

ASSESSMENT CATEGORY - Older Londoners

Eye Music Trust

Ref: 11286

Amount requested: £87,556

Adv: Jenny Field

Base: Croydon

Benefit: Several London boroughs

Purpose of grant request: To design and build a new colour/music sensory space for those with Dementia which will be used for a series of workshops and concerts in care homes.

Background

Eye Music Trust was originally established as the Nettlefold Trust in 1989, until it changed its name and re-incorporated as the Eye Music Trust during 2005. It aims to bring contemporary music and arts to the widest possible audience. Through its educational programmes, it seeks to broaden participation in the arts through the exploration of colour, light, sound and movement.

It is best known for its *Colourscape* installation which has taken place on Clapham Common for the past 18 years. This consists of large-scale sculptural labyrinths of up to 95 linked chambers, occupying one acre of ground. It is difficult to convey on paper the impact of this remarkable and possibly unique project but the interplay of light, colour, sound and movement is extraordinary. Children with profound and multiple disabilities respond especially well to the stimuli and demonstrate enormous pleasure and engagement with the experience.

Funding History

In April 2008, you approved a grant of £30,000 over three years towards the construction of a new mobile Colourscape and the cost of taking it to special needs schools across London. This grant came to an end in May 2011 and has been successfully monitored. This work has since been assimilated into the charity's core activities.

Current Application

Following a successful pilot in three care homes in LB Barnet, it is proposed to run a series of workshops for people with dementia using a specially constructed, portable, sensory space in which light, colour and music can be experienced. In addition, one full Colourscape day will be held each year in suitable care homes (that is, those with sufficient outdoor space!).

Using the computer-music system developed with your previous grant, whereby people can trigger sensors by using movement or pressure so

that they can make music regardless of their disability, new software was created using snatches of well-known music which could be played using iPads. This was used to create a reminiscence project in the care homes. The workshops culminated in the residents performing in a concert for their friends and family – the first time any of them had given a public performance. Their relatives were delighted to see them transformed from passive recipients of services into active and engaged participants.

The effects of the workshops on the residents were remarkable, with those who had appeared withdrawn coming to life and those who were agitated becoming calmer. As one resident put it, "I do not feel tormented any more." A care home Manager reported that residents slept better after taking part.

Building on the success of this pilot, it is proposed to roll out the workshops in care homes across London. A new, portable, colour/music sensory space will be constructed, consisting of lycra fabric "sails" that can be put together in different configurations in order to create a soft, welcoming space within the room. iPads will be used to control the lighting and music that will be used.

Financial Observations

The financial information provided in Question 8 of the application form is taken from the charity's 2011/12 accounts. The surplus of £2,900 represented 1% of turnover. A surplus of just over £12,000 is projected for 2012/13.

Eye Music Trust does not currently have a reserves policy. This was raised by your officer during the assessment and the trustees will ensure that one is developed during the coming year. Free reserves of £37,386 as at 31st March 2012 represented just over 1.5 months of expenditure in the year. Whilst lean, these are considered a sufficient cushion given the charity's low overheads. Its main core funder is the Arts Council which in 2011/12 granted £101,617 and which has approved further funding for three years to 2014/15. The charity only runs projects for which it has raised funds.

Officer's Appraisal

The work of Eye Music Trust appears to be remarkably effective in engaging people – young and old – who might not otherwise participate in artistic activities. Its use of colour and light seems to result in an increased sense of well-being for participants, thereby increasing their quality of life.

Recommendation

£87,500 over three years (£36,300; £25,600; £25,600) towards the construction of music/colour sensory space and for a series of workshops in care homes benefitting those with dementia.



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)

11286

Date Received:

05/07/2012

Programme
Area:

05

1. About your organisation

Name of organisation applying for grant: Eye Music Trust	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: 100 Colourscape Way London E14 3JF	<p>RECEIVED The City Bridge Trust 13 JUL 2012 MH</p>
Postcode: E14 3JF Is this your home address?	
Contact person: Mr. Simon Desorgher	Position: Projects Director
Phone: 020 7474 1000	Fax:
E-mail: simon@colourscape.org.uk	
Website: http://www.colourscape.org.uk	
Legal status of organisation: Company Limited by Guarantee	
If registered, please give charity number: 1113190	
Date organisation established: 05/05/1999	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Older Londoners
Purpose for which funds are requested: (25 words maximum) * Designing and building a new colour/music sensory space for those with Dementia * Running series of workshops and concerts in care homes
How much funding is requested? Year 1: £36,256 Year 2: £25,650 Year 3: £25,650 Total: £87,556

3. Aims of your organisation

EYE MUSIC Mission Statement

Eye Music aims to bring contemporary music and arts to the widest possible public.

By creating new environments and using public spaces we attract all to our events through curiosity.

By linking music, colour, light, space and movement we give new dimensions to public perception and new understanding of contemporary music and performing arts.

Through educational programmes we seek to broaden participation in the arts through natural enjoyment and exploration of colour, light, sound and movement.

4. Main activities of your organisation

The most well-known activity of Eye Music Trust is our Colourscape Music Festivals. These take place within very large inflatable, walk-in labyrinths of colour. A typical festival has several days of contemporary music and dance and several days of colour and music workshops with particularly emphasis on Special Needs work for many schools across London.

Our educational activities include one-day Colourscape workshop events in our new dedicated workshop environment (funded by City Bridge Trust and Arts Council). These enable the most disabled children to take part as the "mobile" Colourscape is installed on a school site anywhere in the UK.

Our computer-music workshops use the latest sensor technology and specially-created software so that any child can create music whatever their disability. These workshops always end with public performances by the students.

Other events include Art Gallery installations of colour, light and music and these have led to our latest research and development into the benefits of computer and sensor-controlled colour and music for and by the elderly with dementia.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	3	7	0

6. How do you support your volunteers?

Our organisation is not suitable for regular teams of volunteers as Colourscape teams are specially trained and responsible for the public safety. Events within schools and other centres often involve volunteers from parents and/or assistants who we encourage to take forward the learning experience.

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	Eye Music owns 4 Colourscapes

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	
Activities for generating funds	2,173
Investment income	
Income from charitable activities	273,846
Other sources	14,398
Total Income	290,417

Expenditure:	£
Charitable activities	282,664
Governance costs	1,824
Cost of generating funds	3,000
Other	
Total Expenditure	287,488
(Deficit)/surplus for the year:	2,929

Asset position at year end	£
Fixed assets	50,482
Investments	
Net current assets	37,636
Long-term liabilities	
*Total A	88,118

Reserves at year end	£
Endowment funds	
Restricted funds	50,482
Unrestricted funds	37,636
*Total B	88,118

* 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?
38%

10. Material changes

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

There are no material changes to our organisation's activities. The only change has been to the Arts Council's core funding programme which is now called National Portfolio Organisation. We were successful in bidding to this for a three-year funding grant 2012-2015. Our organisation was very fortunate (in this period of cuts) - gaining funding without any cuts in our revenue funding.

11. Previous applications to the Trust

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

Month/Year:	10/08	Ref:	8670	Grant received:	£30,000	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)	2009:Croydon £2800, Bexley £7500 Croydon £2000, Wandsworth £10600, Croydon £2000, Bromley £1000 Well London £10600 Ealing £6500	10,300	4,000
(iii)	LONDON COUNCILS	4,078	12,600 17,100 24,465
(iv)			
(v)			
(vi)	Arts Council England	100,904	118,238 119,649

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
PRSF	7,000	0
Rawsthorn Trust	4,000	4,000

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

Our organisation is already very "green". We have no permanent premises as Colourscape is packed away when not in use. So there is no heating of our "premises". Colourscape itself (when in use) is very energy efficient and when fully-inflated uses little electricity to maintain its pressure.

Our administrators work from home mainly communicating by email and phone. The main administrator has a policy of re-using paper and envelopes for notes and letters.

The Colourscape team travel in the same van that transports Colourscape (compressing travel and fuel costs). Most of our workshop leaders travel by train or bike whenever possible.

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 Eye Music Older Londoners Colour/Music project aims to improve life-quality for Older Londoners with Dementia and Alzheimers. We also aim to help these people lead healthier and more active lives through active participation in music-making.

BACKGROUND

In 2007 we were successful in bidding to City Bridge Trust and Arts Council England to build a new "mobile" Colourscape - designed to take our unique colour and music workshops directly to Special Needs schools across London. The three-year City Bridge grant also helped lever additional funds from London Councils increasing numbers of workshops to 18 London boroughs across three years. These workshops were a great success thanks to the new Colourscape - able to be installed quickly on school sites so that every disabled child took part - extensive colour/light areas and dedicated music area.

This programme continues with funding from new charities and foundations.

DEVELOPMENT OF OUR COLOUR/MUSIC PROGRAMME FOR OLDER LONDONERS

We have been encouraged to look at developing our work to a new group of needy Londoners - those with various forms of Dementia and Frailty - through meetings with care-home providers who have seen our successful colour/music work.

We believe that every person should be fully active in their expression and enjoyment of the arts at every time of their life. Those with Dementia have been shown to greatly benefit from colour and music.

To assess whether our Special Needs programme would transfer to Older People with Dementia we ran a development and research programme during Autumn 2011 to see how we needed to change and adapt our work to suit these participants.

We ran three trials funded through our own reserves:

1. A full day of Colourscape and music workshops
2. A week of computer music and sensor workshops with final concert
3. A week of computer-music and our new colour Sensory Space

Full trial results are in our detailed Project Proposal. Briefly, we found Colourscape difficult due to lack of open space near care homes. Our computer-music programme was very successful - but the most successful research stage was development of a new computer-controlled colour/light/music environment - flexible and installed within any care home where all specialist help is on hand.

THE FULL PROGRAMME

As a result of our detailed research we propose to build a new kind of colour/music Sensory Space. This can be installed in a care home or any environment where older people with Dementia can experience it. The new Sensory Space is constructed from fabric screens with supports and can be moulded into any room or inside space. LED primary-coloured lights are controlled by infra-red sensors and iPads to mix all the colours of the rainbow. These also control music. The whole experience is of an creative artistic-musical space controlled by the Older People themselves. The participants create and control their own music using themes with Reminiscence. At the end of the workshop period we stage a concert in the Care Home for relatives and other residents to increase self-esteem and value.

OUR OBJECTIVES -

- * INCREASING QUALITY OF LIFE *Outcomes - In each year we present one Colourscape workshop day and 8 full weeks of Sensory-Space workshops in London care homes providing new experiences.
- * SELF-ESTEEM. *Outcomes - We present final concerts for relatives and carers.
- * WELL-BEING *Outcomes - Monitoring by carers on greater mobility - better sleep etc.
- * CREATIVITY *Outcomes - new compositions created by participants - assessed by carers.

Eye Music is the most experienced organisation working in this unique field and best placed to present this project

FULL DETAILS IN OUR ATTACHED PROJECT PROPOSAL

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

We always ask our participating organisations and beneficiaries to complete evaluations which are quantitative and qualitative. This process has already started with extensive and specific evaluations of our research and development stage. The Alzheimers specialist at Rubens House gave very specific evaluation which has helped us to shape the proposed new structure. This evaluation has been both practical and helped us to see the real benefits to the participants.

Positive comments from specialists involved include:

"One person with severe sight loss, was caught up in the atmosphere and was waving her hands around. She looked like she didn't have an impairment at all. It liberated her"

"It was fantastic for relatives to see a performance at the end of the week which was completed by all"

Resident's comment "I do not feel tormented any more"

A sense of calmness has been reported continuing after the project ended.

17. Beneficiaries

How many people will benefit from the grant per year?

700

In which local authority is your organisation based?

Croydon

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

We will expect to be running the project in at least 6 boroughs annually (c.50% of London boroughs benefitting by project-end).

At what address will the activity be located?

In Dementia care homes. Colourscape workshops in grounds - Sensory Space within care-homes.

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

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			100

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 £
Physical Installation design and build - CAPITAL	7,540			7,540
Purchase of computer software (writing, lights, sensors) CAPITAL	16,316			16,316
Colourscape seating - CAPITAL	200			200
Project management (capital element) - 12.5% - CAPITAL	3,000			3,000
One day Colourscape workshop	3,450	3,450	3,450	10,350
Through The Looking Glass workshops - 3 weeks	9,450			9,450
Through The Looking Glass workshops - 8 weeks		25,200	25,200	50,400
Note: Full cost breakdown of the above items are included in the detailed project proposal				
TOTAL	39,956	28,650	28,650	97,256

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Arts Council England NPO grant	3,700	3,000	3,000	9,700
TOTAL	3,700	3,000	3,000	9,700

What other funders are currently considering the proposal?

Funder	£
TOTAL	

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 £
Capital expenditure detailed above	27,056			27,056
One day Colourscape workshop	3,450	3,450	3,450	10,350
Through The Looking Glass workshops	5,750	22,200	22,200	50,150
TOTAL	36,256	25,650	25,650	87,556

20. Funding requested from the Trust (continued)

When will the funding be required?

30/11/2012

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced?

Eye Music Trust has been very successful at raising funds to continue projects. Our Special Needs project funded by City Bridge has raised continuation funds from Aiming High, ACE and various foundations. During the three-year Older Londoners' programme we will research new funds to establish similar continuation.

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

No planning or other consents are required.

Declaration on behalf of applicant organisation


I, SIRAN DESORGHIEL (your name)

am an authorised representative of

EYE MUSIC TRUST (your organisation)

within which I am PROJECTS DIRECTOR (your position)

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

Signature  Date 10-7-12

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 - Older Londoners

Hackney Caribbean Elderly Organisation

Ref: 11311

Adv: John Merivale

Amount requested: £37,775

Base: Hackney

{Revised request: £53,145}

Benefit: Hackney

Purpose of grant request: Our project is focused on providing a Memory Group service for elderly people with Dementia operating every Friday from 9am - 2pm.

Background

Hackney Caribbean Elderly Organisation (HCEO), provides a variety of social and cultural activities and health support. It operates three days a week from a building in Stoke Newington which it rents from the local authority and shares with an organisation providing for the Asian community. Specific activities include an Advocacy and Outreach project, morning exercise classes, health advice, outings and events, and a lunch club.

Funding History

None.

Current Application

HCEO ran a memory project in partnership with the Alzheimer's Society, for two years from March 2010, with funding from the Primary Care Trust. This funding has now ceased, and HCEO wishes to re-start the project.

The need for this project arises from the high number of Caribbean elders in Hackney – around 4,000 – many of whom arrived as young people in the wave of immigration that began with the Windrush in 1948. For reasons unknown, the prevalence of Dementia appears to be higher among the African-Caribbean population and around 1,200 people are believed to be affected. Moreover, some of this community find it difficult to engage with mainstream services and some may be ostracised by their own families.

The project would include reminiscence work facilitated by a specialist from the Alzheimer's Society, along with information about the medical and psycho-social aspects of Dementia – the intention being to assist families and carers as much as the elders themselves. HCEO expects to be able to track the results of the work through questionnaires and conversational feedback.

HCEO requested funding for two years only, because this would match the period of other funding for the project secured from Lloyds TSB

Foundation, and it was anxious over asking for more. Your officer advised that a request for three years would be reasonable in this case – hence the revised request, included as Appendix A.

Financial Observations

HCEO is supported by the local authority, Lottery funds, other charitable foundations, and member subscriptions. It carries a modest team of only one full-time and two part-time staff. In the current climate of scarce funding, the Chairperson has been filling the role of Chief Officer on a voluntary basis, while the organisation expects to adjust its financial planning in line with new local authority commissioning arrangements.

