

ASSESSMENT CATEGORY - Accessible London – arts & sports

Markfield Project

Ref: 11462

Amount requested: £166,910

Adv: Joan Millbank

Base: Haringey

Benefit: Haringey,

Islington and Hackney

Purpose of grant request: For staffing and associated costs of running weekly arts, social and sports sessions for adults with moderate learning disabilities and/or autism on a termly basis.

Background

Markfield promotes the dignity, choice, independence and inclusion of disabled people and their families. It has been providing services for people with learning disabilities (PwLDs) for over thirty years. Currently it provides a wide range of groups and clubs, information and advice sessions to address disabled people's needs through childhood, adolescence and into adulthood. It runs the Parent Partnership Service with funding from Haringey Council, which provides independent support to parents of children with Special Educational Needs (SEN).

Funding History

In 2007 you awarded a three year grant to employ a family worker. The grant was satisfactorily monitored.

Current Application

This application is seeking funding towards provision of accessible art, sports and leisure activities for adults with a moderate learning disability and/or autism aged 18 to 65 years. The work will build on the organisation's experience in providing such activities for adults with learning disabilities who qualify for statutory day care provision or personal budgets. However, your grant, if agreed, will target those who are ineligible for statutory support but who still have a need because of their disability and social isolation. Evidence of need has been gathered from PwLDs, their parents/carers, and from statutory authorities. National and local reports (The Learning Disability Coalition 2012) highlight increasing levels of unmet need as eligibility thresholds tighten due to public expenditure savings.

The project will deliver 8 additional places on a daytime arts group and/or an evening leisure group each week; and 12 places on a new evening arts, leisure and sports group. Each session will run for 2.5 hours, three x twelve weeks per year. Planning of activities will be managed through a users' committee, who will be trained and supported to carry out the role. Arts activities will include workshops with local artists, trips to art galleries and craft sessions. Sports and leisure activities will include dance,

swimming, music, yoga, Tai Chi and gym work. Tottenham Hotspur Football Club is offering football training. Activities will take place within the Markfield Centre or at local venues as appropriate. Travel training, volunteers and peer travel buddies will be provided to help participants attend sessions. Twenty people will directly benefit at any one time and forty people are expected to directly benefit over a three year period. Success will be measured through participation in activities, an increase in self-care, a decrease in challenging behaviour from participants and progression onto other activities.

Financial Observations

The audited accounts for the year ended 31st March 2012 show income of £565,708 and an end-of-year deficit of £77,893 (13.8 % of turnover), which was mainly on restricted funds (£62,331). The charity's reserve policy states that the organisation aims to hold free reserves equivalent to 4 to 6 months running costs, which equates to £194,874 to £292,311 based on budgeted current year expenditure. At 31st March 2012 free unrestricted reserves stood at £120,269, which equates to 2.5 months' worth of total expenditure.

The latest forecast for the year ending March 2013 shows income of £640,448, which the charity advises is all secured, and a projected surplus of £9,686. This comprises a surplus on unrestricted activity of £11,583, partially offset by a deficit on restricted funds of £1,897.

The 2013-14 budget show an overall deficit of £4,339, which relates entirely to restricted funds. Income is estimated to total £580,282 for the year and, to date, grant and contract income of £340,000 (59%) has been secured.

Officer's Appraisal

Markfield provides a range of valued services and support for people with learning disabilities and their parents/carers. Your funding would help Markfield provide accessible arts, leisure and sports activities to adults with moderate learning disabilities and those with autism who, despite their individual needs, do not qualify for statutory support. Since submitting the application the organisation has modified its bid and reduced its costs as reflected in Appendix A. Full project costs are sought including 360 hours (10 hours x 36 week) towards the project manager's salary (who will also act as session leader) and for sessional staff. Additional support will be provided by volunteers and members providing peer support, who will receive expenses where due.

Recommendation

A grant of £99,000 over three years (3 x £33,000) towards the staffing and running costs of providing adults with moderate learning disabilities and/or autism with opportunities to participate in accessible arts, leisure and sports activities.



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)

11462

Date Received:

01/11/2012

Programme
Area:

01

1. About your organisation

Name of organisation applying for grant: The Markfield Project	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: Markfield Road London	
Postcode: N15 4RB Is this your home address? No	
Contact person: Ms Sarah Miller	Position: Director
Phone: 020 8800 4134	Fax: 020 8800 1495
E-mail: smiller@markfield.org.uk	
Website: http://www.markfield.org.uk	
Legal status of organisation: Company Limited by Guarantee	
If registered, please give charity number: 289904	
Date organisation established: 24/01/1983	

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08 NOV 2012

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2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Accessible London - Accessible Arts & Sports
Purpose for which funds are requested: (25 words maximum) For staffing and associated costs of running a weekly arts session and a weekly social & sports session for adults with Learning Disabilities and/or Autism.
How much funding is requested? Year 1: £54,538 Year 2: £55,629 Year 3: £56,741 Total: £166,908 £56,743 £166,910 <i>JM</i>

3. Aims of your organisation

Markfield is a community centre in Haringey which promotes the dignity, choice, independence and community inclusion of Disabled people and their families. Our charity has a strong track record of providing high-quality services. Markfield uses the words 'Disabled people' to mean people who are isolated or excluded from full participation in society. We operate within the 'Social Model' of disability. This says it is society that 'disables' people. All the physical and economic barriers in the world, inflexibility in meeting needs and negative attitudes are what stops Disabled people leading full lives. Over the last 33 years Markfield has grown and developed beyond its original play-based services to provide a broad range of support services to Disabled children, adults and their families. An important part of our ethos is that we focus on the needs of the whole family. We particularly specialise in supporting people who have experienced difficulties accessing other provision or who have been labeled as 'challenging'.

4. Main activities of your organisation

Our current services include:

- Inclusive after school and holiday play services for 5-12 year olds which support Disabled and non-Disabled children to build positive relationships through play
- Innovative youth services where 11-19 year olds are supported to develop independence, self esteem, and citizenship skills
- Leisure services for adults with learning disabilities giving access to opportunities that are self-chosen and support active community participation
- Family support services including advice, advocacy and information, family training and befriending. Mutual support is encouraged through drop in groups such as our parent group, under 5s drop in, family club, and family activity days in our Adventure Playground
- Community initiatives which promote awareness of Disabled people's rights and needs, challenge discrimination and encourage inclusion. These include: training, volunteering opportunities, representation on policy forums and community use of Markfield's resources.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
7	21	9	12

6. How do you support your volunteers?

Our volunteers receive a structured training and induction programme delivered by our full-time Volunteer Co-ordinator. They are supported with regular supervision and they are offered on-going training that is relevant to their role.

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	renewal under negotiation

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	110,460
Activities for generating funds	7,464
Investment income	1,027
Income from charitable activities	446,211
Other sources	546
Total Income	565,708

Expenditure:	£
Charitable activities	620,654
Governance costs	15,975
Cost of generating funds	6,972
Other	0
Total Expenditure:	643,601
(Deficit)/surplus for the year:	(77,893)

Asset position at year end:	£
Fixed assets	55,502
Investments	0
Net current assets (liabilities)	153,483
Long-term liabilities	0
*Total A:	208,985

Reserves at year end:	£
Endowment funds	0
Restricted funds	59,945
Unrestricted funds	149,040
*Total B:	208,985

* 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?
80%

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 restructured the management and support team to reduce overhead costs. There is now one full-time Director (previously one full-time director and one part-time Fundraising Director).

11. Previous applications to the Trust

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

Month/Year:	12/06	Ref:	7821	Grant received:	£101,500	OR application rejected?	No
Month/Year:	09/01	Ref:	0	Grant received:	£60,000	OR application rejected?	No
Month/Year:	02/96	Ref:	0	Grant received:	£32,736	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)			
(ii) LB Haringey	375,175	439,969	408,952
(iii)			
(iv)			
(v) Dept for Education Dept of Health (Transition Fund)	10,000	10,000	10,000 61,871
(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
Leathersellers	10,000	10,000
Tottenham Grammar School Foundation	15,000	15,000
Henry Smith Charity	36,600	0
Lloyds TSB Foundation	19,900	0
BBC Children in Need	0	7,623
Help a London Child	0	4,375

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

Markfield has an Environmental Policy and Action Plan that is reviewed regularly. We recycle paper, printer cartridges and food packaging. We have measures in place to prevent waste water. Staff are encouraged to use public transport or bicycles, and there is a bicycle storage on site. We have a low emissions compliant minibus used for service user transport, and we also support service users with travel training on public transport, reducing the need to use taxis and private cars. We use recycled paper, and encourage staff to reduce unnecessary paper usage and use recycled materials on sessions. Our refreshments are locally sourced. We minimise our use of electricity, by ensuring appliances and lights are turned off when not in use. We completed an environmental audit by a specialist agency in 2010 which identified areas of improvement, strengths, weaknesses and potential actions to improve sustainability. This audit informed our action plan.

