteer should expect to encounter including roles, grievance procedures, training opportunities and promotion. Volunteers have on-going supervision and annual appraisals.

### 7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Owned	

## 8. Finance

From your most recent audited or independently examined accounts, complete the following:

*All figures in 000's*

Financial year ended -

Month: **December**

Year: **2011**

<b>Income received from:</b>	<b>£ 000</b>
Voluntary income	14,125
Activities for generating funds	1,705
Investment income	976
Income from charitable activities	68,569
Other sources	1,648
<b>Total Income</b>	<b>87,023</b>

<b>Expenditure:</b>	<b>£ 000</b>
Charitable activities	85,901
Governance costs	739
Cost of generating funds	9,258
Other	
<b>Total Expenditure</b>	<b>95,898</b>
<b>(Deficit)/surplus for the year:</b>	<b>(8,875)</b>

<b>Asset position at year end</b>	<b>£ 000</b>
Fixed assets	90,337
Investments	23,825
Net current assets	15,428
Long-term liabilities	(4,676)
<b>*Total A</b>	<b>124,914</b>

<b>Reserves at year end</b>	<b>£ 000</b>
Endowment funds	563
Restricted funds	(131)
Unrestricted funds	124,482
<b>*Total B</b>	<b>124,914</b>

\* Total A and Total B must be the same and should be taken from your balance sheet

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
Approx 25%

## 10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:

A Statutory funding

Voluntary Income	420K
Event services/ Youth	500K
Ambulance Services	12,000K



## 11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: -	/ 2009	Ref: 8748	Grant received: £150,000	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

## 12. Previous funding received

Funding received by your organisation from the following sources during the last **THREE** years:  
**(i)** City of London (other than the City Bridge Trust) **(ii)** London boroughs **(iii)** London Councils (formerly ALG)  
**(iv)** Health authorities **(v)** Central government departments **(vi)** Other statutory bodies (e.g. Housing Corporation, Arts Council) - List source, years and annual amounts:

	Year: 2009	Year: 2010	Year: 2011
(i) Heritage Lottery Fund	142,000	1,328,000	269,000
(ii) Big Lottery	166,000	122,000	151,000
(iii) States of Guernsey	2,036,000	2,207,000	1,996,000
(iv) Newham PCT		10,000	12,000
(v) Lambeth PCT	73,000	68,000	61,000
(vi) DEFRA			28,000

## 13. Previous grants received

Grants received by your organisation from charitable trusts and foundations (other than the City Bridge Trust) during the last **TWO** years. List source, years and annual amounts:

	Year: 2010	Year: 2011
The Wellcome Trust	244,000	
Peacock Charitable Trust	12,000	12,000
Personal Assurance Charitable Trust	24,000	24,000
Rose Foundation	555,000	470,000
Edwina Mountbatten Foundation	10,000	
Haymills Charitable Trust	5,000	5,000

## 14. What steps is your organisation taking to reduce its carbon footprint?

We are currently undertaking a range of carbon reduction measures on a number of sites around the country, the aim of which is to develop our learning so that we can formulate a more detailed environmental policy for the entire organisation. Measures being adopted include:

- \* Use of solar PV panels on the roof of a regional unit.
- \* Grey water recycling scheme on a new build.
- \* Use of low energy bulbs and movement detectors to reduce electricity consumption.
- \* New electricity meters for a number of sites, to monitor consumption and devise methods to reduce consumption and wastage of electricity, including physical changes as well as educating users.
- \* Closing older energy inefficient buildings where it is uneconomical to upgrade them to make more energy efficient.

We also seek to minimise the use of paper by encouraging staff and volunteers to use email for document exchange. All printed materials are produced on recycled paper.

## 15. Purpose

Complete this section whatever the amount of grant requested. **In addition**, if the request is for £25,000 or more in total, a fuller proposal should be sent with this form. Also, if your application is for all or part of new or existing post(s), please enclose a copy of the relevant job description(s) including the salary level.