In the year ending 31st March 2012 a surplus of £8,400 (5.4% of turnover) was achieved. It has produced a balanced budget for the 2012/2013 financial year.

Free unrestricted reserves held at 31st March 2012 equate to 2.8 months' expenditure. HCEO has not explicitly stated a reserves policy in its accounts, but has agreed to clarify this in accounts for future years.

Should you agree a grant today, it is recommended this be subject to sight of a satisfactory budget for the year 2013-14.

Officer's Appraisal

It is clear that HCEO is well embedded in its local community, has a good understanding of the problems of Dementia, and is well placed to deliver this work – which has additional support from the Alzheimer's Society. The organisation has submitted a revised request covering three years and which is detailed at Appendix A.

Recommendation

£53,150 over three years (£15,000; £18,800; £19,350) for a project to address Dementia among the African-Caribbean community, subject to sight of a satisfactory organisational budget for the financial year 2013 -14.



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)

11311

Date Received:

23 July 12

Programme
Area: 5

1. About your organisation

Name of organisation applying for grant: Hackney Caribbean Elderly Organisation	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence 39 Leswin Road, Stoke Newington, London	
Postcode: N16 7NX	
Is this your home address? Yes	
Contact person: Mr Victor McAllister	Position: Chairperson
Phone: 0207 923 3536	Fax: 0207 923 3536
E-mail: hackneycaribbean@btconnect.com	
Website: www.hceo.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1057603	
Year and month organisation established: May 1985	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Older Londoners
Purpose for which funds are requested: (25 words maximum) Our project is focused on providing a Memory Group service for elderly people with Dementia operating every Friday from 9am - 2pm.
How much funding is requested? Year 1: £14700 Year 2: £23075 Year 3: £ Total: £37775

3. Aims of your organisation

Hackney Caribbean Elderly Organisation (HCEO) is a Day Service provided for Caribbean Elders residing in Hackney which runs on Tuesdays, Wednesdays and Thursdays. Established 25 years ago HCEO provides a variety of social and cultural activities as well as health support. HCEO aims to raise the standard of life of some of the borough's most 'hard to reach' Senior Citizens and does so in a professional manner, providing an empowering and safe environment. It is through access to HCEO services that many users are able to address challenges in their lives and continue living independently. HCEO is currently experiencing higher demand for its services and is striving to respond to that demand.

4. Main activities of your organisation

We supply a Luncheon Service for our members via a Hackney Council contract for the past eighteen years. We also run an Advocacy and Outreach Project which has been of great help to many of our members which includes such services as Welfare Rights Information and House Bound Visits. In addition we provide morning exercise classes for the chair-bound on Tuesdays and Thursdays, exercise for the mobile in partnership with Hackney Community College on Wednesdays, an Arts and Crafts Workshop every Wednesday afternoon, regular Day Trips, an Annual Holiday, regular Blood Pressure Checks and Discussion workshops in partnership with various other organisations including Social Action for Health, Diabetes UK and BEMWG.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	2	6	12

6. How do you support your volunteers?

By providing induction training, a volunteer manual, volunteers meetings and supervision, plus additional individual support such as assistance with c.v. writing, college materials and experience.

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	Currently being renewed

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	113,211
Activities for generating funds	16,585
Investment income	3,262
Income from charitable activities	21,638
Other sources	750
Total Income	155,446

Expenditure:	£
Charitable activities	143,827
Governance costs	3,219
Cost of generating funds	
Other	
Total Expenditure	147,046
(Deficit)/surplus for the year:	8,400

Asset position at year end	£
Fixed assets	2,360
Investments	
Net current assets	36,495
Long-term liabilities	
*Total A	38,855

Reserves at year end	£
Endowment funds	
Restricted funds	5,114
Unrestricted funds	33,741
*Total B	38,855

* 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?
43%

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: -	/ -	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) LBH Contract			£66,960
(ii) Big Lottery Fund			£10,390
(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
Zurich Community Trust		£1,149
Lloyds TSB Foundation		£25,000

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

Double-sided printing, viewing on screen as opposed to printing wherever possible, using resources (electricity, gas etc.) only when needed and recycling wherever possible.

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.

HCEO has three specialised departments that work to serve the needs of our service users. These are Advocacy and Outreach, Day Services and Mental Well-being. The Mental Well-being department operated a Memory Group service for the elderly with Dementia and their carers. It was started in partnership with the Alzheimer's Society at the end of March 2010 with twice a month sessions. This was reduced to a once a month session in March 2011. Unfortunately this funding has now ceased.

More and more of the Windrush (1948) and post-Windrush migrants are now presenting with Dementia. The Caribbean population of Hackney represents fifteen per cent of the population and hence the increase in the numbers presenting with Dementia. Traditionally the majority of Caribbean elders do not engage with the mainstream services due to fear of not being understood and their previous negative experiences of engagement with these services. This leads to isolation and increased health problems. This is even more acute for those with Dementia as they can also be ostracised by their own family and community.

The Social Care Research Unit research states that 1.4% of 64-69 year olds, 4.1% of 70-74 year olds, 5.7% of 75-79 year olds, 13% of 80-84 year olds and 21.1% of those who are 85 and above have Dementia. There are approximately 4000 Caribbean elders in Hackney. This therefore approximates to 1200 Caribbean elders with Dementia in Hackney. (using 2001 Census Statistics)

The current statutory process is a 12 week diagnosis and re-ablement period before being assigned to a Social Worker. This project aims to provide a 4-6 month period to help the person with dementia and their family and/or carers to come to terms with the condition and to develop a support plan to enable engagement with their local community and thereby the wider society. It will also provide a twice a month day service for those people who are past this stage and are unable to gain acceptance in other centres.

The project will provide information about the medical and psychosocial aspects of Dementia to emphasise the importance of speaking openly about problems. The recognition of the individual's problems and social acceptance is essential in this. Therefore the project will promote social inclusion for elders with Dementia by preventing them from becoming isolated.

The project would operate on Fridays with a different group of up to 20 being accommodated on different Fridays of the month equating to approximately 80 per month. Therefore group A would attend on the first Friday of the month, group B on the second Friday of the month, and so on. Two Fridays a month would focus on the newly diagnosed i.e. just out of their 12 week diagnosis and re-ablement. The other two Fridays would focus more on those that have had a 4-6 month support period with the project but have not been able to gain a placement as yet in a day service.

Our funding request is to cover the cost of the project except the Project Co-ordinator, Session Facilitator, Volunteer expenses and Training in the first year and part of the Project Co-ordinator salary in the second year. The Project Co-ordinator (part-time - Thursdays and Fridays) will co-ordinate the activities required to operate the project. These include managing the relationship with external agencies, suppliers and clients as well as being responsible for developing and managing each session.

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

- We will track the number of volunteers recruited each year and through questionnaires and 1-1 interviews we will measure their increased levels of skills and confidence.
- We will monitor the number of clients using our service and feedback from our clients will show that they feel they have improved access to support.
- We will provide before-and-after questionnaires to enable the monitoring of improvements for our service users.
- We will make records of observations made by volunteers, facilitators and the Project Co-ordinator of service users.
- Notes will be made of review by the project staff and visiting consultants of service user's progress.
- The project will also be part of the HCEO monitoring and evaluation program that is reported to the management committee every six weeks and in our Annual Report submitted to stakeholders, funders and the Charity Commission.

17. Beneficiaries

How many people will benefit from the grant per year? 200			
In which local authority is your organisation based? Hackney			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Hackney			
At what address will the activity be located? 39 Leswin Road, Stoke Newington, London, N16 7NX			
What age group will benefit? 60+			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British		Black - Caribbean	95
White - Irish		Black - African	5
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			Yes
What proportion of the beneficiaries will be disabled people? 40%			

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 Project Co-ordinator	12320	12320		24640
Session Facilitator (2hrs @ £15.50ph)	1550	1550		3100
Volunteers expenses	2500	2500		5000
Training at £100 per person per session	600	200		800
Food (£80 per session)	4000	4200		8200
Recruitment	500	500		1000
Transport with HCT	6200	6510		12710
Administration and Management	2500	2625		5125
Venue Hire (£15ph)	1500	1500		3000
TOTAL	31670	31905		63575

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Zurich Community Trust	1149			
Lloyds TSB Foundation	25000			
TOTAL				

What other funders are currently considering the proposal?

The Sobell Foundation, The Morris Charitable Trust, The Fuserna Foundation, The Tudor Trust, The Garfield Weston Foundation and The Childwick 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 £
Salary Project Co-ordinator	0	3690		3690
Session Facilitator (2hrs @ £15.50ph)	0	1550		1550
Volunteers expenses	0	2500		2500
Training at £100 per person per session	0	0		0
Food (£80 per session)	4000	4200		8200
Recruitment	500	500		1000
Transport with HCT	6200	651		12710
Administration and Management	2500	2625		5125
Venue Hire (£15ph)	1500	1500		3000
TOTAL	14700	23075		37775

20. Funding requested from the Trust (continued)

When will the funding be required? As soon as possible
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes, via donations and funding applications
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, Victor McAllister (your name) am an authorised representative of Hackney Caribbean Elderly Organisation (your organisation) within which I am Chairperson (your position) To the best of my knowledge, all the information that I have provided in this application form is correct Signature  Date 20/07/12
--

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

18. Funding required for the project

Appendix A: Revised request

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 Project Co-ordinator	12,320	12,320	12,320	36,960
Session facilitator (2 hrs @ £15.50)	1,550	1,550	1,550	4,650
Volunteers' expenses	2,500	2,500	2,500	7,500
Training at £100 per person per session	600	200	200	1,000
Food (£80 per session)	4,000	4,100	4,200	12,300
Recruitment	500	0	0	500
Transport with HCT	6,200	6,510	6,800	19,510
Administration and Management	2,500	2,625	2,750	7,875
Venue Hire (£15 ph)	1,500	1,500	1,500	4,500
TOTAL	31,670	31,305	31,820	94,795

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total
Zurich Community Trust	1,150			1,150
Lloyds TSB Foundation	12,500	12,500		25,000
Garfield Weston	3,000			
TOTAL	16,650	12,500		29,150

What other funders are currently considering the proposal?

Applications to: Sobell Foundation, Morris Charitable Trust, Fuserna Foundation, Tudor Trust, Childwick Trust – but without success.

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 Co-ordinator	1,770	0	0	1,770
Session facilitator (2 hrs @ £15.50)	1,550	1,550	1,550	4,650
Volunteers' expenses	0	2,320	2,320	4,640
Training at £100 per person per session	0	200	200	400
Food (£80 per session)	4,000	4,100	4,200	4,300
Recruitment	500	0	0	500
Transport with HCT	3,200	6,510	6,800	16,510
Administration and Management	2,500	2,625	2,750	7,875
Venue Hire	1,500	1,500	1,500	4,500
TOTAL	15,020	18,805	19,320	53,145

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

National Autistic Society

Ref: 11252

Amount requested: £97,000

Adv: Jenny Field

Base: Islington

Benefit: Several London boroughs

Purpose of grant request: To help young people with autism during their transition from school into adulthood.

Background

Established in 1962, National Autistic Society (NAS) is the UK's largest charity for people living with autism. It has 20,000 members, 100 volunteer branches and supports over 100,000 people each year through its helplines, schools and community services.

Funding History

You have funded NAS on several previous occasions. In November 2003 you awarded a grant of £180,000 over three years towards work to encourage take up of services by families from BME communities. You awarded a further grant of £150,000 over three years in February 2008 towards a training programme for parents. This grant came to an end in March 2011 and has been satisfactorily monitored.

Current Application

Funding is requested to enable NAS to help young people with autism during the transition from school into adulthood, as a two year pilot. According to NAS's needs analysis, only 53% of young people are given a transition plan during their education and adult social services were involved in just 17% of cases. Young people with autism are rarely involved in the process with many reporting that they had not expressed their opinions because they did not understand many of the questions asked of them. As a result of poor transition planning, many young people with autism fail to reach their true potential. Only 15% of adults are in full-time employment and 40% live with their parents. Fewer than 1 in 4 young people with autism continue their education beyond school while 61% of adults rely on their families for financial support.

It is proposed to establish the pilot in Sybil Elgar School, one of six specialist schools run by NAS across the UK. Based in Ealing, its students are drawn from across London. It offers primary, secondary and further education, as well as residential care. The approach would then be rolled

out to all NAS schools nationally and would be offered to other education providers catering for young people on the autistic spectrum.

In each of the two years, 70 young people with autism, aged 14 – 19 years, will be supported in the development of their transition plans that will increase their access to education, training and employment opportunities. 10 volunteers will be recruited and trained as Transition Advocates to support families and young people through the transition by offering one to one support for up to a year. A wide range of resources and information will be developed as an education transition toolkit for families. The pilot will be overseen by an advisory group with representatives from organisations working with young people on the autistic spectrum and young people with autism and their carers.

Financial Observations

The financial information provided in Question 8 of the application form is from the audited accounts for the year ended 31st March 2012. The surplus of £5.3m for the year represents 5.8% of turnover.

NAS's trustees have agreed a reserve policy which aims to hold £7m as a risk reserve and a further £1m as a designated local authority pension scheme reserve. In line with this policy, a risk reserve of 6.8m and a designated pension scheme fund of £1.0m were held at 31st March 2012. The latest forecast for the current year to 31st March 2013 projects a surplus of £1.9m (2.1% of turnover).

Officer's Appraisal

As the UK's largest charity for people living with autism, NAS is well positioned to implement this important project. During the assessment meeting, it was acknowledged that at the end of two years, NAS might not be fully in a position to roll the programme out nationally, and it may therefore approach the Trust for a third and final year's contribution, depending on the progress made with the pilot. In the assessment meeting, your assessing officer also explained that in the case of large charities such as NAS, your current policy is to fund 50% of the total project costs. As a result, NAS has prepared a revised Question 19 based on this criteria and this is provided at Appendix A.

Recommendation

£81,000 over two years (43,500; £37,500) for the salary of a Transitions Support Co-ordinator and some running costs of a pilot project helping young people make the transition from school to adulthood.



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)

11252

Date Received:

14/06/2012

Programme
Area:

06

1. About your organisation

Name of organisation applying for grant: National Autistic Society	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: 393 City Road London	
Postcode: EC1V 1NG Is this your home address? No	
Contact person: Ms Nikki Rummer	Position: Senior Trusts Officer
Phone: 020 7923 5766	Fax:
E-mail: nikki.rummer@nas.org.uk	
Website: http://www.autism.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 269425	
Date organisation established: 17/05/1962	

10 JUN 2012
MH

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) To help young people with autism during their transition from school into adulthood.
How much funding is requested? Year 1: £50,000 Year 2: £47,000 Year 3: £0 Total: £97,000

3. Aims of your organisation

The National Autistic Society provides help and support to people with autism. We seek to reduce the social isolation and exclusion experienced by children, adults and families affected by autism. By providing specialist education, training and support, we empower people and families living with autism to increase their independence and choice throughout their lives.

We aim to:

- **Provide** outstanding, person-centred education and training to people with autism, through every stage of their life
- **Connect** people, families and professionals affected by autism, to share their experiences and learning
- **Improve** access to up-to-date information, advice and support
- **Change policy** to reflect and meet the needs and aspirations of people with autism and their families, at a local and national level

Autism is complicated and can challenge us all. But 50 years of living with autism has given us a strong level of understanding. Our work is grounded in our extensive experience of front-line delivery, research and the voices of people with autism.