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.

Evidence of the need for the project:

There is a need locally for more arts, sports and leisure services for adults with Learning Disabilities (LD) and/or autism. This is evidenced by: consultation that we have carried out with local carers and our long waiting list for adults services. In our work with families over many years we find that high eligibility thresholds for statutory support mean that there are many adults with LD / autism, and those with no clear diagnosis, who do not receive services and are extremely isolated. This is also reflected in government reports stating that 'people with Learning Disabilities are often socially marginalised and isolated in their community' (Valuing People Now, DoH 2009).

How the project will be delivered:

This project is to deliver sessions for people with LD: a weekly daytime arts-based session for ~~12~~¹⁸ people and a weekly evening sports and social session for ~~16~~¹⁸ people, from the Markfield Community Centre (the building is leased by us from Haringey Council). SM

Activities will be based on service users' interests and skills and will include opportunities to work with local artists and exhibit work. The sessions will focus on participation within the community and use local facilities, such as parks and leisure centres.

Places will be targeted to those adults with LD who are just below the needs threshold to qualify for local authority-funded services, or whose needs are not being met through existing services.

Transport or travel training support will be provided for those who need it to access the sessions.

The funding would cover part of the costs of the existing part-time Adult Project Manager post and support workers.

Project aims: • Reduction in isolation and exclusion • Promotion of choice and self expression
• Improved mental and physical health • Promoting inclusion and contribution to the community.

Outputs will be measured through registers and service user plans. Outcomes will be measured through recording and evaluating the individual targets set in each service user's annual review.

Track record:

We have been providing high quality, innovative leisure services for people with LD for more than 30 years. We are well known and trusted within the community. Our fantastic building and location give huge scope to provide a range of activities in a safe environment. Our staff are highly trained, motivated and knowledgeable, with specialisms in sport, art and music.

How the project meets the Trust's 'accessible arts and sports' programme, and good practice principles: The project would increase confidence and self esteem of participants through physical exercise, improved local knowledge and use of community facilities as well as developing cognitive and creative skills through art.

Involving disabled people in planning and running the project: we have an established elected adult service user committee. This would be developed further for this project to involve service users in decision making over use of budgets and staff recruitment. Our forum of parent/carers of disabled adults also contributes to the planning of services.

Value diversity: Our centre is based in Tottenham, one of the most ethnically diverse communities in Europe. Our service users and staff reflect this diversity. This project will enable people to participate in art and sport activities together, which is a great way of exploring different cultural practices, enhancing shared understanding, and celebrating diversity.

Value and support volunteers: We have a well established Volunteer programme where volunteers are inducted offered supervision and training, and acknowledged with celebration events.

Steps to reduce carbon footprint: We work with our service users to increase awareness of environmental issues -- eg. by use of recycled materials and encouraging energy conservation.

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

Outputs will be measured through data gathered in service user plans and session registers: the numbers attending the sessions, their ages, ethnicity and postcode.
 Outcomes will be measured through progress towards targets set in individual annual reviews held with each service user. Examples of targets are: being able to independently access a local gym, contributing to arts fairs, taking up a new hobby, making new friends, improved communication skills, taking up a volunteer position, steps towards gaining paid employment. The reviews will use a range of accessible tools to gather service user views - such as symbol based communication systems, games and observation. Success would be measured by meeting these individual targets, as well as an overall decrease in challenging behaviour and improved self care and well-being. Evidence of this will be gathered both from service users, as well as feedback from other key people in their network, such as carers and support staff.
 Evaluation of the project will also be measured through the service user committee members' ability and enthusiasm to train for and carry out roles such as minute taker, chair and treasurer. Training and support will be provided, with the aim of reducing the level of support required over time.
 Service user involvement will be also evaluated through recording the origin of ideas for specific creative activities, and evidencing their progress towards realisation - for example through photographs.

17. Beneficiaries

How many people will benefit from the grant per year? **8 additional places on existing session, plus 12 places on a new session. Total 20 per yr.**

In which local authority is your organisation based?
Haringey

Which borough(s) of Greater London will benefit from this grant?
 (if more than one, please give % for each)
Haringey 85% Hackney 10% Islington 5%

At what address will the activity be located? **Markfield, Markfield Rd, London N15 4RB**

What age group will benefit? **18yrs -65yrs**

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 **X**

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 £
Project manager /session leader - salary and on-costs	17,498	17,848	18,205	53,551
Sessional support workers - salary and on costs	18,160	18,523	18,894	55,577
Staff training and travel	569	580	592	1,741
Volunteer expenses	161	164	168	493
Refreshments, session materials and trips	1,231	1,256	1,281	3,767
Transport: minibus and taxis	4,746	4,841	4,938	14,525
Building costs (utilities, maintenance, cleaning, security, reception)	4,450	4,539	4,630	13,619
Office and finance administration costs (telephone, postage, office equipment, photocopying, stationery, IT support, banking, audit, finance administration staff time)	1,535	1,566	1,597	4,698
Senior management, HR and governance costs	6,188	6,312	6,438	18,938
TOTAL	54,538	55,629	56,741	166,908

56,743 166,910

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

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

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 £
Project manager /session leader - salary and on-costs	17,498	17,848	18,205	53,551
Sessional support workers - salary and on costs	18,160	18,523	18,894	55,577
Staff training and travel	569	580	592	1,741
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Transport: minibus and taxis	4,746	4,841	4,938	14,525
Building costs (utilities, maintenance, cleaning, security, reception)	4,450	4,539	4,630	13,619
Office and finance administration costs (telephone, postage, office equipment, photocopying, stationery, IT support, banking, audit, finance administration staff time)	1,535	1,566	1,597	4,698
Senior management, HR and governance costs	6,188	6,312	6,438	18,938
TOTAL	54,538	55,629	56,741	166,908

56,743 166,910

20. Funding requested from the Trust (continued)

When will the funding be required?

01/04/2013

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

If so, how will it be resourced?

We are very experienced in managing projects that have time-limited funding. We would integrate this project within our overall fundraising strategy. Well before the ending of the funding period we will consult service users about whether they would like the project to continue, and if they do we will submit applications to alternative funders.

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

None required

Declaration on behalf of applicant organisation

I, SARAH MILLER (your name)


am an authorised representative of

THE MARKEFIELD PROJECT (your organisation)

within which I am DIRECTOR (your position)

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

Signature



Date

6/11/12

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

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 £
Project manager/session leader	7869	7493	7568	22930
Sessional staff	11429	11543	11659	34631
Staff training & travel	547	552	558	1657
Volunteer Costs	161	163	164	488
Refreshments, session materials, trips	1,411	1,425	1439	4275
Transport: minibus and taxis	4,791	4,839	4887	14517
Building Costs	1707	1724	1741	5172
Office, admin and finance costs	918	927	936	2781
Organisational management and governance	4197	4239	4281	12717
TOTAL	33030	32906	33235	99171

What income has already been raised?

(List amounts and main sources)

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

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 £
Project manager /session lead	7869	7493	7568	22930
Sessional staff	11429	11543	11659	34631
Staff training & travel	547	552	558	1657
Volunteer Costs	161	163	164	488
Refreshments, session materials, trips	1411	1425	1439	4275
Transport: minibus and taxis	4791	4839	4887	14517
Building Costs	1707	1724	1741	5172
Office, admin and finance costs	918	927	936	2782
Organisational management and governance	4197	4239	4281	12717
TOTAL	33030	32906	33235	99171

ASSESSMENT CATEGORY - Accessible London - Arts & Sports

Misgav

Ref: 11473

Amount requested: £56,499

Adv: Joan Millbank

Base: Hackney

**Benefit: Hackney,
Haringey & Barnet**

Purpose of grant request: Salaries for an Activity Coordinator and Finance Officer, enabling Misgav to develop its capacity in delivering a range of arts and sports activities to learning disabled women.

Background

Misgav was set up in 2006 to improve the lives of young women from the Charedi (Orthodox Jewish) community in Hackney and Haringey with a range of disabilities. Population profiles show that there are 20,000 Orthodox Jews living in Hackney and Haringey; an estimated 320 are adults with a learning disability. It is well known that people with learning disabilities (PwLDs) are often excluded from mainstream sports and leisure activities; young Jewish women experience further exclusion because of cultural and religious requirements. Also PwLDs tend to have a sedentary lifestyle. Lack of exercise and the effects of medication put their health and wellbeing further at risk. Misgav works to fill the gap by providing a range of accessible arts and sports activities in a women-only setting. Sports activities include wheelchair netball, partnered cycling, swimming and gym work, while arts activities include crafts, film making, music making. Activity day trips are provided within and outside London. An annual residential provides an adventure holiday for the young disabled women and a respite break for their parent/carers.

Funding History

None

Current Application

The applicant is seeking support to meet the cost of the Activity Coordinator (20 hours per week) and the Finance Officer (15 hours per week). A grant will secure these posts for three years and by doing so enhance the capacity of Misgav to expand its 'offer' while building its longer term sustainability as a specialist disabled women's sports and arts organisation.