**In order to provide the right information, please refer to guidance note 15 before completing this section.**

1. **THE NEED** - In 2009, we at St John Ambulance (SJA) recognised that there were very few youth volunteers in the Inner London Boroughs. Our experience in other areas had shown that developing youth volunteer units not only encouraged community cohesion and provided young people with an avenue through which to channel their energies, but also equipped the young participants with a range of skills that improved their life chances and ultimately their employability. Over the last three years of delivering the RISE project, we have clearly shown the benefits of both learning first aid for hard-to-reach young people and of developing a new generation of volunteer youth leaders in the community. We are well on our way to providing a legacy of youth volunteers in these communities, and have developed relationships with many key local organisations. We now want to build on this, not only by continuing to offer RISE, but by further developing it so we can reach more individuals thereby increasing the volunteer base in these areas and ensuring that fewer lives are lost as a result of lack of first aid skills.
2. **THE PROJECT**- The RISE project has two distinct parts; The Stick-it course and the more comprehensive RISE programme. Stick-it is delivered in the local community by either a youth volunteer or a professional trainer. This one-day course provides a basic introduction to first aid with a focus on treating injuries caused by weapons, providing participants with the basic skills to save a life. Stick-it acts as a 'taster' to encourage participants to move onto the RISE programme which builds on this initial achievement by further providing the BTEC accredited 'Essential Skills in Youth Work' qualification as well as a range of other training opportunities including a course in keeping children safe and public speaking. 'Essential Skills in Youth Work' is the minimum qualification for a youth leadership role within the organisation, whilst the other opportunities enhance their knowledge and abilities as volunteers. Once trained, we provide opportunities for individuals to pass their new skills on to other young people. This could involve, among other things, delivering the Stick-it course. Delivering this course places the young leaders in a position of responsibility which increases self esteem and helps develop leadership and social skills. For the course participants it is good to see their peers in a position of responsibility, giving them something to aspire to and, as research has shown, encouraging a much more positive learning experience.
3. **INTENDED ACHIEVEMENTS** - Over the next two years we aim to:
  - Deliver first aid training to 960 young people, thereby encouraging a culture of community responsibility
  - Use the one-day first aid course as a 'taster' to encourage 160 young individuals to undertake further training
  - Ensure that 50 young people continue to volunteer with SJA beyond their engagement with RISE
  - Convert 55% of RISE participants from NEET to EET.
4. **WHY SHOULD SJA DELIVER THIS?**- We are the largest first aid training provider in the UK and a leading youth development organisation. We have over 43,000 volunteers in England, 42% of whom are under 18. 2012 marks the 90<sup>th</sup> anniversary of the founding of our youth section, formed to encourage young people to learn first aid skills and take up volunteering. We therefore have a long history of working with young people and intend to continue to encourage more young people from harder to reach groups to learn first aid and take their skills into their communities.
5. **MEETING THE TRUST'S OBJECTIVES** - This is, as advised by CBT, an application for an 'Exceptional Grant'. It is above all aimed at saving Londoners' lives, is working across more than one borough and, once scaled up, will be fully replicable across all London boroughs. The project, which has been developed in direct consultation with young Londoners, provides participants with access to new opportunities, enabling them to learn new skills, achieve a recognised qualification and become active volunteers in their communities. RISE values diversity, engaging hard-to-reach young people, those disengaged from mainstream education and training and those most likely to be affected by knife and gun crime. Seventy seven percent of participants on the RISE project in the last 3 years have come from BME communities.
6. **JOB DESCRIPTIONS** - Project Manager and Youth Development Officer JDs enclosed.

**16. Explain how you will monitor and evaluate both your own outcomes and those of the programme under which you are applying.**

As well as collecting statistical evidence including number of courses delivered, participant numbers, attendance records and qualifications achieved, we will facilitate feedback in the following ways: i) Monitoring forms; ii) One-to-one interviews with individuals engaged in the project; iii) Case studies; iv) Written questionnaires; vi) Evidencing meetings with partner agencies via minutes and correspondence.