4. Main activities of your organisation

The National Autistic Society is the UK's largest charity for people living with autism. We have 20,000 members, 100 volunteer branches, and support over 100,000 people each year through our helplines, schools and community services.

We provide tangible benefits: including education in a child's early years through to employment opportunities and emotional support as they grow older.

But we aspire to much more. By training professionals and partnering with local authorities, we improve people's understanding of autism throughout whole regions. We work with teachers, health professionals and volunteers to create networks of care and support.

A selection of our projects:

Helpline -- we receive 64,000 enquiries on our helpline every year. We give an average of 20mins to each parent, social worker or adult with autism who we reach.

Befriending -- Our volunteer befrienders give a few hours of their time each week to help over 200 families each year.

Schools - We run six autism-specialist schools across the UK and we work closely with local authorities to improve mainstream education for children with autism.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1,906	1,511	11	1,000

6. How do you support your volunteers?

Volunteers receive on-going support over the phone, email and meetings with project coordinators to help them engage and support people with autism. Volunteers are further recognised through our Awesome For Autism awards scheme and Community magazine. We are currently working towards Investors in Volunteers status.

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	Approximately 9 years

8. Finance

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

Financial year ended - **Month: March**

Year: 2012

Income received from:	£
Voluntary income	7,955,000
Activities for generating funds	226,000
Investment income	155,000
Income from charitable activities	82,111,000
Other sources	41,000
Total Income	90,488,000

Expenditure:	£
Charitable activities	82,590,000
Governance costs	377,000
Cost of generating funds	2,258,000
Other	0
Total Expenditure:	85,225,000
(Deficit)/surplus for the year:	5,263,000

Asset position at year end:	£
Fixed assets	22,812,000
Investments	0
Net current assets (liabilities)	16,087,000
Long-term liabilities	-13,375,000
*Total A:	25,524,000

Reserves at year end:	£
Endowment funds	0
Restricted funds	4,987,000
Unrestricted funds	20,537,000
*Total B:	25,524,000

* 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?

90%

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:	11/07	Ref:	8696	Grant received:	£150,000	OR application rejected?	No
Month/Year:	08/03	Ref:	4125	Grant received:	£180,000	OR application rejected?	No
Month/Year:	09/01	Ref:	1911	Grant received:	£90,000	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: 2009	Year: 2010	Year: 2011
(i)	Haberdashers Company The Mercers' Company Charitable Foundation	10,000	10,000	10,000
(ii)	London Borough of Ealing London Borough of Brent London Borough of Hammersmith & Fulham	1,063,946 1,196,535 307,350	1,068,400 1,700,862 376,227	1,089,433 1,864,356 391,663
(iii)				
(iv)				
(v)	Department of Health Department for Education	75,786 110,283	137,799 68,355	55,731
(vi)	Welsh Government The Parenting Fund	52,000 160,289	53,396 103,850	54,000 85,458

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
Sir Jules Thorn Charitable Trust	100,000	
The Wolfson Foundation	60,000	
Garfield Weston	50,000	
The Bailey Thomas Charitable Fund		50,000
The Three Guineas Trust	45,000	45,000
354 grants less than £40k	305,713	270,910

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

In line with our environment policy, we aim to reduce waste and prevent pollution during the course of our work. Practical steps include: reducing travel by using online and telephone conference facilities to conduct meetings between stakeholders over large geographical areas; encouraging staff to shut down PCs and monitors instead of leaving them on standby; discouraging unnecessary printing; and encouraging cycling and walking to work.

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

The National Autistic Society has identified inadequate support for students with autism leaving secondary school:

- Children are not receiving transition plans: only 53% of young people are issued with transition plans during their education.
- Lack of engagement by local authorities: adult social services were involved in transition planning in just 17% of cases.
- Inadequate involvement of young people with autism: People with autism tell us they fail to express their true thoughts because they do not understand the meaning of questions asked.

As a result of poor transition planning, many young people fail to realise their potential: only 15% of adults with autism are in full time employment and 40% live with their parents

How the work will be delivered

The project will empower children with autism and their parents to navigate the transitions process:

1. 1-to-1 Volunteer Advocates will 'buddy' with young people to identify needs and aspirations as they prepare to leave school. They will inform parents of their rights and help them liaise with local authorities.
2. Involving teachers and local authorities: project staff will bridge gaps in communication, smoothing the transition from children's services to adult social care
3. Helpline service: New transitions information packs and tailored advice for parents and carers will be provided to callers.

We will pilot the project over two years in our Sybil Elgar school, Ealing. We aim to replicate the programme in future periods to our schools nationwide and to support teachers in mainstream schools across the UK.

Objectives

1. 70 young people with autism, aged 14-19, will receive timely transition plans, increasing access to education, training and employment opportunities and autism-specific services
2. The parents of 70 young people will be reached by volunteer advocates and information packs, increasing awareness of benefits and entitlements.
3. 70 young people will be included in decision-making about transition plans, increasing confidence and ability to manage change-related anxiety
4. 490 parents will become more informed of transitions support through their use of the helpline

Why we are the right organisation

Sybil Elgar School is one of six specialist schools run by the National Autistic Society across the UK. We also provide specialist adult services, catering for all levels of need, from 'light-touch' social groups to 24-hour residential care. With this breadth of experience, we can leverage a meaningful dialogue between children's services and adult social care/further education during transition. We understand the challenges faced by young people, parents, teachers and local authorities and we bring the expertise to pull these players together to produce inclusive transition plans for each child with autism.

Our strong partnerships with local authorities, decision makers and autism organisations enable us to share learning and influence wider practice. Our collaborators include Autism Education Trust, All-Party Parliamentary Group on Autism and Autism Research Reference Group, York University.

Positive Transitions to Independent Living

1. Disabled people report increased choice and control

By spending time with each young person, volunteers will develop trust and understanding to meaningfully involve their 'young buddy' in transition planning, increasing their choice and control over their futures.

2. Young disabled people take up opportunities

Young people and parents will receive tailored support for accessing employment, third-tier education, housing and social groups.

Principles of Good Practice

Involving service users: As a membership organisation, people with autism are involved in planning, delivering and evaluating our projects

Valuing diversity: In line with our equal opportunities policy, we recruit volunteers from underrepresented groups including BME and young people. We hold the Two Ticks Disability Symbol and have held Investors in People status since 2001.

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

Outcome 1 -- Timely transition plans: Records about the development of transition plans will be kept by the project coordinator, in collaboration with teachers and local authority officials

Outcome 2 -- Increasing parents' awareness: Families will be asked to complete feedback forms following their involvement in the project

Outcome 3 -- Increasing young people's confidence and ability to manage anxiety: Monitoring & feedback forms will be completed by young people with autism and/or volunteers to assess change

Outcome 4 - Informing via our helpline/rights service: Interviews with a sample of callers

Trust priority -- Increased choice and control: Information about young people's needs and aspirations will be recorded in a new secure online case management database and evaluated to assess the support received

Trust priority -- Employment, education opportunities and positive choices: Longer-term impact will be measured by a follow-up contact one year after the student has left the school

17. Beneficiaries

How many people will benefit from the grant per year? 280			
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) Brent 16%; Camden 3%; Croydon 3%; Ealing 9%; Enfield 6%; Hackney 7%; Hammersmith & Fulham 5%; Haringey 8%; Harrow 8%; Hillingdon 5%; Hounslow 9%; Kensington & Chelsea 4%; Lambeth 8%; Richmond 3%; Westminster 6%			
At what address will the activity be located? Ealing (face-to-face work); Islington (helpline)			
What age group will benefit? over 11 years			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	25	Black - Caribbean	4
White - Irish		Black - African	12
White - Other (please describe)		Black - Other (please describe)	
Any other white background	7	Other mixed	1
Asian - Indian	4	Black - British	
Asian - Pakistani	4	Chinese	
Asian - Bangladeshi	1		
Asian - Other (please describe)		Other (please describe)	
Any other Asian background	4	Choose not to say	38
			Open to everyone
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 £
Transitions Support Coordinator salary, NI and pension	32,574	33,452		66,026
Transitions Support Officer salary, NI and pension		24,070		24,070
Transitions Manager salary, NI, pension (17% of Managers' time to be spent on work in London)	9,077	9,167		18,244
Recruitment and training	1,750	1,250		3,000
Travel, Accommodation & Subsistence	2,800	2,800		5,600
Volunteer Expenses	2,000	6,000		8,000
New Online Case Management Database	8,000			8,000
Production of a transition resource	5,000			5,000
Mobile and dongle ipass	675	691		1,366
Postage, Printing and stationery	1,100	1,126		2,226
Equipment - Laptop and desktop computers for new workers; projector	2,100	1,800		3,900
Desk charges and support costs (IT, finance, HR)	4,725	12,384		17,109
TOTAL	69,801	92,740		162,541

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Major donors	19,801	15,199		35,000
Qualcomm		30,541		30,541
TOTAL	19,801	45,740		65,541

What other funders are currently considering the proposal?

Funder	£
TOTAL	

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 £
Transitions Support Coordinator salary, NI and pension	32,574	33,452		66,026
Recruitment and training	1,750	500		2,250
Travel, Accommodation & Subsistence	2,800	2,800		5,600
Volunteer Expenses	2,000	6,000		8,000
Desk charges and support costs (IT, finance, HR)	2,201	3,557		5,758
Mobile and dongle ipass	675	691		1,366
New Online Case Management Database	8,000			8,000
TOTAL	50,000	47,000		97,000

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">01/10/2012</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Funding from City Bridge would support the first 2 years of a 3-year plan to deliver Transitions, starting in London followed by a nation-wide roll-out. For the third year we are seeking funding from a major donor who has already committed £35k towards the work and from variety of corporate funders and trusts.
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>ALASTAIR GRAHAM</u> (your name)
am an authorised representative of <u>THE NATIONAL AUTISTIC SOCIETY</u> (your organisation)
within which I am <u>DIRECTOR OF FUNDRAISING + MARKETING</u> (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature <u></u> Date <u>14/06/2012</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
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- 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

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 £
Transitions Support Coordinator salary, NI and pension	32,574	33,452		66,026
Transitions Support Officer salary, NI and pension		24,070		24,070
Transitions Manager salary, NI, pension (17% of Managers' time to be spent on work in London)	9,077	9,167		18,244
Recruitment and training	1,750	1,250		3,000
Travel, Accommodation & Subsistence	2,800	2,800		5,600
Volunteer Expenses	2,000	6,000		8,000
New Online Case Management Database	8,000			8,000
Production of a transition resource	5,000			5,000
Mobile and dongle ipass	675	691		1,366
Postage, Printing and stationery	1,100	1,126		2,226
Equipment - Laptop and desktop computers for new workers; projector	2,100	1,800		3,900
Desk charges and support costs (IT, finance, HR)	4,725	12,384		17,109
TOTAL	69,801	92,740		162,541

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Major donors	19,801	15,199		35,000
Qualcomm		30,541		30,541
TOTAL	19,801	45,740		65,541

What other funders are currently considering the proposal?

Funder	£
Major donors	15,850
TOTAL	15,850

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 £
Transitions Support Coordinator salary, NI and pension	32,574	33,452		66,026
Desk charges and support costs (IT, finance, HR)	2,201	3,557		5,758
Mobile and dongle ipass	675	691		1,366
New Online Case Management Database	8,000			8,000
TOTAL	43,450	37,700		81,150

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

**Richmond Advice and Information on Disability (Richmond AID)
Amount requested: £71,880**

**Ref: 11345
Adv: Joan Millbank
Base: Richmond
Benefit: Richmond**

Purpose of grant request: To support young disabled people by developing a Travel Buddy Scheme so they can gain the skills and confidence to access activities and become more independent.

Background

Richmond AID (RAID) is a charity run by and for disabled people living in the borough of Richmond upon Thames. It works to them to have independent lives and to have the same opportunities as non-disabled people. RAID works with people of all ages and across a range of disabilities including physical and sensory, learning disabilities and mental ill health. Activities include: advice and fact-sheet information as well as website-based and specialist services for families of disabled children; benefit support service; an employment project working with disabled adults and employers to improve access to work placement, jobs, training and education; and a gardening service utilising volunteers.

RAID supports over 2,000 disabled people each year while its website attracted 20,492 visitors in 2011-12. Volunteers, including the trustees, provide over 6,500 hours of unpaid service per annum and make a significant contribution to RAID's capacity to reach its audience. Many volunteers are disabled and volunteering helps develop their employability and personal skills.

Funding History

In 2007 you awarded a grant of £60,000 over two years (£31,000; £29,000) towards the provision of an outreach service to benefit families with a disabled member. The grant has been satisfactorily monitored with the last return was assessed as 'good'.

Current Application

RAID is seeking a three year grant to meet the cost of employing a part-time project co-ordinator with on-costs to set up and run a travel buddy scheme. The scheme will assist young disabled people aged 14 to 25 years in transition to adulthood by supporting them to learn travel skills and gaining access to mainstream activities.

Need has been identified through direct consultation with young people, their parents and support agencies. Forty disabled young people/young adults will benefit directly from the initiative; the scheme will support their independence and choice, which will be monitored and measured. Work will also take place with parents to ensure that they feel comfortable and confident in letting their son or daughter use transport independently.

At least ten volunteer travel buddies will be recruited from RAID's existing volunteers and via specific recruitment within local communities, (special) schools, youth clubs and Volunteering Richmond; RAID also anticipate five peer travel buddies will be trained through the lifetime of the project i.e. young disabled people assisting other young disabled people.

Financial Observations

Audited accounts for the year ending 31st March 2012 show that the organisation ended the year with a surplus of £7,888 (2.6% of turnover). The reserves policy states that RAID aims to hold free reserves of between 4 - 6 months of salary costs, which is equivalent to £62,000 - £95,000. At 31st March 2012 unrestricted reserves stood at £83,106, which meets the policy target. At September 2012 the revised current year budget shows an income target of £310,279 of which £304,135 has been secured through grants; anticipated expenditure is £290,433 thus providing an expected end-of-year surplus of £13,365. The expected end-of-year outturn has been helped by LB Richmond, as the owners of the building, confirming that no rent will be charged in the year (£24,000 having been included in the original budget).

Officer's Appraisal

This is a carefully considered application from an organisation with a proven reputation in making a real difference to the lives of disabled people in Richmond. Adolescence is recognised as a difficult time for many teenagers but for young people with disabilities the problems are magnified. Being able to use public transport confidently is important for young disabled people to gain access to cultural, sport and general activities, to become more independent and is a critical stepping stone into further education, training and employment. The scheme will complement RAID's existing support to disabled young people and will be a new service in the borough. Targets are realistic and project costs are reasonable. RAID has a track record in engaging volunteers and volunteer time will contribute an estimated £68,100 of added-value to the project.

Recommendation

£71,880 over three years (£24,850; £23,380; £23,650) for the salary of a part-time (3 days per week) Travel Buddy Co-ordinator with project costs.