At least 14 hours of sports and arts activities will be provided each week, on Monday, Tuesday and Wednesday evenings, and on Sundays. Activities will be sports and arts based, delivered through small groups and on a one-to-one basis to meet the particular needs and interest of each young

woman. Each year, a minimum of 16 young women with mild, moderate and severe learning disabilities will benefit; most also have physical disabilities and experience social isolation.

A small part-time staff team will organise and run the activities alongside specialist trainers as required. A pool of 80 trained volunteers will help reduce participation costs by providing one-to-one support and other support services e.g. drivers. In 2012 volunteers donated approx. 4713 hours of support. Premises costs may seem high but these include the hire of gyms, swimming pools and cycle tracks to provide women-only sessions.

Financial Observations

The audited accounts for the year ending 31st March 2012 show income of £96,002 and an end-of-year surplus of £8,571 (8.9% turnover). The reserves policy states that the organisation aims to hold free unrestricted reserves of between six to twelve months' worth of running costs, which equates to £44,000 to £88,000 in the year. At 31st March 2012 free unrestricted reserves stood at £46,534, which is on target.

The revised budget for 2012-13 shows £85,498 secured income, and a projected end-of-year surplus of £818. The 2013-14 budget shows projected expenditure of £105,847 against projected income of £106,868, of which £80,870 has been secured to date.

Officer's Appraisal

Misgav is a charitable trust. Users' views inform wider organisation planning and activities are designed and delivered with full regard to each user's interests and ability. The organisation is linked into local disability networks, takes referrals from Step by Step, the Jewish children's charity and receives organisation development support from Interlink, the Jewish infrastructure organisation. Volunteer involvement is impressive.

This proposal offers you an opportunity to assist disabled young Jewish women to undertake sports and arts activity. Most users will not be eligible for personal budgets despite their disabilities and social need. By offering a specific service Misgav is opening up opportunities and removing barriers to participation, while addressing specific cultural parameters for a particular marginalised group of Londoners. This application fits your grant criteria.

Recommendation

£56,500 over three years (£18,200; £18,900; £19,400) towards the salary of a part-time Activity Coordinator and part-time Finance Officer for a dedicated sports and arts disability project and on the condition that the Trust is not the largest revenue funder in years 2 and 3.



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)

11473

Date Received:

09/11/12

Programme
Area:

1

1. About your organisation

Name of organisation applying for grant: Misgav	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence London	
Postcode: N16	
Is this your home address? Yes	
Contact person: Mrs Sarah Schmerler	Position: Director of Services
Phone: 020 7998	Fax:
E-mail: sschmerler@misgav.org.uk	
Website:	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1125362	
Year and month organisation established: February 2006	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Accessible arts and sports
Purpose for which funds are requested: (25 words maximum) Salaries for a Activity Coordinator and Finance Officer, enabling Misgav to develop its capacity in delivering a range of arts and sports activities to learning disabled adults
How much funding is requested? Year 1: £18,172 Year 2: £18923 Year 3: £19404
Total: £56499

3. Aims of your organisation

The aims of Misgav are to improve the quality of life of women (aged 13-40) with physical, emotional or learning disabilities (incl Down Syndrome, Autism, Cerebral Palsy and a range of mild-severe learning difficulties), by providing educational and sports activities. The aim of these activities is to enhance their lives by improving their health, learning new skills and improving access to sports and arts programmes they would otherwise lack because of their exclusion from mainstream programmes. Most of our users are from the local Orthodox Jewish (OJ) community although we welcome any disabled women who wishes to join. Our users face exclusions as a result of their disabilities as well as their cultural needs of separate gender and culturally appropriate activities. We aim to give the disabled participants life and other skills so that they can reach their personal potential, and be integrated into mainstream society. We also aim to support their parents/carers in their caring role by giving them opportunities for respite so that they can recharge their batteries

4. Main activities of your organisation

The main activities of Misgav consist of an extensive programme of out of hours activities for women with physical and learning disabilities. We organise activities on five days for a total of fourteen hours each week. The women have the decisive say in what they do, and the activities they have chosen consist of: 1) aerobics, swimming and music for 6 hours on Sundays 2) A daily, 2-hour evening program of netball (certainly the most popular activity of the week!) gardening, food and nutrition (which includes cooking a weekly dinner), and model making. This totals an eight hour program running on Mondays, Tuesdays, Wednesdays and Saturdays.

We also run a week-long annual winter residential for our users where we provide a range of sports, arts and social activities, and visits to local places of interest.

All these activities are run by a combination of paid and volunteer workers, with co-ordination and administration being done by paid workers, supplemented by volunteers.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	14	3	80

6. How do you support your volunteers?

By providing them with induction and regular training as well as supervision every 3 months at which any issues that they might have can be raised. We also hold annual appraisals and regular staff meetings, and a celebratory bi-annual event.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	1 year & option to extend

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	40,046
Activities for generating funds	0
Investment income	0
Income from charitable activities	49,103
Other sources	6,853
Total Income	96,002

Expenditure:	£
Charitable activities	86,321
Governance costs	400
Cost of generating funds	710
Other	0
Total Expenditure	87,431
(Deficit)/surplus for the year:	8,571

Asset position at year end	£
Fixed assets	3,268
Investments	0
Net current assets	46,534
Long-term liabilities	0
*Total A	49,802

Reserves at year end	£
Endowment funds	0
Restricted funds	0
Unrestricted funds	49,802
*Total B	49,802

* 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?
7.14%

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:					<input checked="" type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/ -	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

12. Previous funding received

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

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii) Youth Opportunity Fund		5084	
(iii) Hackney & Haringey	2500	23699	35800
(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
Awards For All		10000
British Heart Foundation		2000
BT Community Connections		170
Capital Growth		1000
East London Business Alliance		1682
ELCF Grassroots	2750	2250

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

Misgav is very aware of the importance of conserving the planet and reducing its carbon footprint. To this end, we reduce the use of paper as much as is feasible and communicate by email wherever possible. We also use natural light and ventilation as much as we can, and keep the temperature of our offices as low as is still comfortable in the colder seasons. We make sure that all equipment is turned off out of hours, when it is safe to do so, including lighting and heating, and we use low energy light bulbs. Our staff walk to work, and our users walk to activities wherever possible. We educate them in the importance of reducing our carbon footprint, and do not use disposables either in the office or in our activities where feasible and practical. We recycle paper, our ink cartridges, and any other possible materials.

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: Hackney and Haringey have a OJ population of 18-20,000 (Mayhew, Estimating and Profiling the Population of Hackney), 8% of the total population growing at a rate of 5-6% each year. There are an estimated 4000 adults with learning disabilities in Hackney (Hackney Joint Strategic Needs Assessment) which extrapolates into 320 adult OJ with learning disabilities. These statistics and our own research confirm that there is a great need for an out of hours programme for women with learning disabilities enabling them to access sporting and arts activities. The women we target live at home; some attend a day centre learning life skills/independence, with a few hours a week work experience. Some of our users are at home all day with little to occupy them; several attend mainstream schools. The common denominators are a lack of general out of hours activities as well as a particular lack of access to arts and sporting activities. This is a result of a number of factors. Firstly, being women with disabilities excludes them from mainstream activities as they need high levels of supervision and activities appropriate to their abilities. Secondly, they belong to an ethnic minority with its own very specific cultural and religious requirements including separate gender and culturally sensitive activities which make many mainstream activities inappropriate for them. And thirdly, they are on low income with little resources to be able to finance their own leisure time activities. These findings were revealed by running a focus group, by distributing questionnaires to potential and current users and their families, and through our work with women with disabilities over the last 6 years. There are no groups locally apart from ours, providing out of hours activities to this client group, or any significant sports and arts activities to them, even during day hours.

The Project: We are planning an out of hours programme of sporting and art activities on Sundays, and weekday evenings totalling 14 hours weekly for 14-16 young women with learning disabilities. The sport programme will consist of netball, aerobics and swimming, and the arts activities will be model making and music, possibly finetuned as a result of input from our users. We are asking The City Bridge Trust to finance the salaries of a Project Manager and a Finance Officer so that Misgav can increase its capacity and develop its programmes further to fill the ever increasing need as the population grows. Activities will be run by trainers assisted by volunteer youth workers.

Outcomes: The outcomes we are planning to achieve are:

1. 14-16 young women with learning disabilities will have access to new opportunities in the arts and in sports.
2. 14-16 young women with learning disabilities will report improved physical and mental wellbeing.
3. 14-16 young women with learning disabilities will develop improved skills and enjoyment in sports and in practical arts activities.

The Right Organisation: Misgav, a grassroots organisation that has been the sole provider in the community for out of hours activities for young women with disabilities since 2006, has developed the skills, the knowledge, the reputation and the networks to make it the ideal organisation to deliver the work we have described.