In addition, the project utilises 'Hear by Right', the National Youth Agency's youth audit to provide evidence of youth participation and assess areas for improvement. Furthermore, each youth leader on the RISE programme will complete an on-going personal development plan which measures their personal development as well as their impact on the community. This is a means not only for participants to measure their own achievements and illustrates to them personally what they are capable of, but also enables us to monitor the effectiveness of the project.

**17. Beneficiaries**

How many people will benefit from the grant per year? **The project will directly benefit 480 young people per year**

In which local authority is your organisation based?

**Islington**

Which borough(s) of Greater London will benefit from this grant?

(if more than one, please give % for each)

**Waltham Forest (25%), Newham (25%), Hackney (25%) and Tower Hamlets (25%)**

At what address will the activity be located? **Different sites incl. community centres, youth clubs, SJA buildings**

What age group will benefit? **16 - 25 year olds**

What will the ethnic grouping(s) of the beneficiaries be?

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			<b>100</b>

What proportion of the beneficiaries will be disabled people?

**The project will be open and accessible to all.**

## 18. Funding required for the project

What is the total cost of the proposed activity/project?

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Staff (2 F/T)	58,000	59,740		
Staff (2 P/T)	31,100	32,000		
Staff training	2,500	2,500		
Stationary and printing costs	3,800	3,800		
Advertising	1,000	1,000		
Phones and IT	2,650	2,730		
Travel	2,900	2,990		
Postage	1,200	1,200		
Stick-it Training (24 events)	4,800	4,800		
Essential skills in youth work training	3,832	3,832		
Volunteer travel	4,800	4,950		
Training resources	1,760	1,760		
Other volunteer training	1,600	1,600		
Awards ceremony	1,000	1,000		
<b>TOTAL</b>	<b>120,942</b>	<b>123,902</b>		

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Metropolitan Police	10,000			
National Council for Voluntary Youth Ser	13,200			
Garfield Weston Foundation	10,000			
<b>TOTAL</b>	<b>33,200</b>	<b>00</b>		

What other funders are currently considering the proposal?

We are also in the process of applying to a number of other trusts and foundations to support this work including The Leathersellers' Charity Fund, Wessex Youth Trust and Henry Smith Charity.

## 19. Funding requested from the Trust

How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
RISE project manager F/T	32,000	32,960		
Community Youth Development Officer F/T	26,000	26,780		
<b>TOTAL</b>	<b>58,000</b>	<b>59,740</b>		

## 20. Funding requested from the Trust (continued)

When will the funding be required? **by September 2012, when our current funding from CBT comes to an end.**

Is the activity to continue beyond the period for which funding is requested?  
If so, how will it be resourced? **We envisage that this project, in one form or another, will continue beyond the period for which the funding is requested. We intend therefore, if this application is successful, to begin continuation fundraising 6 months before the CBT funding is due to come to an end.**

If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? **N/A as this is an ongoing project**

### Declaration on behalf of applicant organisation

I, **Georgina Hennessy** (your name)

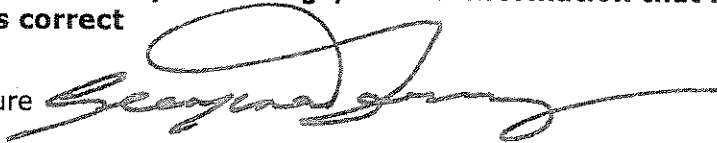
am an authorised representative of

**St John Ambulance** (your organisation)

within which I am **High Value Fundraising Manager** (your position)

**To the best of my knowledge, all the information that I have provided in this application form is correct**

Signature



Date

14/06/12

**Return the completed form to: The City Bridge Trust**  
City of London  
PO Box 270  
Guildhall  
London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
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