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)

11345

Date Received:

15/08/12

Programme
Area:

6

1. About your organisation

Name of organisation applying for grant: Richmond AID	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence Disability Action & Advice Centre, 4 Waldegrave Road, Teddington	
Postcode: TW11 8HT Is this your home address? No	
Contact person: Ms Lucy Byrne	Position: Chief Executive
Phone: 020 88316077	Fax:
E-mail: l.byrne@richmondaid.org.uk	
Website: www.richmondaid.org.uk	
Legal status of organisation: Charity	
If registered, please give charity number: 1074788	
Year and month organisation established: 3612476	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive transitions to independent living
Purpose for which funds are requested: (25 words maximum) To support young disabled people by developing a Travel Buddy so they can gain the skills and confidence to access activities and become more independent.
How much funding is requested? Year 1: £24,850 Year 2: £23,380 Year 3: £23,650 Total: £71,880

3. Aims of your organisation

Richmond AID is a charity run by and for disabled people in the London Borough of Richmond upon Thames. We support people with all kinds of disabilities, including physical and sensory impairments, mental health issues and learning difficulties. Our aim is to support disabled people to live independent lives and to have the same opportunities as non-disabled people. To achieve our vision of independence and choice we will:

- 1) Reduce poverty
- 2) Increase employment, education and leisure opportunities
- 3) Widen access to high quality information and advice
- 4) Improve access
- 5) Ensure disabled people have a strong voice locally
- 6) Understand, track and respond to changing needs
- 7) Raise awareness about disability among employers and service providers

4. Main activities of your organisation

Advice Support Service- 1300 enquiries per year, a website that receives 35,000 hits each year and produces a series of essential publications like fact-sheets and a local disability information handbook and a quarterly newsletter.

Benefits Support Service – free help face to face with our expert advisors or on the phone with form filling and advice on all aspects of benefit claims from Housing Benefit to Disability Living Allowance.

Children and Families Project - the 'access' project is a specialist advice service for families of children with disabilities to ensure families have information about services & activities.

SPADE Gardening Project - we provide an emergency garden service to disabled and elderly people in Richmond Borough. This project is staffed by a team of volunteers.

Employment Project- we have a range of toolkits and training for employers as well as supporting people back to work, training or education. Job Club – this year we piloted a very successful job club. Four disabled people were supported back into work and three into volunteering. Our model is one that allows disabled people to develop their skills and experience via a series of work placements.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
5	4	8	35

6. How do you support your volunteers?

We have an induction process for all staff and volunteers, we have created a Volunteer Handbook, we have a training programme, regular supervision, team meetings and a volunteer award ceremony at our AGM.

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	3 years

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	269,529
Activities for generating funds	
Investment income	661
Income from charitable activities	33174
Other sources	
Total Income	305,364

Expenditure:	£
Charitable activities	291,651
Governance costs	3,825
Cost of generating funds	
Other	
Total Expenditure	295,476
(Deficit)/surplus for the year:	7,888

Asset position at year end	£
Fixed assets	7,162
Investments	
Net current assets	83,106
Long-term liabilities	
*Total A	90,268

Reserves at year end	£
Endowment funds	
Restricted funds	0
Unrestricted funds	90,268
*Total B	90,268

* 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?
61

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 recruited 2 new trustees

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	/ 2008	Ref: 6756	Grant received: £60000	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) Richmond	93970	97430	132814
(iii)			
(iv)			
(v)			
(vi) Richmond Housing			200

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
Barnes Workhouse Foundation	4100	4300
Richmond Parish Land	9900	9900
Hampton Fuel Allotments	10000	10000
Lord Cockfield Memorial Trust	15000	10000
Trust for London	25000	18750
Lloyds TSB Foundation	10000	7500

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

We have appointed a Green Champion (our gardening co-ordinator) who is passionate about the environment and sends out green email tips and reminders re turning lights off, recycling etc

Printing - we encourage people to print less and all machines are set to double sided, office memos are emailed rather than printed

Recycling - we provide recycling bins and all documents that have been cross shredded to standard are added to the recycling

Transport - we encourage staff to cycle to work or meetings and there are places to lock your bike at the office, we encourage people to use public transport to go to meetings or see clients.

Kitchen - we have supplied real crockery and cutlery so that plastics are not used

Building - we have moved everyone to smaller desks and cleared out unnecessary paperwork so that we can maximise use of the building and therefore operate more environmentally.

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 project seeks to support young people and young adults (aged 14 to 25) with disabilities to gain independence and choice through accessing main stream activities in their community. We will work across all disabilities including learning disabilities, mental health and physical disabilities. The need has been established by talking to over 100 young disabled people about the barriers they experience in accessing activities as well as national reports and models of similar projects in other boroughs.

The 3 day per week Travel Buddy Co-ordinator will develop a 'travel buddy' scheme. The scheme will support young people and young adults attend an activity independently from their parents/guardians by helping them to access public transport to attend the activity. The activity can include arts and cultural activities, sports, volunteering opportunities, college, work, etc. The 'travel buddy' will support the disabled person to get to know the route, grow confident in their skills and experience and eventually feel confident enough to take the trip and attend the activity by themselves. We will also develop a group buddy service for those living in the same area and travelling to the same destination/club/activity.

We will work in partnership with local schools including special schools, youth clubs, Richmond Volunteering, local charities and the council to identify young disabled people for the scheme and to recruit volunteer travel buddies. Some of our volunteers will have learning disabilities or physical disabilities themselves and will provide peer to peer support. Young people and young disabled adults are referred on to the project through disability services, disabled people organisations, local schools, families and support workers.

We will employ a Travel Buddy Co-ordinator for 3 days per week to recruit, train and manage volunteers for the project, advertise the project, match the young disabled person with their travel buddy and support the young person by:

- Meeting with the individual to go through the options available to them
- Identifying a suitable club or opportunity they would like to attend
- Match them with a 'travel buddy' who will go to their house and support them to access public transport to and from the activity (for up to six sessions)
- Match them with a 'buddy' at the activity
- Taking on any phone calls necessary to organise for the individual to attend the club activity
- Providing inclusion training at activities

Aims

- To develop a Travel Buddy scheme to support young disabled adults to access mainstream activities
- To increase the confidence and skills of disabled young people in using public transport
- To provide volunteer opportunities for disabled people as Travel Buddies
- To enable disabled young people to achieve independence and choice

Objectives & outputs

- 40 young people per year have been supported by the Travel Buddy scheme and are more confident in using public transport
- 40 young people have said they feel that they have more positive choices in their lives and are more independent as a result of the Travel Buddy scheme
- 80% of parents feel more confident in letting a young person use transport independently
- 5 disabled young people have been trained as a Travel Buddy and have supported one or more disabled young people to access various activities

For more details see fuller proposal for more details and job description

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

Monitoring - We have a Client form that we fill in, monitoring information covers contact details age, ethnicity, disability, etc. Our client data is then recorded on our web-based database. We can easily report on numbers of clients, number of contacts, outcomes, etc.
We will check the information recorded on a monthly basis to ensure that we are getting enough referrals, that we are reaching a diverse group of young people, and that young people are being supported to independence.

Client Satisfaction - we ask each client to fill in a quick client satisfaction to see if people are happy with our service. We will track the progress of young people by entering each contact with then on our database with any progressions.

After young people have used the project we will continue to stay in contact with them on a six monthly basis so we can see what progress has been made including travelling by themselves, trying out new activities, feeling more confident and independent. We will also do an evaluation with parents to ask the impact of the project and if they feel more confident in letting their son/daughter use public transport.

As part of our monitoring process, we may require you to provide contact details of the grant's beneficiaries if appropriate.

17. Beneficiaries

How many people will benefit from the grant per year? 40			
In which local authority is your organisation based? Richmond			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Richmond			
At what address will the activity be located? Disabilty Action&Advice Centre, 4 Waldegrave Road, Teddington, TW118HT			
What age group will benefit? 14 to 25			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	70	Black - Caribbean	5
White - Irish	0	Black - African	5
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	5	Black - British	8
Asian - Pakistani	5	Chinese	2
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
Open to everyone			
What proportion of the beneficiaries will be disabled people? All the participants 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 £
Co-ordinator Salary inc NI and pension	14200	14480	14750	43,430
Co-ordinator Expenses (Phone, Transport)	500	500	500	1500
Volunteer Training	1000	1000	1000	3000
Volunteer Expenses	500	500	500	1500
Recruitment	500			500
IT Equipment	650			650
Office Costs (Phone, Copying, IT)	1500	1500	1500	4500
Building Costs (Rent, Utilities, Insure)	1500	1500	1500	4500
Travel Buddy Leaflet and Promotion	1000	400	400	1800
Management and Supervision	3500	3500	3500	10500
TOTAL	24850	23380	23650	71880

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
no other funding raised				
TOTAL				

What other funders are currently considering the proposal?

We will be applying to BBC children in need.

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 £
Co-ordinator Salary inc NI and pension	14200	14480	14750	43,430
Co-ordinator Expenses (Phone, Transport)	500	500	500	1500
Volunteer Training	1000	1000	1000	3000
Volunteer Expenses	500	500	500	1500
Recruitment	500			500
IT equipment	650			650
Office Costs (Phone, Copying, IT)	1500	1500	1500	4500
Building Costs (Rent, Utilities, Insure)	1500	1500	1500	4500
Travel Buddy Leaflet and Promotion	1000	400	400	2000
Management and Supervision	3500	3500	3500	10500
TOTAL	24,850	23,380	23,650	71,880

20. Funding requested from the Trust (continued)

When will the funding be required? The project will start January 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes the intention of the project is to continue. Over the three year period that the project is running and our record of successful outcomes and disseminate the successes to schools, clubs, etc. It is our intention to work in partnership with Volunteer Richmond to develop a project that works across a number of neighbouring boroughs including Kingston, Hounslow and Hammersmith.
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, Lucy Byrne (your name)	
am an authorised representative of	
Richmond AID (your organisation)	
within which I am Chief Executive (your position)	
To the best of my knowledge, all the information that I have provided in this application form is correct	
Signature	
Date	13/08/12

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 - Positive Transitions to Independent Living

Sense

Ref: 11393

Amount requested: £143,725

Adv: Jenny Field

Base: Islington

Benefit: London-wide

Purpose of grant request: Part fund employment of service delivery and campaign staff to develop and monitor transition services to deafblind young Londoners, special focus on Government pathfinder areas.

Background

Established in 1955, Sense is the national charity supporting deafblind people. Today, the Sense 'family' comprises a number of organisations:

- Sense, the trading name for Sense, The National Deafblind and Rubella Association, which works in England, Wales and Northern Ireland.
- Sense International, a separately registered company and charity, pressing for global change.
- Sense Scotland which is also a separately registered company and charity.
- Helping Sense Ltd, Sense's trading company which runs the Sense charity shops.
- The Royal School for Deaf Children (Birmingham), a separately registered charity.
- Coventry Society for the Blind, also a separately registered company and charity.

The Sense annual report and accounts are consolidated from all these organisations and it is this information that is provided in Question 8 of the application form.

Funding History

You have funded Sense on two previous occasions. In May 1999, you approved a grant of £142,000 over two years towards a specialist support service for deafblind people and in November 2005, you approved a grant of £105,000 over three years towards an advice and information service. This last grant came to an end in March 2009 and has been satisfactorily monitored.

Current Application

Sense is the only charity working with children and young people born deafblind or with multi-sensory impairments. You are asked to support a

project finding employment and training pathways for young deafblind Londoners in their transition to adulthood.

The context to this project is the Government's proposed reforms to special educational needs and disability. "Support and Aspiration: A new approach to Special Educational Needs and Disability" proposes a simplified system of support from the cradle to the age of 25 years which joins up education, health and social care. Under the reforms, parents would be entitled to receive direct payments to meet their child's special education needs. The reforms are currently being piloted in 20 Pathway local authorities, including Greenwich, Bexley and Lewisham in London.

Sense wishes to employ a Children and Family Support Worker to support deafblind children and young people through significant transitions in their lives. The needs of young deafblind people can be extremely complex, meaning that planning for their future needs to begin when they are barely out of childhood. An approach that joins up education, health and social care increases the likelihood of a successful transition into adulthood.

The Support Worker will help build parents' confidence in dealing with the various agencies and professionals that work with their child; support young people in managing their personal budgets; support children and young people in making their needs and preferences known to service providers; and raise awareness amongst service providers and professionals engaged with education, vocational and employment programmes about responding to the needs of young deafblind people.

The Support Worker will work closely with a part-time Campaigns Officer to inform and influence the range and delivery of health, social care and education services for deafblind children and young people within the Government's proposed reforms.

Financial Observations

The financial information provided in Question 8 of the application form is taken from Sense's annual accounts for the year ending March 2012. The surplus of £2.7m represents 3.5% of turnover. Sense's trustees review its reserves policy annually, with the target level of unrestricted funds being calculated by each member of the Sense 'family' according to their respective needs. The reserves target for the whole of Sense amounted to £21.9m as at 31st March 2012, which equates to 3.5 months' of total expenditure. At 31st March 2012, free reserves actually held stood at £18.5m which equates to 2.9 months' worth of total expenditure.

The forecast for the current year to 31st March 2013 shows an overall deficit of £36,000 (0.05% of turnover).

Officer's Appraisal

The proposal before you will support a group of highly vulnerable people through a period of significant transition and will help to raise their future aspirations. It is your policy in the case of large charities such as Sense, to fund up to 50% of the total project costs. This was explained during the assessment and the charity will seek to find the balance of funds from other sources. The recommended grant therefore reflects your policy.

Recommendation

£71,400 over three years (£23,200; £23,800; £24,400) towards a project supporting deafblind children and young Londoners make the transition into adulthood.



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)

11393

Date Received:

21/09/2012

Programme
Area:

06.

1. About your organisation

Name of organisation applying for grant: Sense	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: 101 Pentonville Road London	
Postcode: N1 9LG Is this your home address? No	
Contact person: Ms Dominique Muller	Position: Trusts Manager
Phone: 020 7014 9352	Fax: 0845 127 0061
E-mail: dominique.muller@sense.org.uk	
Website: http://www.sense.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 289868	
Date organisation established: 01/03/1955	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? 06. Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) Part fund employment of service delivery and campaign staff to develop and monitor transition services to deafblind young Londoners, special focus on Government pathfinder areas.
How much funding is requested? Year 1: £46,699 Year 2: £47,982 Year 3: £49,044 Total: £143,725

3. Aims of your organisation

To

- Provide a range of services for deafblind people of all ages that recognises the diversity of need of our individual service users;
- Provide appropriate information, advice and support to the families of deafblind people, and to the professionals who work with them;
- Conduct all activities in a way that will promote empowerment and participation;
- Develop new projects and services;
- Campaign for greater public, political and legal recognition of needs and actions to meet those needs;
- Continually seek to learn and improve our practice;
- Manage our operations to provide value for money without losing quality.

4. Main activities of your organisation

Sense provides services and support for deafblind people in England, Wales and Northern Ireland. We deliver a range of individually tailored support services based on an assessment of need and ability. These services can include professional consultancy to schools, care agencies and service providers, residential care and day services, domiciliary support and home-based support services, holiday and respite opportunities, and employment support.

The south locality of our national Children's Specialist Service (CSS) supports deafblind children and their families across 13 Counties and the 33 London Boroughs. Team members work from home and two offices, in Barnet and Epsom, and as at 31st March 2012 their caseload was 299 strong. The team delivers tailored packages of support that can include assessing the child's remaining sensory abilities, developing communications systems, supporting professionals in schools, providing families with ongoing emotional and practical support, weekly pre-school groups, Family Days, transition work and introductions to Sense-wide services [Information & Advice, Legal Support, Holiday programme].

In the south, we also run 13 residential services and a Day Centre (also located in our building in Barnet).

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
858	1,363	15	1,500

6. How do you support your volunteers?

Our Volunteer Policy includes training, health & safety, retention and recognition. It is linked to other general Sense policies such as Equal Opportunities, Safeguarding and Trustee recruitment. Sense value all volunteers and depends on them for its shops, holiday programme, family events and other services.