Meeting the Trust's Theme: This project meets the Trust's theme of enabling disabled people to lead lives that are more independent and fulfilling, by improving access to arts and sporting opportunities. This planned project will help our disabled users to participate more fully in society as they will acquire new skills and interests that can be developed further. The activities will also give them new friends, very often a particular problem for disabled people, they are often very lonely. It will also give them a range of interesting and enjoyable arts and sporting activities to fill their leisure hours, which would otherwise be arid and boring. The project will give them access to a world of interest, of opportunity and of fun, in the company of their contemporaries.

Good practice: Our users are involved in every aspect of the planning of the project, including recruitment and activities, as well as organising programmes and activities. They will also decide on which activities should take place and when. We and they value diversity, and will welcome people of all backgrounds, countries of origin and ability or disability, so long as this is an appropriate project for them. We have a large group of volunteer support workers for this project, and we support them in the ways we described in Q6. We, our staff and volunteers and our users are reducing our carbon footprint as we described in Q14.

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

We will keep a register of all attendees at each activity. We will issue questionnaires to each user at the end of each term which our volunteers will help them complete if they are unable to complete them independently themselves. The questionnaires will have before and after questions relating to our outcomes and to the outcomes of the programme. Target sheets will be completed for each participant at the start of each term where the previous terms' progress will be carefully monitored and future targets set. Each trainer will need to complete an assessment on each user every half year in which she will be asked to record how far she feels the user has advanced to the planned outcomes, both ours and those of the programme. The results of these reports will be evaluated, results recorded and progress reports compiled. These results will show clearly how far the project has gone towards achieving its planned outcomes and the project will be finetuned according to evaluations of the progress reports.

17. Beneficiaries

How many people will benefit from the grant per year? **16 young and older adults with disabilities + their family members/carers**

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

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Hackney 85% , Haringey 10%, Barnet 5%

At what address will the activity be located? **85b Lordship Rd N16, Gladesmore Leisure centre, East-London Reservoir**

What age group will benefit? **15-40**

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

	%		%
White - British	10	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) OJ	90
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 £
Activity Coordinator salary	12480	12854	13240	38574
Employers NI	689	741	794	2224
Finance Officer salary	7800	8034	8275	24109
Employers NI	43	44	45	132
TOTAL	21012	21673	22354	65039

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Awards For All (Activity Coordinator)	1640			
TOTAL				

What other funders are currently considering the proposal?

We have submitted an application to the Hackney council Grants program for £1200 for Activity Coordinator, part of £25000 (Year 1). We will apply again for Year 2 and Year 3 Activity Coordinator; £2750 in Year 2 and £2950 in Year 3.

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 £
Activity Coordinator salary	9640	10104	10290	30034
Employers NI	689	741	794	2224
Finance Officer salary	7800	8034	8275	24109
Employers NI	43	44	45	132
TOTAL	18172	18923	19404	56499

20. Funding requested from the Trust (continued)

When will the funding be required? March 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Three year funding for an Activity Coordinator and a Finance Officer will give Misgav a window of opportunity to develop a fundraising programme. Volunteer time which has till now been spent on running the organisation will be freed up to develop a data base of loyal funders which will set the organisation on the road to long term sustainability.
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, Sarah Schmerler (your name) am an authorised representative of Misgav (your organisation) within which I am Director of Services (your position) To the best of my knowledge, all the information that I have provided in this application form is correct Signature <i>S. Schmerler</i> Date <i>07/11/12</i>

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

Please <ul style="list-style-type: none">• 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 - Bridging Communities

Merton Home Tutoring Service

Ref: 11288

Amount requested: £36,562

Adv: John Merivale

Base: Merton

Benefit: Merton

Purpose of grant request: 3 'Stepping Stone' (Basic English/ESOL) classes for migrants/refugees by volunteer qualified teachers and our home tutoring service - English to adults unable to access other classes.

Background

Merton Home Tutoring Service (MHTS) is a relatively new organisation established in 2009. It arose through the Founder's experience as a volunteer with Merton Asylum Welcome. She encountered a large unmet need for English language education which would suit older people, those caring for young children, those unable to pay, or those who have been so damaged by trauma as not to be able to venture outdoors. Backgrounds are as diverse as South American, Somali, other African states, Balkan or Palestinian. Many are highly educated, while others may not be equipped for academic exams. Statutory provision of English as a Second Language (ESOL) teaching tends to be for younger ages and examination based and employment focused.

The founder is a retired academic, who has been running the organisation entirely on a voluntary basis, while sufficient funding was awarded by Trust for London to pay a part-time Co-ordinator. Local charity the Wimbledon Guild has lent support in the form of free office and training space. Trustees include a former teacher, fellow trustees from the Asylum Welcome, a Solicitor, and a retired accountant as Treasurer.

Funding History

None.

Current Application

The request is for a contribution to salary and running costs for 'Stepping Stones', a programme of three classes, rising to four in years 2 and 3. MHTS provides English teaching in private homes (where necessary for pupils unable to get out), community halls, housing associations, and in a Women's Refuge from domestic violence and trafficking. All such situations are properly risk-assessed. The classes you are asked to support are in public venues. The co-ordinator is herself a qualified and experienced ESOL teacher, while the organisation uses a team of qualified volunteer teachers who are carefully trained for these specific circumstances - a pool of such is available owing to recent cuts in public provision. The aim is always to move people on to further English courses, to taking part in the public world, and to gradual assimilation in

mainstream society. There is also a drop-in service one day/week for practical support. The programme has been revised slightly in the period since original application. The request is now for three years from this month, and a revised table of costs is shown as Appendix A.

Financial Observations

MHTS depends on scant funding, and good will, but has received grants from Trust for London, Awards for All, and Merton Priory Housing Association. It became a registered charity in November 2010, and the year to 31st March 2012 is the first year in which its income has exceeded the £25,000 threshold at which the Charity Commission demands independently examined accounts. These accounts record income of £33,134 and an overall surplus of £12,700. This comprised a surplus of £10,987 on restricted funds and £1,713 on unrestricted activity. MHTS aims to build unrestricted free reserves equivalent to six months' running costs, which equates to £13,950 based on forecast expenditure in 2013/14. As at 31st March 2012, the charity held only £3,760 in unrestricted free reserves, equating to 1.6 months' worth.

For the current year to 31st March 2013, the charity forecasts income of £23,435 and, after expenditure of £24,295, a deficit of £860. It is planned to fund this from unrestricted reserves, thereby reducing them to £2,900 – which equates to 1.2 months' worth of expenditure and clearly below the reserves policy target to hold 6 months' worth at £13,950.

For the year 2013-14, MHTS plans expenditure of £34,975. Of this, £19,250 (55%) has been secured at the time of writing, while the balance of £15,725 has been applied for from various sources, including this request for £8,650. The charity recognises that this situation needs to be carefully managed and aims to keep costs to an absolute minimum: committed expenditure amounts to £27,900 (for room rental and the salary of the co-ordinator) with the balance of £7,075 subject to funding being secured. Meanwhile, the actual classes are maintained by the volunteers. Nevertheless, it is recommended that any grant be subject to a satisfactory update of the outturn for 2012-13 and budget for 2013-14.

Officer's Appraisal

The organisation shows an imaginative and very professional response to a real need, in straitened economic times. The use of committed volunteers, to teach a number now amounting to almost 100 people, results in exceptional value for money; while the social benefits are clearly offered with great sensitivity.

Recommendation

£34,120 over three years (£8,650; £12,490; £12,980) to provide basic English classes for migrants, refugees and other adults unable to reach other classes. The grant is conditional on a satisfactory update of the outturn for 2012-13 and budget for 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)

11288

Date Received:

6 July 2012

Programme
Area: 2

1. About your organisation

Name of organisation applying for grant: Merton Home Tutoring Service	
If the organisation is part of a larger organisation, what is its name? No	
Address for correspondence c/o Wimbledon Guild, Guild House, 30/32 Worple Road	
Postcode: SW19 4EF Is this your home address? No	
Contact person: Dr Ruth Dawson	Position: Manager & Trustee
Phone: 020 8946 4476	Fax:
E-mail: mertonhometutoring@gmail.com	
Website: Merton Home Tutoring Service	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1139126	
Year and month organisation established: 2009 January	

RECEIVED
The City Bridge Trust
06 JUL 2012
Box

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Bridging communities
Purpose for which funds are requested: (25 words maximum) 3'Stepping Stone' [basic English/ESOL] classes for migrants/refugees by volunteer qualified teachers and our home tutoring service - English to adults unable to access other classes.
How much funding is requested? Year 1: £9,582 Year 2: £13,259 Year 3: £13,921 Total: £36,562

3. Aims of your organisation

From our Constitution

- To advance the education of adults living in the London Borough of Merton, for whom English is a second language and for whom it is difficult to attend formal classes, by the provision of English language tuition in their homes[and elsewhere].
 - Such other charitable purposes as the Trustees shall from time to time determine.
- [i.e. last year, the Trustees determined that:-
- a. 'Stepping Stone' classes should be set up to enable learners to progress via this medium to attending formal courses at local colleges, to become active & integrated citizens and to obtain employment where this is possible.
 - b. the Service signposts learners to a wide variety of relevant information & advice, by various means, including the provision of specialist information booklets developed by our Service].