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	994 years

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	895,834
Activities for generating funds	21,931,171
Investment income	428,971
Income from charitable activities	54,777,282
Other sources	321,129
Total Income	78,354,387

Expenditure:	£
Charitable activities	60,962,555
Governance costs	66,204
Cost of generating funds	14,636,847
Other	
Total Expenditure	75,605,606
(Deficit)/surplus for the year:	2,748,781

Asset position at year end	£
Fixed assets	20,612,518
Investments	4,332,968
Net current assets	20,089,230
Long-term liabilities	(3,169,928)
*Total A	41,864,788

Reserves at year end	£
Endowment funds	447,393
Restricted funds	7,385,385
Unrestricted funds	34,032,010
*Total B	41,864,788

* 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?
69%

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:	08/05	Ref:	6797	Grant received:	£105,000	OR application rejected?	No
Month/Year:	08/99	Ref:	37	Grant received:	£142,000	OR application rejected?	No
Month/Year:		Ref:	0	Grant received:	£0	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:	Year:	Year:
(i)			
(ii)			
(iii)			
(iv)			
(v)	DoH, 6 grants overlapping over the years	161,652	177,517
	Northern Ireland DHSS, 2 grants	24,427	36,678
	Welsh National Assembly, core grant	97,000	92,000
	Other statutory grants from bodies		
(vi)	OUTSIDE LONDON (please note 1 in the accounts)	447,980	444,442
			102,525
			33,778
			94,000
			583,054

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
189 Trusts and Foundations		570,915
192 Trusts and Foundations	707,432	

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

We moved into the above office in 2007. When we refurbished the space, we installed:

- extremely efficient air conditioning and lighting systems, which are regularly maintained
- thermo-efficient window glazing
- low power (centralised) computer servers
- extensive recycling of paper, plastics and computer consumables etc.
- introduction of wood free paper (made from straw)
- a list of eco-friendly suppliers (e.g. our main stationery supplier uses only bio-diesel in its delivery fleet)

Staff are expected to use public transport wherever most practical and economical. We actively encourage conference calls and video meetings (through our national Lync IT system).

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.

c&yp=children and young people, 0-18

deafblind/MSI=deafblind/multi-sensory impaired

LA=Local Authority

There are an estimated 4,000 deafblind/MSI c&yp across the UK. Many have life-long, complex needs and face difficult transitions requiring highly specialised appropriate one-to-one, technical and communication support, delivered in a range of settings - home, school or the community.

Supported by health, social care, education or a combination, deafblind/MSI c&yp require specialist assessments and tailored support from qualified, experienced practitioners in order to learn, develop and achieve.

The project fits into "Positive Transitions to Independent Living", and will

- deliver specialist work to sustain deafblind/MSI c&yp Londoners "through some of the hardest transitions and challenges they face" and "support them in managing independent living and personal budgets".

- aim to minimise the risk that deafblindness is overlooked in the Special Educational Need and Disability reforms (involving education, health and social care providers), underpinned by political objectives that include deficit reduction; a low incidence disability is extremely vulnerable during such seismic shifts in policy and resources. Greater London offers an unparalleled opportunity to highlight issues arising across 33 boroughs, diverse communities and greater concentrations than elsewhere in the country. The project will connect with the three London reforms' pathfinders to inform legislation, "aiming to improve the range of services that get the least support from mainstream services."

Objectives: a dedicated Greater London Senior Children and Family Support Worker will

- Actively encourage LAs to identify deafblind/MSI c&yp resulting in increased numbers in annual schools' census and our LA survey. The 2012 Sense LA survey shows an average identification rate of 3 deafblind/MSI c&yp per 100,000, compared to the best official incidence estimate of 31/100,000.

- Support LAs to understand deafblind/MSI c&yp's unique needs.

- Provide support at transition points through our specialist packages of support, with a special focus on transition to adult services.

- Work with a Campaigns Involvement Officer (CIO) to highlight examples of good practice and engage with LAs to inform and influence improvements to the shape, co-ordination, range and delivery of health, social care and education services for deafblind/MSI c&yp.

- Support service users to engage with agencies that use direct payments and to offer feedback to LAs that develop their use in education/care services.

- Engage with the Greenwich, Lewisham and Bromley pathfinders to ensure that deafblind/MSI c&yp are identified in pilot programmes and, when identified, engage and discuss the c&yp's needs, and how they should fit into the new local processes.

Beneficiaries: Directly: Year1=15; 3 years=50. Indirectly and long-term: hundreds through positive impact on legislation and active engagement with relevant professionals and LAs' sensory teams.

Long-term aims: increased numbers of deafblind/MSI c&yp report greater choice and control in their lives, make positive choices about their lives, take up educational or employment opportunities and lead independent lives successfully.

Each staff will provide their Manager with quarterly quantitative and qualitative data against agreed workplans. The project as a whole will report to our practice-led policy development process, ensuring that practitioners, deafblind/MSI c&yp and their parents have a strong, authentic and consistent voice that provides genuine insights and accurate perspectives- a rarity in the sector.

Both Managers are specialists, experienced and well-regarded in their fields. They supervise tried-and-tested monitoring and evaluation processes and will ensure that project staff follow them throughout.

Only Sense can implement this project. We have over 55 years' experience of working with deafblind/MSI c&yp. Deafblind UK do not work with congenital deafblind people, nor with deafblind/MSI c&yp. RNIB and Action on Hearing Loss work do not reflect dual sensory impaired people's needs. The Sense Public Policy team has a track record of successful contacts in Government, Whitehall and both Houses of Parliament.

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

Quarterly returns for evaluation against expectations, covering

- caseload
- support packages provided
- parental/c&yp views of support provided
- contacts with LAs to increase understanding of deafblind/MSI c&yp's needs
- number of deafblind/MSI c&yp identified by LAs
- number of families/yp who offer effective feedback to LAs on using direct payments for education/care services
- deafblind/MSI c&yp included in pathfinders' programmes
- nature and frequency of engagement with/by pathfinders' programmes

Monitoring long-term aims (see summary)

- pathfinders' conclusions to ensure that deafblind/MSI c&yp's needs have been positively included in the new local processes.
- prepare c&yp for the transition to adult services from secondary school age by
- build parents' confidence and increasing their knowledge to explain their child's unique needs
- enable deafblind/MSI c&yp to express their needs/wants to providers
- support independent living and personal budgets management
- support service providers/professionals in employment/education/vocational to understand that deafblind/MSI c&yp can access their services with the right assistance.

17. Beneficiaries

How many people will benefit from the grant per year?
17

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?
Where we are needed: home, school, hospital, community facilities inc. other service providers...

What age group will benefit? **All children & young people**

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

	%		%
White - British	27	Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (we don't distinguish between black)	21
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (we don't distinguish between Asian origins)	48	Other (please describe)	
Open to everyone			Yes

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 £
A 2% inflation rate is applied year on year				0
Senior Children & Family Support Worker (SCFSW) - employment costs	29,354	30,186	30,816	90,356
Campaigns Involvement Officer (CIO) - employment costs	7,888	8,136	8,391	24,415
Transport costs - 1 year TfL Oyster Card 1-6 + TfL daily off-peak @ £8.50 x 2 days/week x 48 weeks/year	2,952	2,996	3,042	8,990
Communications	625	635	645	1,905
Office supplies & IT	391	397	403	1,191
Professional support, including registration and interpreters	500	510	520	1,530
Family activities (SCFSW only)	525	536	546	1,607
Management & supervision @ 10% of the total of all above lines	4,223	4,340	4,436	12,999
TOTAL	46,458	47,736	48,799	142,993

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
				0
				0
				0
				0
TOTAL	0	0	0	0

What other funders are currently considering the proposal?

Funder	£
TOTAL	0

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 £
Senior Children & Family Support Worker (SCFSW) - employment costs	29,354	30,186	30,816	90,356
Campaigns Involvement Officer (CIO) - employment costs	7,888	8,136	8,391	24,415
Transport costs - 1 year TfL Oyster Card 1-6 + TfL daily off-peak @ £8.50 x 2 days/week x 48 weeks/year	2,952	2,996	3,042	8,990
Communications	625	635	645	1,905
Office supplies & IT	391	397	403	1,191
Professional support, including registration and interpreters	500	510	520	1,530
Family activities (SCFSW only)	525	536	546	1,607
Management & supervision @ 10% of the total of all above lines	4,223	4,340	4,436	12,999
TOTAL	46,458	47,736	48,799	142,993

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">15/02/2013</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Both posts are intended to continue to deliver and help improve transition and other services to deafblind/MSI c&yp in London. Funding will be obtained through general and specific fundraising activities. Sense will also use some of its reserves if required.
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>Ms Dominique Pille</u> (your name)
am an authorised representative of <u>the Sense</u> (your organisation)
within which I am <u>The Trusts Manager</u> (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature <u></u> Date <u>26/9/12</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 - Positive Transitions to Independent Living**Charlie Chaplin Adventure Playground****Ref: 11296****Adv: Tim Wilson****Amount requested: £135,101****Base: Lambeth****Benefit: Lambeth and Southwark**

Purpose of grant request: Part-funding for the YES project for young disabled people, working to expand their horizons, increase their autonomy, develop skills and aspirations.

Background

Lambeth-based Charlie Chaplin Adventure Playground (CCAP) is approaching its 30th anniversary. Opened by Lady Chaplin and Lambeth Council as a playground for disabled children, CCAP now offers a wide range of services including after-school clubs for children with disabilities and statements of special need, term-time Saturday clubs and transition support for young adults. Given client need, CCAP's services are highly specialised. The charity draws on a large pool of sessional staff, with some activities requiring a significant proportion of young people in need of one to one support.

The majority of children attending CCAP come from low-income households, and all are referred by social services. Participation in CCAP activities not only offers young people social and physical benefits, but also provides important respite care for their care givers. The playground is based in a deprived ward just on the boundary between Lambeth and Southwark. As such the charity is supported by two local authorities and its services are in high demand.

Funding History

None.

Current Application

CCAP seeks funds towards its YES project. This is a service for young people aged 14 – 19, with City Bridge Trust support sought for work with those aged 16 and above.

YES is a relatively new service designed in response to parental concern that there was little provision for disabled young adults in the area, and that, whilst many CCAP clients had 'outgrown' the play facilities on offer, the charity could help prepare them to make the transition to a more independent adulthood.

CCAP piloted YES in 2010 with funding from Lambeth Council and has run the service since. 50 young people currently access the project. Work typically begins with a needs assessment, identifying each young person's level of autonomy and abilities. YES is a rolling project with young people participating for more or less time depending on need. The project covers money matters, practical literacy, sexual health, travel training, personal safety, excursions and an annual residential for team building activities. In addition to building participants' confidence, an important part of the YES project is to ensure care givers feel prepared to allow their young people make the transition to a more independent adulthood.

Financial Observations

Accounts for the year ended 31st March 2012 show a deficit of £3,936 (0.6% of turnover). This comprised a surplus on restricted funds of £45,295 and a deficit on unrestricted funds of £49,231 due to planned spending as the charity expanded its premises.

CCAP aims to hold unrestricted free reserves sufficient to cover key support staff and core costs for a minimum of three months. Based on expenditure for the current year 2012-13 this amounts to £65,750, which compares to an actual unrestricted free reserves holding as at 31st March 2012 of £115,267. Although this is above target, the charity plans to spend in the current year a further £36,913 on its premises and activities, and estimates that its free reserves holding will reduce to £78,354 by 31st March 2013. Whilst this remains above target, CCAP is likely to need the reserve buffer to help with possible cash-flow issues as Lambeth Council retender its youth services in 2013.

Officer's Appraisal

CCAP is a popular facility run by expert staff. It caters to children and young people who have complex needs, many of whom require one to one support. The YES project has been developed to help with the transition to adulthood, and has already been evaluated as a successful intervention.

Recommendation

£126,600 over three years (£34,400; £45,600; £46,600) towards staffing and on-costs for Charlie Chaplin Adventure Playground's YES project, on the condition that the full balance for years two and three is raised from other sources. Staffing costs to cover 1 day per week of the Project Coordinator, 2.5 days per week of the Senior Youth Worker and 1.5 day per week of the Finance Adviser.



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)

11296

Date Received:

12/07/2012

Programme
Area:

06

1. About your organisation

Name of organisation applying for grant: Charlie Chaplin Adventure Playground	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: Bolton Crescent Lambeth London	
Postcode: SE5 0SE Is this your home address? No	
Contact person: Ms Beverly Salmon	Position: Senior Playworker
Phone: 0207 735 1819	Fax:
E-mail: bev@charliechaplinadventureplayground.org	
Website: http://www.charliechaplinadventureplayground.org	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1126143	
Date organisation established: 01/01/1982	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive Transitions to Independent Living
Purpose for which funds are requested: (25 words maximum) Part-fund YES project for 90 disabled people (aged 14-19) over three years, expanding their horizons, increasing autonomy, knowing rights & responsibilities, developing skills and aspirations.
How much funding is requested? Year 1: £37,188 Year 2: £48,461 Year 3: £49,452 Total: £135,101

3. Aims of your organisation

Charlie Chaplin Adventure Playground is the only free, fully inclusive children's adventure playground in Lambeth and Southwark. We aim to: provide inclusive play opportunities for young people with disabilities and their siblings; improve, develop and extend the services we offer; share expertise and promote equal access to activities for children and people with disabilities. We enable users aged 5-19 with complex, high, care needs to play, socialise, have fun and enjoy the company of their peers and siblings in an equal environment. By employing highly qualified playworkers we provide child-lead adventurous activities indoors and out. Children are free to choose what they do, and we are lead by them in terms of the activities we provide. These include but are not limited to: cooking, sports, music, dance, drama, art, playing with the elements (fire, water, air, earth), building camps, using challenging play equipment, massage therapy, biking, go-karting and IT etc. Since 2008 we have been over-subscribed and have long waiting lists!

4. Main activities of your organisation

Charlie Chaplin offers a specialist, unique, inclusive play environment. We cater for children and young people aged 5-19 with disabilities or special needs and their siblings (231 registered users in 2011), plus non-disabled young people living locally (155 in 2011). We aim for children to become as autonomous as possible and promote equal opportunities. We provide the following services at the adventure playground site:
 Term-time: After school club for up to 25 registered users and 10 local users. Saturday club for 60 registered users and 25 local.
 Holiday playschemes: Mon-Fri for 90 registered users and 25 local. We also manage a holiday playscheme at the Michael Tippet School for children with special educational needs Mon-Fri for 65 users aged 11-19. We provide on-site activities to school groups, pupil referral units and adult services for up to 10 people a day on an ad-hoc basis during term time. We have recently secured funding for our Youth Empowerment Scheme which will run Mon to Fri and daytrips during holiday periods.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
2	122	5	5

6. How do you support your volunteers?

Our volunteers are a 'vital extension' to the service provision of the playground. We believe all volunteers have the potential of becoming paid staff and that they require as much support, training and supervision from line managers as paid playworkers.

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	8 years

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	6,531
Activities for generating funds	0
Investment income	71
Income from charitable activities	659,063
Other sources	0
Total Income	665,665

Expenditure:	£
Charitable activities	659,827
Governance costs	9,774
Cost of generating funds	0
Other	0
Total Expenditure	669,601
(Deficit)/surplus for the year:	(3,936)

Asset position at year end	£
Fixed assets	48,382
Investments	0
Net current assets	130,548
Long-term liabilities	0
*Total A	178,930

Reserves at year end	£
Endowment funds	0
Restricted funds	63,663
Unrestricted funds	115,267
*Total B	178,930

* 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?
95%

10. Material changes

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

As an inclusive service we are heavily relied upon by local authorities to provide high quality services for disabled people and their families. However we have been working since 2011 towards diversifying our grant income.

11. Previous applications to the Trust

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

Month/Year:	Ref:	Grant received:	OR application rejected?
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) Lambeth	320,766	344,391	585,512
(ii) Southwark	38,316	82,420	113,028
(ii) Hammersmith and Fulham		1,240	
(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
National Childrens Bureau	19,000	
Capital International	3,000	
Variety Club		12,000

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

Charlie Chaplin Adventure Playground (CCAP) brings greenery to the city through the transformation of land into a creative play and green space. We help children learn about nature and ecology in their urban surrounding. We aim to promote the understanding of the countryside and protect the existing plants and animals in the following ways: 1) Use non-polluting, renewable and recycled resources and materials and recycle waste material when possible. 2) Save energy, reduce pollution and unnecessary use of motor vehicles by encouraging sustainable transport, encouraging the safe use of bicycles and by walking. 3) Maintain a more healthy diet amongst users and provide for those who do not eat meat. 4) Encourage appreciation and understanding of how plants and animals are exploited and the ethical and environmental issues involved. Support reduced consumption of animals products, including animal testing, fur and leather. Smoking is not allowed anywhere on the CCAP site.

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: Society does not support teenagers with disabilities to become responsible, integrated, financially independent and active citizens. Their passage into adulthood is a painful one. Many young people living in Lambeth and Southwark face lonely futures bereft of education, employment and training. An array of child-hood services fade away and there is a distinct gap in adult services for them. We know young people who have become depressed, can regress, become victims or perpetrators of abuse at home, fall victim to gangs and have become suicidal. Some no longer remain at home and are moved to full-time care. One parent told us 'I feel anxiety, concern and disappointment about the lack of youth services and what the future will bring'.

The long-term effect of poor transition plans was evidenced in the government paper Every Disabled Child Matters and the Joseph Rowntree Foundation. They highlighted that targeted transition support that is regular, consistent and provides an array of opportunities for young is essential to avoid marginalisation.

In our successful 2010 pilot, one user said "for the first time in ages I have been listened to by adults who I like and who like me... I can't wait for more". We have several case studies evidencing the positive outcomes for users (maintaining education, gaining independence).

We consulted on the programme design with users, parents, carers, Lambeth Children with Disabilities Team and Lambeth Parents Advisory Team.

Delivery: The Youth Empowerment Scheme (YES) project will guide 90 disabled young people (aged 14-19), teaching them new skills whilst offering life-changing experiences helping them become more autonomous adults.

City Bridge funding over three years would support:

- 1) 1 day a week contribution to YES project co-ordinator post (extending to full time)
- 2) Yes Senior Youth Worker (3 days a week)
- 3) Finance Advisor / Manager (1.5 days a week)
- 4) 8 x Money Matters sessions per year
- 5) Residential for users in years 2 & 3
- 6) Contribution to Management costs @ 10%

The wider programme which has been part funded by Lambeth Council and Comic Relief includes: one-to-one mentoring, weekly Monday night youth sessions, Friday nights and Saturday day outings, annual camping holidays, community events and user led filming project (for evaluation purposes), provide AQA awards and accreditation.

The YES project is a youth-lead project, Objectives:

1. To support users to articulate themselves and influence others
2. To provide a range of opportunities where users gain skills and knowledge facilitating their transition to adulthood.
3. Enable users to make a positive contribution to their communities.
4. Improve the lives of users by helping them develop and realise aspirations.

Organisation: Charlie Chaplin Adventure Playground has 25 years' experience of disabled young people and families. As the only free, inclusive playground in Lambeth and Southwark, we have links in the voluntary sector, disabled people's sector, educational, youth and play sector.

Acknowledged as local experts in the field, Social workers, health practitioners, parents, London Play, Play England and play associations regularly turn to us for help.

Theme: The YES project will enable users to go on to live as independently as they can, contribute within their communities and give them aspirations for their futures.

Good Practice: We are committed to involving users a fully as possible and will give each user as much support as they need in order to make choices, lead and participate in activities.

Diversity: We recruit workers who share our principles of giving disadvantaged young people a voice. We recruit from communities that reflect our users, providing positive role models they can identify with.

Volunteers & Carbon Footprint: Please see answers on main form.

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

As an organisation we continuously monitor and evaluate ourselves through open communications with our managers, staff, users, volunteers, carers and service providers. We have rigorous monitoring methods which we will extend to the Youth Empowerment Scheme and in addition we will measure our outcomes through self-evaluation of users before and after participation in the programme, interviews and questionnaires with parents, carers and support workers, interviews with stakeholders and partners, staff feedback and observation, user progress reviews and the users own video diaries. We have also established a unit award scheme through the Assessment and Qualifications Alliance. The scheme records achievement providing interim accreditation of the work of young people. The schemes' flexibility and its facility to reward and celebrate success make it an ideal vehicle for developing user's self esteem and confidence.

17. Beneficiaries

How many people will benefit from the grant per year?			
30			
In which local authority is your organisation based?			
Lambeth			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each)			
Lambeth and Southwark			
At what address will the activity be located?			
Charlie Chaplin Adventure Playground, Bolton Crescent, Lambeth, London SE5 0SE			
What age group will benefit? Over 16 years			
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			100
What proportion of the beneficiaries will be disabled people?			
100%			

18. Funding required for the project

REVISED BUDGET ATTACHED AS APPENDIX A TW 14/11/12

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 £
YES Project Co-ordinator (full-time)	27,636	28,188	28,752	84,576
YES Senior Youth Worker (3 days p.w.)	14,890	15,187	15,491	45,568
Finance Advisor (1.5 days p.w.)	10,125	10,328	10,535	30,988
YES Camp x 3 days	11,819	12,055	12,296	36,170
YES Residential x 4 days	9,384	9,572	9,764	28,720
YES Out and About Sessions	7,451	7,600	7,752	22,803
YES Saturdays	6,261	6,386	6,514	19,161
YES Evenings	17,762	18,117	18,479	54,358
Training AQA	600	600	600	1,800
Monitoring and Evaluation	1,000	1,500	2,000	4,500
Promotion	500	500	500	1,500
Activities/Materials	2,900	2,900	2,900	8,700
Management Costs @ 10%	11,032	11,293	11,558	33,883
TOTAL	121,360	124,226	127,141	372,727

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
London Borough of Lambeth	56,291	11,808		68,099
Comic Relief	32,392	32,840	33,296	98,528
London Borough of Southwark	2,900	2,900	2,900	8,700
TOTAL	91,583	47,548	36,196	175,327

What other funders are currently considering the proposal?

Funder	£
BBC Children in Need	62,299
TOTAL	62,299

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 £
YES Project Co-ordinator x 1 day p.w.	6,085	6,207	6,331	18,623
YES Senior Youth Worker x 3 days p.w.	14,890	15,187	15,491	45,568
Finance Advisor x 1.5 days p.w.	10,125	10,328	10,535	30,988
YES Money Matters sessions x 8 per year	2,707	2,761	2,835	8,303
YES Residential x 4 days per year	3,381	4,406	4,496	12,283
Management Costs @ 10% Project Costs		9,572	9,764	19,336
TOTAL	37,188	48,461	49,452	135,101

20. Funding requested from the Trust (continued)

When will the funding be required?

01/11/2012

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

If so, how will it be resourced?

Our pilot demonstrates how popular the project is and we envisage excellent outcomes for users during the three years. Users, stakeholders, staff, volunteers and parents/carers will be involved in helping us evaluate the programme. An end of project report will be used to publicise our findings and help lever additional funding if successful and required.

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, Beverley Salmon (your name)

am an authorised representative of Charlie Chaplin Adventure Playground (your organisation)

within which I am Senior Playworker (manager) (your position)

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

Signature [Signature] Date 7/8/12

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

City Bridge Trust
Working with Londoners Grant Application - Supplementary Information
Page 3 of 3 - Funding Required

NB: Only yellow shaded areas can be edited. Areas in light blue will automatically total the relevant cells

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

List main expenditure headings and amounts. See note (m) on the Guidance Notes.

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
YES Project Co-ordinator (full-time)	27,636	28,188	28,752	84,576
YES Senior Youth Worker (3 days p.w.)	14,890	15,187	15,491	45,568
Finance Advisor (1.5 days p.w)	10,125	10,328	10,535	30,988
YES Camp x 3 days	11,819	12,055	12,296	36,170
YES Residential x 4 days	9,384	9,572	9,764	28,720
YES Out and About Sessions	7,451	7,600	7,752	22,803
YES Saturdays	6,261	6,386	6,514	19,161
YES Evenings	17,762	18,117	18,479	54,358
Training AQA	600	600	600	1,800
Monitoring and Evaluation	1,000	1,500	2,000	4,500
Promotion	500	500	500	1,500
Activities/Materials	2,900	2,900	2,900	8,700
Management Costs @ 10%	11,032	11,293	11,558	33,883
				0
TOTAL	121,360	124,226	127,141	372,727

What income has already been raised?

List main sources and amounts.

Source	Year 1 £	Year 2 £	Year 3 £	Total £
London Borough of Lambeth	48,880	19,219		68,099
Comic Relief	32,392	32,840	33,296	98,528
London Borough of Southwark	2,900	2,900	2,900	8,700
				0
TOTAL	84,172	54,959	36,196	175,327

What other funders are currently considering the proposal?

Funders	Amount Requested £
BBC Children in Need	62,299
Lambeth Endowed Charities	8,358
TOTAL	70,657

How much is requested from the Trust?

List main expenditure headings and amounts per year. See note (n) on the Guidance Notes.

Expenditure heading	£	£	£	£
YES Project Co-ordinator x 1 day p.w.	6,085	6,207	6,331	18,623
YES Senior Youth Worker x 2.5 days p.w.	12,408	12,655	12,909	37,972
Finance Advisor x 1.5 days p.w.	10,125	10,328	10,535	30,988
YES Money Matters sessions x 8 per year	2,707	2,761	2,835	8,303
YES Residential x 4 days per year		9,572	9,764	19,336
Management Costs @ 10% Project Costs	3,132	4,152	4,237	11,521
				0
				0
				0
				0
				0
TOTAL	34,457	45,675	46,611	126,743

Please ensure all three pages have been completed by clicking on the tabs below

ASSESSMENT CATEGORY - Positive Transitions to Independent Living**Khulisa****Ref: 11319****Amount requested: £90,000****Adv: J Grieve Combes****Base: Islington****Benefit: Islington**

Purpose of grant request: Silence the Violence Self-Referral Programme teaches individuals to manage aggression and emotions, offering opportunities to (re)build self-confidence, prevent violence and enhance social integration.

Background

Khulisa is the independent sister charity of Khulisa Social Solutions, one of the leading providers of diversion from crime, offender rehabilitation and restorative justice interventions in South Africa. Established in the UK in 2007, Khulisa (from the Zulu word meaning to nurture), aims to reduce UK offender and re-offending rates. The organisation delivers structured programmes which aim to give individuals the skills, understanding and resources they need to develop alternatives to violence, bridge divides and build stronger, safer communities. Programme content is derived from Khulisa's South African counterpart but carefully tailored to meet needs in the UK. To date Khulisa has delivered work in a range of settings including: Forest Bank and Parc prisons; Young Offender Institutions Feltham, Portland and Cookham Wood; schools and Pupil Referral Units in London and Sheffield; and community settings.

Funding History

None

Current Application

The application before you is for a new approach to Khulisa's successful 'Silence the Violence' programme. 'Silence the Violence' uses therapeutic methods in a small group setting of 10-15 to teach individuals how to manage their aggression and emotions. It is made up of 10 intensive modules run over a short space of time and includes group discussion, a focus on personal strengths, mask and hat making and 'wisdom circles'. In the weeks after the course there are follow-up group and on-to-one sessions. Participants can remain supported in the longer term through regular 'alumni' meetings. External evaluation of the programme has found improvement in participants' coping skills, empathy, personal distress, anger management and level of aggression, and in July 2012 it gained approval as an 'Effective Regime Intervention' from the Prison Service.

'Silence the Violence' was originally developed as an offender rehabilitation programme and primarily used in prisons. Khulisa has already developed 'Face It', a youth version of the programme delivered with schools and Youth Offending Teams. Khulisa now wants to expand into the community in Islington, Newham and Lambeth. Local consultation has shown need for this, as well as the flurry of inquiries received following a feature on its Evening Standard Dispossessed Fund grant.

Community programme sessions would be delivered at community settings and referrals would come not only from professionals such as probation officers and social services, but importantly from self-referrals. The open nature of the programme means that not all participants would be those leaving custody. However, it is anticipated that 70% of participants will be offenders/ex-offenders and the remainder will be people struggling with violence with varying degrees of contact with the criminal justice system.

Financial Observations

Khulisa's audited accounts to 31st March 2012 show a surplus of £139,431 representing 30% of turnover, including a £79,938 surplus on unrestricted funding which is partly made up of income generated through commissioned work with prisons and partly from unrestricted grant funding. The surplus has allowed Khulisa to build up its free unrestricted reserves which, as a relatively new charity, were previously very low. At 31st March 2012 reserves stood at £80,756, in excess of the reserve policy of £60,000. The excess is being used towards programme delivery. The 2012/13 budget currently shows a deficit of £89,827 on a turnover of £421,429. However, Khulisa is confident in securing a further £67,000 and can use reserves to cover any remaining costs.

Officer's Appraisal

The 'Silence the Violence' model already has a strong track record working in prisons and with young people. Your funding would enable Khulisa to develop and roll-out 'Silence the Violence' as a flagship community initiative delivering three programmes each year. The organisation hopes to attract further funding once the programme is up and running in order to expand to six programmes by year 3.

Recommendation

£90,000 over three years (3 x £30,000) for 25% of the salary of a full time Programme Manager, facilitators and on costs of delivering the Silence the Violence programme in three London Boroughs, conditional on the organisation revising its financial controls to require 2 signatories on all cheques and financial transactions.



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)

11319

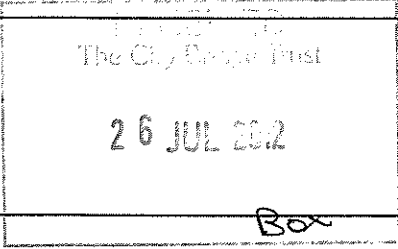
Date Received:

26/07/12

Programme
Area:

6

1. About your organisation

Name of organisation applying for grant: Khulisa	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence Unit 7 5-7 Wells Terrace Finsbury Park London	
Postcode: N4 3JU Is this your home address? No	
Contact person: Mr Simon Fulford	Position: Chief Executive
Phone: 02075013725	Fax:
E-mail: sfulford@khulisa.co.uk	
Website: khulisa.co.uk	
Legal status of organisation: Charity	
If registered, please give charity number: 1120562	
Year and month organisation established: 04/2007	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Positive transitions to independent living
Purpose for which funds are requested: (25 words maximum) Silence the Violence Self-Referral Programme teaches individuals to manage aggression and emotions, offering opportunities to (re)build self-confidence, prevent violence and enhance social integration
How much funding is requested? Year 1: £30,000 Year 2: £30,000 Year 3: £30,000 Total: £90,000

3. Aims of your organisation

Our Mission is to break the cycle of crime and violence by helping people to bring change to their lives.

Our Vision is that we all face as little crime and violence as those in our safest towns.

Our Values:

- Guide: by restoring empathy, self-belief and self-worth;
- Heal: individuals (perpetrators and victims) and communities;
- Nurture: by believing all people can grow

Our Single Objective is to cut crime.