4. Main activities of your organisation

- We offer English tuition to any migrant or refugee. We recruit volunteer tutors & teachers from our local community.
- Continuous referrals enable us to carry out assessments of students in their homes for home learning or for classes. We introduce tutors to learners in their own homes; bespoke tuition, free of charge, is arranged, on a one-to-one basis for the learners who are unable to access classes;
 - We train all tutors, including induction training for our qualified volunteer teachers, & carry out follow-up reviews to monitor progress & evaluate our Service.
 - We have a weekly drop in/advisory session, with access to resources, to support tutors and teachers.
 - We have introduced local 'Stepping Stone' classes for adult learners ready to move on from home tutoring & also for others unable to attend mixed classes; not ready/ willing /able/cannot afford to attend formal exam classes, or for whom, currently, few classes at beginner level exist locally. We design & develop learning materials, e.g. booklets for adults at an early stage of English learning, which also provide information on everyday life in UK.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	1	10	40

6. How do you support your volunteers?

Volunteers are provided with support & advice on a continuous basis i.e. regular tutor & class supervision; ongoing update training sessions, provision of teaching materials/ equipment/photocopying; insurance & travel expenses.

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?
No. Rent free space.	Hopefully ongoing.

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	1,745
Activities for generating funds	957
Investment income	
Income from charitable activities	30,432
Other sources	
Total Income	33,134

Expenditure:	£
Charitable activities	18,923
Governance costs	107
Cost of generating funds	480
Other	924
Total Expenditure	20,434
(Deficit)/surplus for the year:	12,700

Asset position at year end	£
Fixed assets	
Investments	
Net current assets	14,747
Long-term liabilities	
*Total A	14,747

Reserves at year end	£
Endowment funds	
Restricted funds	10,987
Unrestricted funds	3,760
*Total B	14,747

* 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?
None

10. Material changes

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

The robustness of our service, commitment of volunteers, staff and Trustees remain the same. Our successful 'Stepping Stones'/ESOL classes, funded by awards for All until November 2012, need to continue. Increased demand for our services, class & material development & evaluation necessitates additional supervision time 7 Co-ordinator input.

11. Previous applications to the Trust

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

12. Previous funding received

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

	Year: 2008 ⁰⁹	Year: 2009 ¹⁰	Year: 2010 ¹¹
(i) Merton Small Grants [MVSC]	194		
(ii) LBM Regeneration, Investment &			
(iii) Renewal Annual Grant programme			
(iv) 2011-12			5425
(v)			
(vi)			

13. Previous grants received

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

	Year: 2009 ¹⁰	Year: 2010 ¹¹
Thames Community Foundation Grassr Awards for All	2555	2910
Trust for London 2010-'11 for Co-ordinators' salary 14hrsx36wks		9392
		12,705

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

A. THROUGH THE USE OF PUBLIC TRANSPORT
 Where our assessment visits are to homes easily accessible on foot, by bus, tram, train or tube, we deliberately choose to use them.

B. THROUGH SHARING ACCOMMODATION AND HOTDESKING
 We thus use space efficiently.

C. THROUGH LIMITING PURCHASES OF BOOKS
 We provide borrowable wallets of photocopied material, to lessen the need to photocopy. Our resource lending library reduces the number of books people need to purchase.

D. THE PROVISION OF UNPROCESSED FOOD AT TRAINING SESSIONS.
 We select, as far as possible, refreshments that have undergone minimal industrial food processing; i.e we provide fresh fruit and vegetables rather than biscuits, cakes, and other heavily processed food.

E. RE-USE OF ONE SIDED PAPER.
 We double side paper where possible, and print for unofficial use the unused side of paper we receive

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 FOR OUR SERVICE is substantial and growing, evidenced by Merton being a multi ethnic & multi lingual borough, with school statistics showing 50% ethnic minority children & 160 languages spoken. Experience from talking to 'Merton Asylum Welcome' clients, long waiting lists for English classes, 100 each at 3 Merton Childrens' Centres, overwhelming referral numbers, show adult migrants with an unmet need for English tuition. Inability to access English classes results in community isolation & not integration. Reasons may include disability, inability to pay for registration/crèche facilities, difficulty in negotiating public transport with children, husbands refusing permission, work that prevents attendance, rigidity of college starting times, insufficient classes, illiteracy and ignorance of adult education in the UK.
- DELIVERY OF WORK. A substantial amount of our tuition is home-based but accommodation has to be sought and funded for our 'Stepping Stones'/ESOL classes. We have suitable premises at present and, with funding, these will continue from January 2013. We have agreement from three qualified volunteer teachers to teach the classes. The Wimbledon Guild has agreed to provide a training room when needed, house our teaching resources & provide one day a week office space. At present we have trained volunteers, a volunteer Manager and a part time salaried Co-ordinator.
- THREE CLEAR OBJECTIVES OF OUR SERVICE ARE
 1. We enable adult migrants and refugees, who are in great need, to learn English.
Outputs of adults taught English:3 classes [34 adults], home learners [35].
Outcomes: Increased knowledge of English enabling 15 learners to apply for college places next September 2012; out of 10 illiterate learners, 2 are now literate & 8 progressing well; with improved English, at least 10 adults have secured part-time jobs. Individual confidence has increased, evidenced by feedback e.g 'My mother is much more confident now.' 'H is so kind, teaching my wife English for the hospital appointment, for her baby.'
 2. We give excellent training and support for volunteers.
Output: 3 x 18 hour training courses annually, 42 advisory sessions, 5 update meetings, 4 induction courses and 3 staff meetings for class teachers. National Association for Voluntary Teachers of English founded & operating.
Outcomes: effective and respected tutors: Ashanti Asian Womens' Refuge reported: 'Your tutors have enabled women to make considerable progress in self confidence & the ability to act independently- 4 have gained work, 4 passed exams in English, driving & food hygiene.'
 3. Progress in knowing how things work in the UK, leading to understanding & community participation.
Outputs: Learning materials & information booklets in basic English, plus learning from tutors.
Outcomes: Learners better informed, able to access to services - 'My mother can now ring the gas suppliers.' Tutors report: 'M rang the doctor by herself' 'R goes to a Mother & Toddler group now.' 'N and I astonish each other: she has taught me such a lot about Afghani society, and I her about Britain.'
- THE RIGHT ORGANISATION. We have considerable & relevant experience already: we attract highly educated volunteers, multicultural with excellent English; we provide a well regarded training course. The Trustee Board include a lawyer, 2 chartered accountants, 1 project manager, 1 business woman, 2 ESOL teachers, a refugee group leader. The Manager & Co-ordinator are experienced ESOL teachers, the former experienced in school inspection & both in home tutor training & programme management of refugees, with a PhD in training evaluation.
- BRIDGING COMMUNITIES is the result of what we do and was inherent in our philosophy from the start. Home tutoring & our classes have resulted in isolated adults with no English, and lacking in confidence, enabled to get into educational establishments, find work and begin to participate in mainstream activities. Learning is reciprocal for tutors and learners.
- GOOD PRACTICE: 3 volunteers have joined our Trustees; all referrals assessed; a learner employed to set up library shelving; placement provided for a learner's daughter to gain experience in admin.
- APPLICATION FOR EXISTING POST EXTENSION ENCLOSED

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

- Initial assessment of students measures students' English language levels. Learning goals are agreed by tutors & teachers. Review visits & staff feedback are compared to initial assessments to show the progress in English, further study requirements, employment prospects etc.,
- Tutors' 'Records of teaching' are sent at 2 monthly intervals to the Co-ordinator for analysis.
- Evaluation evidence is obtained through Manager's termly visits to classes, termly staff meetings and reports/comments from volunteers & update meetings. Phone calls & emails are noted.
- Tutor Course evaluation sheets are used to develop & enhance Tutor Training.
- Tutors, teachers and learners agree 3 learning goals which the Co-ordinator assesses on visits to tutors and learners at home after 6 months of classes.
- Up date meetings & advisory sessions facilitate tutor feedback.
- Learners' comments, formal and informal, are retained in our evaluation file for reference.
- Questionnaires for learners on their experience of our Service have now been developed.

17. Beneficiaries

How many people will benefit from the grant per year? **30 in classes, 8 in a conversation class and 36 home tuition:74**

In which local authority is your organisation based?
London Borough of Merton: all figures Q.17 based on current figures.