4. Main activities of your organisation

Khulisa delivers unique, powerful behaviour-change programmes addressing violence and crime, fostering personal and community regeneration along with victim empathy. We start the process of rehabilitation through the use of therapeutic methods and creative participant-led techniques.

We work in prisons, schools and communities with offenders, ex-offenders, young people at-risk of exclusion and those experiencing high levels of crime and violence.

We offer intensive programmes along with mentoring and other long-term supports.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
6	2	5	40

6. How do you support your volunteers?

The support our volunteers depends on the role and task within the organisation but includes: formal job descriptions, induction and training, weekly personal contact and bi-monthly group meeting; ongoing training and expenses reimbursement.

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?
Liscense/rented	3 months rolling contract

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	411896
Activities for generating funds	
Investment income	57
Income from charitable activities	45385
Other sources	
Total Income	457338

Expenditure:	£
Charitable activities	315507
Governance costs	2400
Cost of generating funds	
Other	
Total Expenditure	317907
(Deficit)/surplus for the year:	139431

Asset position at year end	£
Fixed assets	952
Investments	
Net current assets	233356
Long-term liabilities	
*Total A	234308

Reserves at year end	£
Endowment funds	
Restricted funds	152600
Unrestricted funds	81708
*Total B	234308

* 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?

8%

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 now have 5 full-time and two part-time staff. One part-time staff member will be leaving in December 2012 due to the return of a part-time staff member from Maternity Leave. A new full time post is planned for February 2013. We now have approximately 50 volunteers.

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)	0	0	0
(ii) Haringey Youth Offending Servi	0	0	14,209
(iii)	0	0	0
(iv)	0	0	0
(v) Home Office	34,000	0	0
(vi) Met Police	0	1,673	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	Year: 2011
Monument Trust	100,000	155,000
Getty Trust	25,000	50,000
Esmee Fairbairn	30,000	30,000
Maria Marina Foundation	54,000	84,000
Dispossessed Fund		8,896

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

Khulisa allocates due attention to its carbon footprint. Taking into consideration the rising concerns about environmental problems, we encourage our staff and volunteers to support and get involved in environmentally friendly activities. We are committed to enhancing environmental sustainability in accordance with Environmental Legislation and Regulation. Our dedication is also demonstrated through our cautious approach to all products we buy, focusing on the purchase of recycled, fair-trade and ethically approved products when available, sensible use and conservation of water and the use of public transport wherever it is feasible. We are committed to reducing energy consumption and use energy efficient technologies as well as re-using or waste recycling when possible. Bearing in mind the impact which climate change has on our lives and collective future, we operate in an environmentally sensitive manner and support others to do the same.

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.

Our Self Referral project is a series open cohort community programmes for ex-offenders who experience difficulties in managing their violence and anger and are attempting to resettle after custody. The project will be open to referrals from statutory services (such as probations, Youth Offending Teams, Social Services) but primarily for self referrals by community members. By offering a Silence the Violence Self Referral service, Khulisa is also able to support and guide participants before, during and after the programme through our staff and volunteer base.

Silence the Violence is based on therapeutic methods leading to violence-reduction through motivational person-centred behaviour change. Initially an offender rehabilitation programme, it has been adapted for community members facing significant personal barriers and ex-offenders who are attempting to resettle and re-enter their communities. Often feeling un-heard by social services and/or un-supported by the probation, our programmes provide a resource these individuals can turn to free of charge. The programme fits well with the Positive Transitions to Independent Living theme of the Trust. Our initiative works as a clear signpost in the right direction for the least supported individuals facing difficult challenges.

The core of our programme consists of 10 modules of 2-3 hour facilitated sessions (usually run over the course of 5 consecutive days) using methodologies and approaches that include group and cognitive behavioural therapy, a developmental/strengths based approach and therapeutic methods including drama therapy, mask-making and mirror work. There are 10-15 direct participants per programme, whereas the number of implied beneficiaries is three times as high given the impact on family and/or community. The programme teaches individuals how to manage their aggression and emotions, offering them opportunities to (re)build self-confidence helping social integration and preventing violence and reoffending.

The course illustrates how violence (physical, emotional, and verbal) can become ingrained in cultures and belief systems and how it emerges in daily interactions. It particularly aims to identify the root of anger/violence in people's lives. Understanding causes allows an aggressive individual to come to terms with their actions, realise the impact of their acts both on themselves and others; change their attitudes and behaviour. In the short term, participants will be calmer, less violent and able to focus on their futures. In the long term, it means less offending and victimisation.

Ongoing support and engagement includes group and 1:1 sessions, referrals onto other training, employment and education opportunities as well as regular "alumni" meetings to reflect on progress and exchange experiences, tips and coping strategies.

External assessments of our model have revealed strengths of the program including (a) diversity of accommodated theories; (b) flow and sequence of sessions; (c) sharing of personal stories by facilitators, which is not a common practice in the UK. Participants have emphasized the "thought-provoking" effect of the course and that they felt "listened to" and "respected". In other words, their self-esteem and motivation have increased. Our work has produced tangible outcomes including reduced reoffending, better resettlement, and increased empathy towards victims among others. Additionally, Dr. Nicola Graham-Kevan, a forensic psychologist from University of Central Lancashire found significant statistical improvement in participants' coping skills & empathy, personal distress, anger management and levels of aggression.

"As someone that has completed over nineteen years in custody and has consequently completed numerous personal development courses I can honestly say that the course is the most beneficial and best delivered course that I have experienced" (Ex-offender, 2011).

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

Khulisa constantly monitors its programmes to ensure our participants get the best possible service and intended outcomes including:

- . Pre and post-assessment questionnaires to track behaviour change;
- . A facilitator's report which includes daily session logs and the monitoring of each participant;
- . Participant's written feedback for each day of the course and post-course;
- . Follow up with support groups to ascertain the maintenance of behaviour change;
- . 6 months to one year follow up to track longitudinal behaviour change and re-offending rates;
- . Community assessments tracked through local partners and forums

Khulisa contracts Dr. Nicola Graham-Kevan, a forensic psychologist from University of Central Lancashire, to analyse and interpret the pre and post-programme data on behaviour change along with longitudinal tracking. Khulisa has access to the Matrix Evidence, Ltd Economic Impact Assessment Tool which provides a cost-benefit analysis on (re)offending rates.

17. Beneficiaries

How many people will benefit from the grant per year? **Year 1: 30-45; year 2: 40 -60; year 3: 60-90. Indirect beneficiaries would be twice this.**

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)

Islington, Newham and Lambeth

At what address will the activity be located? **Various, depending on community need**

What age group will benefit? **18+**

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			100

What proportion of the beneficiaries will be disabled people?

While still unknown estimate is 20-30 % will have learning disabilities such as ADHD, dyspraxia and dyslexia.

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 £
Facilitator Fees	7,500	10,000	15,000	22,500
Programme Manager	7,840	10,453	15,680	33,973
Pre-Assessment & Support Group Session	7,875	10,500	15,750	34,125
Materials & Manuals	2,250	3,000	4,500	9,750
Food & Beverage	1,590	2,120	3,180	6,890
Transportation & Accomodation	4,035	5,380	8,070	17,485
Evaluation & Assessment	1,500	2,000	3,000	6,500
Admin & Overheads (office, phone, etc.)	4,889	6,518	9,777	21,184
TOTAL	37,479	49,971	74,957	162,407

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Monument Trust - core support	2,500			2,500
TOTAL				

What other funders are currently considering the proposal?

Allen Lane Foundation, the Worshipful Company of Weavers and others being identified such as Porticus Trust and Santander Foundation.

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 £
Facilitator Fees	7,000	7,000	7,000	21,000
Programme Manager	6,500	6,000	5,000	17,500
Pre-Assessment & Support Group Session	6,500	6,500	6,500	19,500
Materials & Manuals	1,500	1,000	1,000	3,500
Transportation & Accomodation	4,000	4,000	4,000	12,000
Evaluation & Assessment	500	1,000	1,000	2,500
Admin & Overheads (office, phone, etc.)	4,000	4,500	5,500	14,000
TOTAL	30,000	30,000	30,000	90,000

20. Funding requested from the Trust (continued)

When will the funding be required? **Ideally the project will start in November 2012**

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

If so, how will it be resourced? **We would like to continue the project beyond three years, but at this stage we are still in the process of developing our Community Self-Referral Programme. Consequently we do not have funding and partners in place to ensure its continuity. It is very much part of our strategy to plan for its long-term delivery and we will also be pursuing commissioning and local authority direct payments.**

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, **Simon Fulford** (your name)

am an authorised representative of

Khulisa (your organisation)

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

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

Signature



Date **24 July 2012**

Return the completed form to: The City Bridge Trust

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

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- **do send the information in the checklist** – if items are missing, your application will be returned to you
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- **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

Hammersmith & Fulham Volunteer Centre

Ref: 11337

Adv: Tim Wilson

Amount requested: £150,000

Base: Hammersmith & Fulham

Benefit: Hammersmith & Fulham, Brent

Purpose of grant request: Salary for a full time Connecting Communities Project Manager, training, volunteers expenses and some overheads.

Background

Hammersmith & Fulham Volunteer Centre (H&FVC) promotes and supports voluntary activity as a means to get people into employment, education or training. The organisation works in an area of London with relatively high levels of unemployment amongst young people and the over 50s, and has developed several partnership projects with local businesses, statutory agencies and other charities to help target-groups develop skills and gain work placement opportunities. The charity itself also offers a number of volunteer placements, supporting people to learn new skills and gain work experience.

Funding History

You awarded H&FVC £120,000 in 2007 to provide employment law advice in Hammersmith & Fulham and Brent. All monitoring reports were rated 'good' and the grant was made historic some time ago. A grant of £93,000 was awarded in November 2000 for three years' support of a Volunteer Manager post.

Current Application

H&FVC seeks funding towards its Connecting Communities project which will work with organisations across Hammersmith & Fulham and Brent, supporting them to host quality volunteer placements for disadvantaged individuals. The project will also help volunteers gain the skills and experience that will enable them enter education, employment or training once their placement has finished.

The charity will use its existing network to identify suitable host agencies, aiming towards 100 organisations each year with an even split between the two boroughs. The 110 individuals involved in the programme each year will be unemployed, unskilled, and with limited work experience. The charity will seek to engage a significant proportion of individuals who face

additional impediments to gaining work experience, such as caring responsibilities, a history of offending, mental health issues or disabilities.

To support the successful delivery of this project, H&FVC will train 50 people in Volunteer Management, and they will provide additional capacity to support placement hosts and volunteers. The Project Manager will provide oversight and structure the programme, and outputs are based on H&FVC's experience of delivering comparable projects in the recent past.

The charity has set targets for numbers of volunteers achieving vocational qualifications and progressing into employment over the life of the Connecting Communities project.

Financial Observations

Accounts for the year ended 31st March 2012 show a surplus of £504 (0.08% of turnover).

H&FVC holds unrestricted free reserves of £192,571 which is equivalent to 3.7 months of total expenditure. Whilst the charity's policy on reserves could be clearer, and your officer has discussed this with H&FVC, the reserve holding is comparable with other charities of similar size.

Based on secured income, the charity currently anticipates a deficit of £74,516 for the year ending 31st March 2013 as a result of reductions in local authority grant funding. Although it has a number of applications pending with other funders, the best case year-end would result in a £50,000 deficit. This can be met by reserves and the charity will scale down activity in 2013-14 to avoid another large deficit.

Officer's Appraisal

This proposal is both an ambitious and creative way of using H&FVC's extensive network to create high-quality placements that will enable people with limited experience and qualifications to get a foot on the ladder towards employment. The use of a network of volunteer managers allows the project to operate on a larger scale than would otherwise be possible if it relied on a single staff member. There are support costs built into the project budget to provide additional training and child care to those volunteers who might need extra support, and the charity is ambitious about extending this project to 'hard to engage' individuals who would otherwise face practical difficulties gaining work experience.

Recommendation

£150,000 over three years (3 x £50,000) for a full-time Connecting Communities Project Coordinator, on-costs and associated project support costs.



The City Bridge Trust

Charity Registration Number: 1035628

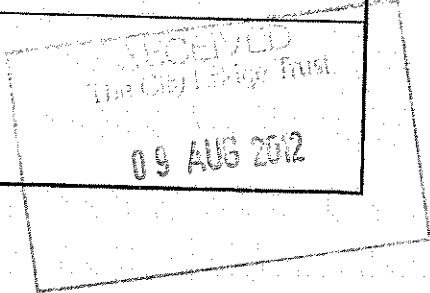
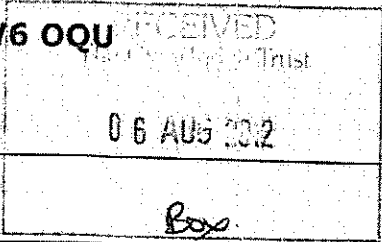
Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference: (office use only) 11337
Date Received: 6 Aug 2012
Programme Area: 7

1. About your organisation

Name of organisation applying for grant: Hammersmith & Fulham Volunteer Centre	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence 148 KING STREET, HAMMERSMITH, LONDON W6 0QU	
Postcode: OQU	
Is this your home address? No	
Contact person: Mr Ms Marion Schumann	Position: Director
Phone: 0208-741-9876	Fax: 0208-741-3344
E-mail: marion@hfvc.org.uk	
Website: www.hfvc.org.uk	
Legal status of organisation: CHARITY	
If registered, please give charity number: 1062032	
Year and month organisation established: 1996	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Strengthening the Third Sector
Purpose for which funds are requested: (25 words maximum) Salary for F/T Connecting Communities Project Manager, training, vols expenses and some overheads
How much funding is requested? Year 1: £50,000 Year 2: £50,000 Year 3: £50,000 Total: £150,000

3. Aims of your organisation

The overall aims of HFVC A) is to promote and develop volunteering opportunities B) to recruit, place and support volunteers and in particular people from BAME/R/WWC Communities so as to increase the involvement of these communities and to provide assistance through Information, Advice, Guidance (IAG) & training in order to get people into volunteering, work and/or education C) to develop good practice in the use of volunteers in Hammersmith & Fulham by providing information, training, support, advice to voluntary organisations in their use of volunteers D) to improve services for the community through the facilitation of volunteering opportunities E) to promote volunteering to the Voluntary, Statutory and Business Sectors to minimise social exclusion in the development of social and employment skills. F) to maintain the viability of HFVC through fundraising activities and the development of services G) to facilitate one off volunteering challenges for the business sector, to develop employee volunteering, & Skills Based Volunteering.