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
85% Merton, rest from Wandsworth & Sutton

At what address will the activity be located? **Homes, family centres, church hall, library in Merton borough.**

What age group will benefit? **20-60**

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

	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	8
White - Other (please describe) Polish, Ukraine, Russ	16	Black - Other (please describe)	
Asian - Indian	8	Black - British	
Asian - Pakistani	14	Chinese	
Asian - Bangladeshi	3		
Asian - Other (please describe) Sri Lanka, Afghan, Mauriti	38	Other (please describe) Middle East, South Americ	13

Open to everyone

What proportion of the beneficiaries will be disabled people?
5%

18. Funding required for the project

Superseded - see Appendix

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 £
9 Terms Autumn 2012 - Summer 2015				
Class A: rental	1,080	1,080	1,080	3,240
Class B: rental	1,080	1,080	1,080	3,240
Class C: rental & creche	5,896	5,896	5,896	17,688
Class D: Free rental	0	0	0	0
AGM & Annual report	200	200	200	600
Office, training room & photocopying	0	0	0	0
Phone Bill	510	510	510	1,530
Volunteer expenses	270	100	100	300
Co-ordinator: 3 hrs x 36 wks x £23	2,484	2,484	2,484	7,452
Admin: 4hrs x 9.85 x 36 weeks	1,418.4	1,418.4	1,418.4	4,255.2
Totals without inflation	13,508.	13,508	13,508	40,525
Totals 5% inflation				
TOTAL	13,508	14,183	14,892	£42,583

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
		0	0	
Awards for All: Year 1 Class C term 1	1,965	0	0	1965
-Year 1 Class A terms 1,2,3	1,080	0	0	1080
Merton Priory Homes Phone & AGM	570	0	0	570
TOTAL				4115

What other funders are currently considering the proposal?

Deutsches Bank: Grant of £2, 400 to cover term Spring 2013 for class C

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 £
9 Terms: Autumn 2012 - Summer 2015				
Class A: rental	0	1,080	1,080	2,160
Class B: rental	1,080	1,080	1,080	3,240
Class C: rental, creche Year 1 terms 2&3	3,930	5,896	5,896	15,722
Rental, creche Yrs 2,3				
Phone	200	200	200	600
Volunteer expenses	270	270	270	810
Salary: Co-ordinator 3hrs x 36 wks x £23	2,484	2,484	2,700	7452
Salary: Admin 4hrs x 36 x £9.85	1418	1,418	1,418	4,255
AGM & annual Report	200	200	200	600
	9582	12,627	12,627	£34,837
plus 5% to allow for inflation				
TOTAL	9582	13,259	13,921	36,762

20. Funding requested from the Trust (continued)

When will the funding be required? October 2012
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes, as long as it is needed. We hope to run at least one fundraising event annually, sell information booklets and apply to Trusts for the remainder.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? None

Declaration on behalf of applicant organisation

I, Dr. Ruth Dawson (your name) am an authorised representative of Merton Home Tutoring Service (your organisation) within which I am Manager and Trustee (your position) To the best of my knowledge, all the information that I have provided in this application form is correct Signature <i>Ruth Dawson</i> Date <i>3rd July 2012</i>

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

ref: 11288

Appendix A:
Revised request

Application to City Bridge Trust

Revised Question 18

Expected costs of MHTS (Core costs)

	Year to			
	31-Mar-14	31-Mar-15	31-Mar-16	
	£	£	£	
Class A	1,300	1,500	1,750	
Class B	750	1,000	1,200	
Class C	2,800	4,000	4,250	
Class D	100	1,000	1,200	
Class E (New class in 2015-16)	-	-	-	No charge for room in Year 1 if need, and funded
AGM and governance costs	200	250	300	
Training of tutors	2,375	3,000	3,500	
Books and teaching aids	-	600	750	£550 in 2014, if funded
CRB checks	250	400	500	
Conferences - training for staff/trustees		1,500	1,500	£1,500 in 2014, if funded
Insurance	450	500	550	
Staff costs	15,375	21,000	22,000	Additional staff £4,525 in 2014, if funded
Telephone	400	600	700	
Stationery	350	450	550	
Postages	250	350	450	
Events with learners	200	250	400	
Equipment		500	500	£500 in 2014, if funded
Commissioning booklets	2,400	1,000	2,500	
Sundries	100	150	200	
Volunteer expenses	600	600	700	
	27,900	38,650	43,500	

Budget for year to 31 March 2014 excludes projects/ costs of £7,075 which will only be incurred if funding is obtained. These costs are included in the 2015 and 2016 budgets

Revised Question 19

Funding Request

	Year to			
	31-Mar-14	31-Mar-15	31-Mar-16	
	£	£	£	
Class A - Acacia Room rental	1,300	1,500	1,750	Costs to July 2013 are prepaid
Class B - St Barnabas Replacement- Room Rental	750	1,000	1,200	Reduced rental costs in 2014
Class C- St Marks- Room Rental	2,800	4,000	4,000	Costs to July 2013 are partly prepaid
Class D- Garfield School- Room rental	100	1,100	1,100	No rental charge for first year - 2014
Tutor training costs	300			
Telephone and postage	100	-	-	
Volunteer expenses	350	350	350	
Salary - Coordinator/Admin help	2,750	3,750	3,750	
Cost of AGM and Annual Report	200	200	200	
	8,650	11,900	12,350	
Add increase in costs at 5%	-	595	625	
	8,650	12,495	12,975	
Total over 3 years		£	34,120	

ASSESSMENT CATEGORY - Bridging Communities

British Muslims for Secular Democracy

Ref: 11313

Amount requested: £45,000

Adv: Jenny Field

Base: Camden

**Benefit: Tower Hamlets &
London-wide**

Purpose of grant request: A contribution towards the Director's salary and overheads.

Background

British Muslims for Secular Democracy (BMSD) was established in 2006 both to oppose extremism in Muslim communities and to combat Islamophobia in the media and wider society. It encourages the civic engagement and responsible citizenship of Muslim communities in Britain and the building of shared values amongst all citizens to live in an inclusive, secular and democratic society. Its trustees include the journalist and commentator, Yasmin Alibhai-Brown.

BMSD works at the grass roots level and also contributes to the wider policy debate through the media, conferences and seminars. It works collaboratively with other relevant organisations, for example, it worked with the Citizenship Foundation (which you have supported previously) on an 18 month programme working with 16 - 21 year olds, mostly undergraduates, on their experiences as young Muslims living in Britain.

Funding History

None

Current Application

You are asked to contribute towards the Director's salary over the next three years and to the charity's general running costs. The Director is currently funded for 3 days a week (her hours were reduced from full-time in October 2012 due to lack of funds) but BMSD would like to make the post full-time and have resources for some administration support. This would enable the continuation and development of two projects that BMSD is currently involved with. It is working in partnership with Praxis (an organisation you have funded on several occasions) to deliver workshops in civic engagement which enable participants to better understand how to be active citizens. The workshops aim to raise awareness about secular democracy, encourage understanding and respect for different belief systems and to raise awareness about civil rights and the democratic process. To date, these have taken place in Tower Hamlets.

The second piece of work is its interfaith social action project. It has recently started to work with the Three Faiths Forum (which you are currently funding), the Islamic Society of Great Britain, City Sikhs (a network of professionals from the Sikh community) and Limmud (a Jewish educational charity). The aim of the project is to bring people together from different faith communities to look at practical issues of shared concern, such as intergenerational relations, and to share good practice amongst different faith communities in London.

Financial Observations

The financial information provided in Question 8 of the application is taken from BMSD's last set of audited accounts, which are for the year ended 31st August 2011 and show a deficit of £10,407 (26% of turnover). The charity's reserves policy states that it aims to hold a minimum of three months' worth of running costs in reserve. As at 31st August 2011, unrestricted free reserves amounted to £29,065 which equated to seven months' worth of total expenditure in that year.

Draft accounts for the following year to 31st August 2012 show an overall deficit of £14,582 (56% of turnover). This comprises planned deficits of £6,927 on restricted funds and £7,655 met from unrestricted reserves. The balance sheet shows that unrestricted free reserves reduced to £22,409, however, due to the reduction Director's hours, projected expenditure in the current year 2012/13 has reduced to £23,289 (2011/12: £40,449), the free reserves holding now represents 11.5 months' worth of expenditure. The lower expenditure in 2012/13 reflects the completion of time-expired funding from the Trust for London.

An overall surplus of just over £4,000 is projected for 2012/13.

Officer's Appraisal

Whilst very small, BMSD plays an important role in fostering community cohesion and increasing understanding amongst different cultures. At the time of assessment, BMSD was in receipt of a three year grant from the Joseph Rowntree Charitable Trust (JRCT) which is due to end in September 2013. A further application will be submitted to JRCT and applications to other trusts and foundations are currently awaiting a decision. It is therefore recommended that if you approve a grant today, it is conditional on the Trust not being BMSD's single largest funder.

Recommendation

£45,000 over three years (3 x £15,000) towards the Director's salary and other running costs of BMSD, on condition that the Trust is not the charity's single largest funder.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11313

Date Received:

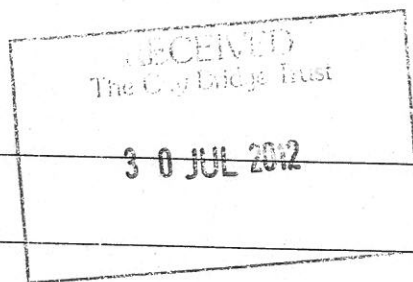
24/07/2012

Programme
Area:

02

1. About your organisation

Name of organisation applying for grant: British Muslims for Secular Democracy	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: 37 Museum Street London	
Postcode: WC1A 1LQ Is this your home address? No	
Contact person: Ms Tehmina Kazi	Position: Director
Phone: 02072428691	Fax:
E-mail: director@bmsd.org.uk	
Website: http://www.bmsd.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1122730	
Date organisation established: 14/08/2006	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Bridging Communities
Purpose for which funds are requested: (25 words maximum) A contribution towards the Director's salary and overheads
How much funding is requested? Year 1: £15,000 Year 2: £15,000 Year 3: £15,000 Total: £45,000

3. Aims of your organisation

British Muslims for Secular Democracy (BMSD) has been working since 2006 to oppose extremism in Muslim communities; combat Islamophobia in the media and wider society; and promote both civic and cultural engagement of Muslims with the indigenous population.

Our aims are:

- to raise awareness among British Muslims and the wider public, of a shared vision of citizenship and sense of belonging, underwritten by ideas of a secular democracy.
- to empower marginalised members of the British Muslim communities to become active participants in their society at the local and national levels
- to promote harmony between communities of different cultures, religions and backgrounds
- to encourage an understanding and celebration of the variety of Muslim cultures, values and traditions, now embedded in British society.

4. Main activities of your organisation

To achieve these aims we work in four main areas: Education and Training, Research, Cultural Exchange, and Lobbying and influencing. This includes:

- facilitating discourse and raising awareness of democracy and its benefits
- raising awareness of religious influence on UK domestic and foreign policies, particularly those which may lead to undue effect on civil liberties
- vigorously rebutting and condemning extremist views and actions
- empowering Muslim communities to become active participants in their local communities
- improving the sense of belonging and citizenship within Muslim communities
- advocating issues that affect Muslim communities at all relevant decision making levels, and within service provision sectors
- engaging with marginalised Muslim communities, and helping to identify root causes of deprivation and social exclusion, and help work towards a solution
- providing a lively and interesting social/educational programme which showcases the variety of Muslim histories, cultures, values and traditions in the UK today

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
1	0	8	5

6. How do you support your volunteers?

We accept that different volunteers are able to offer different levels of involvement at different times. We have built volunteers' self-esteem by giving them a sense of ownership over their work. The Director recommended one volunteer on LinkedIn, and assisted another with his own enterprise.

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	For renewal in October 2012

8. Finance

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

Financial year ended - **Month: August**

Year: 2011

Income received from:	£
Voluntary income	39,335
Activities for generating funds	0
Investment income	61
Income from charitable activities	0
Other sources	0
Total Income	39,396

Expenditure:	£
Charitable activities	48,015
Governance costs	1,788
Cost of generating funds	0
Other	0
Total Expenditure:	49,803
(Deficit)/surplus for the year:	(10,407)

Asset position at year end:	£
Fixed assets	1
Investments	0
Net current assets (liabilities)	37,992 37,990
Long-term liabilities	0
*Total A:	37,993

Reserves at year end:	£
Endowment funds	0
Restricted funds	7,927
Unrestricted funds	30,066
*Total B:	37,993

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

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
0%

10. Material changes

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

We have received £5,000 in core costs from the Garfield Weston Foundation, and £2,000 for a one-off project from the Evening Standard Dispossessed Fund.
Dr Wannette Tuinstra, the Human Rights Outreach Officer, was employed on a one-year contract from November 2010 to November 2011. She worked 14 hours per week.
Bashiera Rosser-Owen joined the Board of Trustees in December 2011, and contributed fundraising expertise.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:			
Month/Year:	Ref:	Grant received:	CR 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)			
(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
Joseph Rowntree Charitable Trust	4,200	18,150
Trust for London	20,000	20,000
Evening Standard Dispossessed Fund		2,000
Garfield Weston Foundation		5,000

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

We have adopted certain measures recommended by the 10:10 climate campaign. For example, we keep electronic devices to a minimum, and retain them for at least four years. Instead of using a desktop computer, we have a laptop (which is always turned off at the end of each day).

We buy or borrow second-hand books, and share stationery and office space with a Human Resources Consultant.

We only print hard copies of documents when it is absolutely necessary, and even then, we prefer to use two-sided copying.

We try to use dishes and utensils instead of paper plates.

The Director always takes public transport 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 1.5 before completing this section.

The most compelling evidence for these projects is the peer research conducted by the Fitzrovia Youth in Action on Muslim identity and community cohesion. It clearly demonstrates that there are issues of concern amongst young members of the Somali and Bangladeshi community. Overwhelmingly, young Muslims do not feel that the contribution of Muslims to British society has been recognised, more Muslim role models are needed and the Government does not listen to the Muslim community. 97% felt that there should be more opportunities for young Muslims and non-Muslims to work together to understand each other better. 57% felt that there were not enough Muslim youth workers in Camden.

Nationally, the Citizenship Survey produced by the Department of Communities & Local Government highlights a decrease in the percentage of people who feel they are able to affect decisions in their local community. This is also reflected in the trends with regards to ability to affect national decisions.

When the Citizenship Foundation consulted organisations across London, they found that there were a lack of engagement opportunities being taken up by young people from communities impacted by conflict and newly arrived asylum seeker and refugee communities, as evidenced by the London Empowerment Map project.

We seek to develop two existing active citizenship projects; one with refugees of different backgrounds, and an interfaith social action project.

BMSD has undertaken 12 democracy workshops with refugees at the Bethnal Green charity Praxis, from 2008 until the present day; more are planned. The objectives are to increase refugees' knowledge of civic engagement opportunities, and to raise their confidence in seizing them. Each BMSD democracy workshop has between 12 and 18 participants, and the Director takes an active role in facilitation. Participant feedback has been very strong e.g. one person remarked that it presented "higher educational opportunities for refugees." Other participants stated that the workshop taught them "how to communicate with different religious groups" and "how to live together with different religions."

We have also organised a series of interfaith action sessions since November 2011. The objectives are to unite people from different faith communities in addressing practical issues of shared concern, such as intergenerational relations. We are planning a major event in Spring 2013, with smaller events in the interim. Another key objective of this project is to share good practice among different faith communities in London. Meetings have already taken place in a variety of different settings, such as the Central London gurdwara and the Buddhist Society Hall.

We believe we are the right organisation to carry out this work, because we are the only organisation which works equally to combat both Islamophobia and Muslim extremism, and the injustices perpetrated against Muslim communities and those that take place within them. We have a strong track record across all this work.

Our organisation comprises experts and experienced practitioners in the fields of community development, Islamic theology, political participation, the mainstream media, BME cultural activities and equality and human rights. We currently employ just one full-time member of staff (the Director) who is supported by volunteers and a very active board of trustees.

Both projects have demonstrably united people from different backgrounds, strengthened community relations and engendered a sense of belonging for the participants. The interfaith meetings have featured stakeholders from Christian, Jewish, Sikh, Hindu, Muslim, humanist, and Buddhist backgrounds. The democracy workshops have welcomed people from countries including Bangladesh, Somalia, Pakistan, Iraq and Italy. We have tailored these workshops according to the needs of particular service users, and regularly review our monitoring forms in this regard.

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

We will measure the democracy workshop outcomes by asking relevant questions on our monitoring forms. We will measure the interfaith social action outcomes through the quality of feedback generated by our events. We have established a social media portal, to enable people to inform us about any social action initiatives they may have taken (or good practice they may have shared) as a result of our project.

We will write an evaluation report for both projects, taking into account the number of beneficiaries, but more importantly, the extent to which their needs and expectations were met.

17. Beneficiaries

How many people will benefit from the grant per year? 100			
In which local authority is your organisation based? Camden			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Camden and Tower Hamlets			
At what address will the activity be located? Various London boroughs, particularly Tower Hamlets			
What age group will benefit? Adult, over 16 years			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British	15	Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani	70	Chinese	
Asian - Bangladeshi	15		
Asian - Other (please describe)		Other (please describe)	
			Open to everyone
What proportion of the beneficiaries will be disabled people? 0%			

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
	£	£	£	£
Director's salary (including National Insurance)	31,000	31,000	31,000	93,000
Office rent	4,000	4,000	4,000	12,000
Utilities	1,000	1,000	1,000	3,000
Report printing and dissemination	2,000	0	0	2,000
Workshops and other events	1,952	1,000	1,000	3,952
Telephone and postage	600	600	600	1,800
IT support	400	400	400	1,200
TOTAL	40,952	38,000	38,000	116,952

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

Source	Year 1	Year 2	Year 3	Total
	£	£	£	£
Garfield Weston Foundation	5,000			5,000
Joseph Rowntree Charitable Trust	24,971			24,971
Evening Standard Dispossessed Fund	2,000			2,000
European Foundation for Democracy	1,952			1,952
TOTAL	33,923			33,923

What other funders are currently considering the proposal?