4. Main activities of your organisation

A) encourages volunteering in H&F and West London by disseminating information on local volunteering opportunities to prospective volunteers. B) recruits, supports and places volunteers with voluntary organisations, community groups and statutory service providers. C) provides support and training to the above groups and volunteers, and also BAME/R groups/ White Working Class (WWC) and Eastern Europeans. D) promotes good practice to VIOs, by organising and delivering training on a wide range of issues i.e. Volunteers & the Law; Volunteers with Extra Support Needs; Involving Young Volunteers, Good Practice and Volunteer Management. E) runs the Volunteer Organisers' Forum, disseminating IAG, and support to VIOs in H&F that use volunteers, and which enables user organisations to network and share skills and experiences. F) works with H&F Council on delivering the Transforming Local Infrastructure; works with the DWP/ JCP & West London Network to deliver the Volunteer Brokerage Scheme in H&F. H) runs Events 4 Youth, & AIM, 2 Big Lottery projects and Creative Minds, Comic Relief; I) runs Employee Volunteering, enabling local companies to contribute to the voluntary sector in terms of volunteering, secondment and donations of both cash and kind.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
9	4	10	15

6. How do you support your volunteers?

Through IAG, training, 1-1 supervision; monthly follow ups; providing quality volunteer placements, work experience placements, assistance into employment, education and training; volunteer expenses; limited childcare; reward & recognition, references

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	5yrs

8. Finance

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

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	50,000
Activities for generating funds	36,382
Investment income	157
Income from charitable activities	537,959
Other sources	
Total Income	624,498

Expenditure:	£
Charitable activities	606,452
Governance costs	13,358
Cost of generating funds	4,184
Other	
Total Expenditure	623,994
(Deficit)/surplus for the year:	504

Asset position at year end	£
Fixed assets	2,246
Investments	
Net current assets	203,394
Long-term liabilities	(4,310)
*Total A	201,330

Reserves at year end	£
Endowment funds	
Restricted funds	6,513
Unrestricted funds	194,817
*Total B	201,330

* 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?
49%

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: Apr	/	2007	Ref: 7592	Grant received: £120000	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) London boroughs	216531	204370	125945
(iii)			
(iv) Health authorities	0	44584	0
(v) Central gov't dep't	74513	375857	388347
(vi) Other statutory bodies	323392	242732	6000

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
Loyds TSB Foundation Trust		17500
Charities Aid Foundation	3000	0
John Lyons Trust	30000	0
Noble Execution Trust	0	15000
Comic Relief		13053

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

- All energy usage on HFVC premises or locations used by HFVC is controlled to ensure the lowest usage attainable within acceptable Health and Safety limitations.
- Use of water, fuels and other natural resources is controlled to minimise the usage and maximise the re usage of the resource. *Minimising the amount of waste for eventual disposal through a progressive approach: reducing the production of waste; * reusing materials where possible; * recycling everything possible ;recovering energy from the residue ;Solid and other wastes, particularly hazardous wastes are disposed of through appropriate public authority facilities and services;To reduce the environmental impact of the goods and services consumed by HFVC through a sensitive purchasing policy and the influencing of companies, bodies or groups with whom HFVC deals, by means of specifications or conditions, to adopt the same standards
- To reduce the environmental impact of traffic in London by maximising the business usage of public transport system, bicycle, walking or any other feasible alternative to the private car, and by other measures to reduce pollution and accidents.

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 grant will be used for the post of Connecting Communities Coordinator; some running costs; training and Volunteer expenses. Our project meets the CBT's criteria in many ways, and would enable HFVC to continue its work and benefit marginalised communities in H&F & Brent through: - Promoting and encouraging volunteering and community involvement throughout the 2 boroughs and particularly amongst socially excluded and disadvantaged groups. Through volunteering, members of the public are able to become involved in their community.

The Project will: - A. continue to promote volunteering throughout the 2 boroughs, prioritising the recruitment of under represented sections as stated above. B provide potentially 100+ voluntary organisations and community groups with appropriate volunteers, annually (50 each borough). C. use volunteering as part of capacity building linked to employment initiatives, and conduct weekly job search for unemployed clients wanting to work. D. facilitate and increase membership of the Volunteer Organisers' Forum (Disabilities), to share information, support, facilitate consultation and inter-agency networking. E. provide training for voluntary sector agencies on issues of policy and good practice in the use of volunteers and will run 4 training sessions per year (1 qtrly) F. improve the performance of organisations and the quality of service delivery by providing volunteers with ongoing support and training. G. ensure effective management of our volunteering services and continue this through monitoring and evaluation. H recruit, counsel, place and support over 110 volunteers, annually, in appropriate user agency placements/ events/, as well as provide training which will enhance their skills and employability. The partners for this Project will be CaVSA; CVS Brent; H&F Mind; Brent Mind; HAFAD; Refugee Forums; Chelsea, Fulham and QPR FCs.

Our Connecting Communities project will deliver the following outputs in H&F and Brent, annually; - Target & Recruit 110 Volunteers; work with 100 groups (50 in each borough)

110 Volunteers will be trained and placed, in Volunteer Placements and have the opportunity to be placed in a Business Placement, thereby assisting Businesses on Diversity issues/EOP access and help develop W4U's Skilled Based Volunteering Programme.

50 Volunteers & Groups will be trained in Volunteer Management, from this we will create 20 Volunteer Champions, to promote, publicise and sustain the CC Project

50 Volunteers will be trained in Fundraising for Community projects

50 Volunteers will be supported into career focused work placements.

12 Volunteers will achieve an IT certificate

12 Volunteers will achieve a Food & Hygiene certificate

12 Volunteers will achieve H&S training certificate

By providing organisations with volunteers, we will enable many organisations that entirely rely on volunteers to operate in and help build their local community. HFVC from experience increases the skills, confidence and capacity of both volunteers and voluntary organisations and community groups using volunteers. A benefiting factor for all potential volunteers from the Project is that they will be offered an interview and training in response to their needs. If they are interested in employment, they will be offered placements in a wide variety of organisations where they can receive on the job training and the opportunity to gain experience in a range of work areas. This enables these volunteers, many of whom are unemployed and socially excluded, to gain confidence, enhance skills, overcome depression and isolation and increase their employability. If they are interested in contributing meaningfully to their community they will be encouraged to participate in schemes, such as befriending; reading in schools to children; assisting with numeracy in schools; mentoring; joining a local decision making sub group; or getting involved in green issues such as removing graffiti or park clearances (these activities will be done in conjunction with local businesses as 'one-off challenges'). Our experience in running an Employee Supported Volunteering scheme has made our local businesses active in our community and in making a real difference by being involved in challenges, which benefit voluntary organisations and individuals who are the recipients. We have set up a Social Enterprise Works 4 U, working solely with businesses and the V&C sector to run challenges and develop a Skills Based Volunteering Programme in both boroughs, this will bring added value to this Project.

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

HFVC monitors progress using a range of mechanisms, such as outreach and consultation, responses to surveys/ questionnaires. All information is collated and fed back, via Coordinator to the Director and Trustees, who use it to review; monitor progress against budgets and plan future work as necessary. Anticipated project benefits are usually achieved. The Agency has in place a comprehensive monitoring and evaluation system. It keeps quantitative and qualitative records i.e. numbers of volunteers recruited and placed in organisations; feedback from volunteers placed; feedback from clients on work experience /placements; feedback from groups offered advice, feedback from participants on training courses through evaluation forms, regular reviews via surveys of participating groups and by selected user feedback systems. Progress measurement helps us to ensure that the Project is achieving our objectives for it, and, towards this end, intend to monitor both outputs and outcomes. We measure progress with each user & group

17. Beneficiaries

How many people will benefit from the grant per year? 110			
In which local authority is your organisation based? Hammersmith & Fulham			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Hammersmith & Fulham & LB Brent			
At what address will the activity be located? 148, King Street, London W6 OQU			
What age group will benefit? 18yrs-75yrs			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	30	Black - Caribbean	10
White - Irish	10	Black - African	15
White - Other (please describe) East Europeans	10	Black - Other (please describe)	
Asian - Indian	5	Black - British	
Asian - Pakistani	5	Chinese	5
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe) Disabled	10
Open to everyone			
What proportion of the beneficiaries will be disabled people? TEN percent			

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 cost	40096	40898	41716	122709
Training & child care cost	4580	4580	4580	13740
Office running cost	7911	7190	6812	21913
TOTAL	52587	52668	53108	158362

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
LBH&F	2587	2668	3108	8363
TOTAL	2587	2668	3108	8363

What other funders are currently considering the proposal?

None

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 cost	40096	40898	41716	122710
Training & child care cost	4580	4580	4580	13740
Office running cost	5324	4522	3704	13550
TOTAL	50000	50000	50000	150000

20. Funding requested from the Trust (continued)

When will the funding be required? Dec 2012/ Jan 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes, we will work with H&F & Brent Councils, local businesses and Registered Social Landlords, Trusts and Legacies for future funding, for part or totally.
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, Marion Schumann (your name) JENNY MELROSE am an authorised representative of HFVC (your organisation) within which I am Director/Company Secretary (your position) HR/DEPUTY DIRECTOR To the best of my knowledge, all the information that I have provided in this application form is correct Signature:  Date 30.07.12
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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

Committee:	Date:	Item No.
The City Bridge Trust	10 th January 2013	
Subject: Strategic Initiative: "The Giving Gain: Philanthropy, London and Success"	Public	
Report of: Chief Grants Officer	For Information	
<u>Summary</u>		
<p>This paper proposes commissioning the Charterhouse and the Museum of London to develop an exhibition on Philanthropy in London Past and Present.</p>		
Recommendation		
<p>That Charterhouse is commissioned to develop an exhibition in philanthropy, in collaboration with the Museum of London, at a cost not exceeding £152,000, to be charged against your budget for strategic initiatives 2012-2013.</p>		

Main Report

1.0 Purpose

- 1.1 At your meeting in September 2012, you received a paper setting out the City of London Corporation's Strategy on Philanthropy. This had been discussed at the Resource Allocation Sub-Committee Away Day on 6th July 2012. The Strategy comprises philanthropic activities which you have been funding for the last 18 months, and others in development. At your last meeting, these activities were brought together under the banner of "City Philanthropy – a Wealth of Opportunity".
- 1.2 The overarching aim of City Philanthropy – a Wealth of Opportunity is to embed a culture of philanthropy in the City and promote London as a global centre for philanthropy. An exhibition on philanthropy in London would help in part to achieve that aspiration and is one of the activities referred to in paragraph 1.1.
- 1.3 As part of the City of London Corporation's Strategy on Philanthropy, officers were asked to explore options on a philanthropy exhibition in collaboration with the Museum of London and the Charterhouse. This paper outlines the context of this exhibition, provisionally entitled "The Giving Gain: Philanthropy, London and Success". It seeks your approval to commission the Charterhouse in collaboration with the Museum of

London to develop the exhibition, at a cost not exceeding £152,000, to be charged against your budget for strategic initiatives 2012-2013.

2.0 The Concept

- 2.1 Whilst the City has a proud tradition of philanthropy dating back to the Middle Ages, it is one of London's 'hidden' stories. There could not be a more opportune time to shine a light on the charitable activities of the City, looking at the past and the present of philanthropy in the City.
- 2.2 The exhibition will show how the City has been built on generosity and a sense of social responsibility which accompanied wealth and religious values.

3.0 Background

- 3.1 Your officers have had several meetings with representatives from the Charterhouse and the Museum of London, to discuss the feasibility of the philanthropy exhibition. As Members will know, the Charterhouse is a historic complex of buildings in Smithfield, dating back to the 14th Century. Founded in 1371, it was originally a Carthusian priory, then following dissolution in 16th Century, it became a Tudor mansion, than an almshouse and school. It is a registered charity.
- 3.2 Nowadays it is home to 40 pensioners known as 'brothers' and whilst open for pre-booked tours, much more use of it could be made if it was accessible to the wider public. The Charterhouse is undertaking a major refurbishment and to this end you have provided them with an access audit. The intention is to put the philanthropy exhibition on permanent display in the refurbished Charterhouse complex and for it to be loaned to other City venues from time to time.

4.0 Proposed Structure of the Exhibition

Attractive, well-designed display stands and interactive exhibits will include:

Introduction

- What is philanthropy?
- Who can be a philanthropist?
(examples to include contemporary figures)

The medieval philanthropist

- Interpretation of the Norfolk Cloister
- The religious impulse: the importance of charity to all religions

Philanthropy in London

- Philanthropy is embedded in every part of London and yesterday's philanthropic activity has built infrastructure and institutions that endure today – here there would be a story focused on Bridge House Estates and City Bridge Trust.

Who, why and what?

- 10 case studies of philanthropy over the centuries, illustrating inspiring stories demonstrating the complexities of what and why people give.
- Philanthropists past will include Dick Whittington, Sir John Cass, Thomas Sutton and the Livery Companies.
- Philanthropists present might include Arpad Busson, John Studzinski and the Hamlyn family.

Philanthropy in London Today

- How does giving in London/UK compare with other places?
- How can philanthropy be encouraged?
- Is it about rebranding philanthropy and making it more competitive?

5.0 The Exhibition

- 5.1 The exhibition would comprise a series of well-designed display boards accompanied by relevant artefacts and audio-visual aids, for example, showing interviews with contemporary philanthropists or possibly the Lord Mayor.
- 5.2 The flexible nature of the exhibition will mean that the display boards can also be exhibited at the Museum of London, where it will be launched. This would alert the public to the full exhibition at the Charterhouse. The exhibition will be well marketed and it could feature in other spaces, for example in the foyer of philanthropically minded businesses, Mansion House and/or Guildhall. The exhibition will be further promoted through public events and lectures.
- 5.3 It is hoped that the exhibition would be completed and launched in September or October 2013, within the Mayoralty of Alderman Gifford, who has as one of his Mayoralty themes the promotion of London as a global centre for philanthropy.

6.0 Costings

- 6.1 A detailed budget is annexed at A, the total cost not to exceed £152,000. If you approved this initiative, the cost would be charged against your allocation of £1,347,500 for Strategic Initiatives 2012/13. To date you

have allocated £1,128,410, as set out in Table 1 below. If you approve the Strategic Initiative included in today's meeting, there will be a balance of £67,090 remaining for the year.

Table 1: Strategic initiatives 2012/13

Strategic Initiatives	Committee date	£
<i>Already agreed in advance for this financial year:</i>		
Quinquennial Review Horizon Scanning	16/02/2012	50,000
Social Investment Specialist Role	15/03/2012	50,000
<i>(The above were entered in the budget record in April 2012)</i>		
Learning & Sharing Strategy	26/04/2012	124,000
Reading Agency	26/04/2012	50,000
Beacon Award	26/04/2012	32,500
Greening Third Sector	26/04/2012	75,000
Lord Mayor's Show	31/05/2012	24,110
The Lord Mayor's Continuum (pending conditions)	18/07/2012	65,000
Literary initiative in Islington	27/09/2012	72,300
London Time Credits	31/10/2012	164,500
Ladder for London - Evening Standard campaign for more apprenticeships in London.	31/10/2012	140,000
City Philanthropy	29/11/2012	160,000
The Funding Network	29/11/2012	30,000
Young Philanthropy	29/11/2012	41,000
NCVO/VE Merger	29/11/2012	50,000
<i>For this meeting:</i>		
The Giving Gain	10/01/2013	152,000
	Total	1,280,410
	<i>Sum available</i>	<i>1,347,500</i>
	<i>Balance remaining</i>	<i>67,090</i>

7.0 Conclusion

- 7.1 Whilst there have been a few examples of exhibitions featuring aspects of the 'charitable City', notably the widely acclaimed Butcher, Baker, Candlestick Maker exhibition which was part of Celebrate the City; London lacks a permanent exhibition about the 'story' of philanthropy.
- 7.2 The exhibition will underline the importance of philanthropy now and in the future by demonstrating the impact that the generosity of individuals, businesses and charities has had on the creation and development of one of the world's greatest cities.
- 7.3 The exhibition will play a vital and sustainable role in promoting City Philanthropy – a Wealth of Opportunity; promoting the Mayoralty and the historic and dynamic role of Bridge House Estates, bringing due recognition to the role of the City of London Corporation as its trustee.

8.0 Recommendation

That Charterhouse is commissioned to develop an exhibition in philanthropy, in collaboration with the Museum of London, at a cost not exceeding £152,000, to be charged against your budget for strategic initiatives 2012-2013.

Clare Thomas, Chief Grants Officer
020 7332 3711
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Report written: 18th December 2012