Funder	£
Barrow Cadbury Trust	10,000
JP Getty Charitable Trust	30,400
Mercers Company	15,000
Volant Charitable Trust	15,000
TOTAL	70,400

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
	£	£	£	£
Director's salary contribution	14,000	14,000	14,000	42,000
Utilities	1,000	1,000	1,000	3,000
TOTAL	15,000	15,000	15,000	45,000

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">20/11/2012</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes, and we have already secured part of the funding from other sources. We have a fundraising strategy in place in order to raise further funding from alternative trusts and foundations.
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>Tehmina Kazi</u> (your name)
am an authorised representative of <u>British Muslims for Secular Democracy</u> (your organisation)
within which I am <u>Director</u> (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature <u>T. Kazi</u> Date <u>25/10/2012</u>

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

Please

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

MEETING 18/04/2013

ANNEX NUMBER: 5

ASSESSMENT CATEGORY - Improving Londoners' Mental Health

Latin American Women's Aid

Ref: 11365

Amount requested: £96,560

Adv: Sandra Davidson

Base: Hackney

Benefit: London-wide

Purpose of grant request: To improve mental health of children & their mothers who survived domestic violence and are from a marginalised migrant community (Latin America).

Background

Latin American Women's Aid (LAWA) was established in 1987 to provide a safe environment for Latin American women and children affected by domestic violence. It provides temporary accommodation and practical advice and information to help with their resettlement. The refuge promotes women's independence and self-reliance on a non-judgemental basis. As well as running its refuge, accommodating up to six families at a time, LAWA runs a full-time advice and advocacy service for Latin Americans who are survivors of domestic violence but who are not ready to go to a refuge. Here, women can access legal advice and guidance on family law, domestic violence and children's rights; get help with finding solicitors, GPs and schools; advice on welfare rights and housing; support in contacting the police, benefits agencies and immigration departments; and referrals to counselling services and other relevant agencies. LAWA has recently developed the Samira Project working in partnership with the IMECE Women's Centre.

Funding History

You have funded LAWA twice before: in April 2000 with a grant of £34,000 over three years towards a children's services project; and in February 2007 with £76,000 over three years for a broadly similar purpose. Most recent monitoring was assessed as 'good'.

Current Application

Officers have previously brought to your attention the needs of children and young people affected by domestic violence, in particular their mental health. You commissioned a joint report from NSPCC and Refuge to gain a clearer picture of the needs of children in London. The impact of violence on young people and children can be severe. The long term impact of domestic violence on children includes increased levels of attention deficit disorder, anxiety, stuttering, and asthma; reduced educational attainment and increased involvement in anti-social behaviour; street and playground violence. One of the key findings of your report was the significant gaps and shortages in services addressing the needs of children and young people living with domestic violence in London.

LAWA is asking for funds to engage a part-time Family Outreach Support Worker to co-ordinate and manage its support services to children and young people and their mothers who cannot or do not wish to use refuge services, having overcome the initial impact of domestic violence. The provision of support services for children and young people is a critical element of the range of services that are needed to help families survive domestic violence. The postholder will work closely with families in the local community, offering a wide range of support tailored specifically to each individual's needs.

If successful, it is envisaged that up to 90 children and young people will be supported annually. A key component of the role is to develop links with local community services and build close working relationships with schools and children's centres. A pilot version of this project led by a specially trained volunteer 1 dpw for a year has proved very successful and has supported 30 children and young people and 13 mothers.

Financial Observations

The accounts for the year ended 31st March 2012 show an overall deficit of £1,660 (0.6% of turnover), which comprised a surplus on restricted funds of £6,381, offset by a deficit of £8,041 on unrestricted activity. The charity's reserves policy aims to hold three months' worth of core costs which equated to approximately £48,000 in 2011/12. At the year-end 31st March 2012, unrestricted free reserves amounted to £31,059 which equates to 2 months' worth.

LAWA has been funded for many years by its local authority (approximately 37% of total income) and has received grants from other sources including the Big Lottery and BBC Children in Need. The organisation anticipates breaking even in 2012/13 and 2013/14.

Officer's Appraisal

LAWA is well connected and is influential in the domestic violence field. Its General Manager attends a number of meetings including the Multi-Agency Risk Assessment Conference (MARAC), Housing Working Group and Supporting People Forum. LAWA is also a member of Islington's Violence against Women's Sub-Group and Imkaan, the infrastructure support body for organisations working on gender violence issues. The appointment of a part-time Family Outreach Support Worker is vital to help improve the health and well-being of highly vulnerable children and young people and their families. This proposal meets the priorities of your mental health needs of children and young people theme.

Recommendation

£96,500 over three years (£32,500; £32,000; £32,000) for the salary of a p/t (28hpw) Family Support Outreach Worker and associated costs supporting the mental health needs of children and young people affected by domestic violence.



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)

11365

Date Received:

06/09/12

Programme
Area:

3.

1. About your organisation

Name of organisation applying for grant:
Latin American Women's Aid

If the organisation is part of a larger organisation, what is its name?
n/a

Address for correspondence
**The Print House,
3rd Floor, 18 Ashwin Street
London**

RECEIVED
The City Bridge Trust

06 SEP 2012

Postcode: **E8 3DL**

Is this your home address? **No**

Contact person:
Ms Stephanie Orel

Position:
General Manager

Phone: **02072750321**

Fax:

E-mail: **stephanie@lawadv.org.uk**

Website: **www.lawadv.org.uk**

Legal status of organisation: **Charity**

If registered, please give charity number: **299975**

Year and month organisation established: **Sept 1988**

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)?

Improving Londoners' mental health

Purpose for which funds are requested: (25 words maximum)

To improve the mental health of children & their mothers who survived domestic violence and are from a marginalised migrant community (Latin America) through emotional and practical support services.

How much funding is requested?

Year 1: £ 32,520 Year 2: £32,020 Year 3: £32,020

Total: £96,560

3. Aims of your organisation

To empower Latin American (LA) women and their children who are fleeing from domestic violence to start a new life and facilitate their integration into the wider UK society through tailored advice & advocacy services as well as emergency accommodation.

- Helping women to recognise when they are affected by domestic violence and identify the dynamics of abuse
- Empowering women to become independent and take control of theirs & their children's lives
- Providing the practical and emotional support BME women and children need to exit a violent home and helping them overcome their additional barriers to safety such as language, insufficient knowledge of the UK system, fear of the UK authorities.
- Being a portal of integration by encouraging women to become active members of society
- Helping to increase awareness and shared knowledge of issues facing BME women & children

4. Main activities of your organisation

We run an advice and information centre, a women's refuge and various workshops.

Overview Advice & Information Centre (FT =Full Time, PT = Part Time):
 DV Advice & Advocacy Project (FT): providing advice & advocacy on personal safety planning, emergency interventions, criminal justice remedies, housing, welfare benefits, providing access to counselling, solicitors, community activities, ESOL classes, support for children and resettlement. London wide, via personal appointments or telephone/email.
 Samira Project (PT): similar as above, with the addition of outreach surgeries in the local community which are also accessible to women from other ethnic minorities. London wide.
 Pilot Family Outreach Project (PT): providing practical and therapeutic support to children and mothers, who require therapeutic interventions due to the emotional damage caused by the traumatic experiences of abuse, increasing mental health and well-being .
 Overview Refuge: Refuge Worker (FT): providing emergency accommodation, advice on housing & welfare benefits, community activities and ESOL classes.
 Children's Support Worker (PT): supporting children to overcome their traumatic experiences, rebuild the relationship with their mothers and integrate into the community.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
3	3	6	3

6. How do you support your volunteers?

Through a comprehensive induction to our services and policies, training plans tailored to their individual needs and regular feedback meetings (monthly). We also encourage volunteers to participate in key strategic planning events and meetings.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Renewed annually(last 6y)

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	112,470
Activities for generating funds	0
Investment income	155
Income from charitable activities	159516
Other sources	
Total Income	272,141

Expenditure:	£
Charitable activities	270358
Governance costs	3443
Cost of generating funds	
Other	
Total Expenditure	273801
(Deficit)/surplus for the year:	(1660)

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	43849
Long-term liabilities	0
*Total A	43849

Reserves at year end	£
Endowment funds	0
Restricted funds	12790
Unrestricted funds	31059
*Total B	43849

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

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
40.6%

10. Material changes

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

None

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	/	2006	Ref:	Grant received: £38250	OR application rejected	<input type="checkbox"/>
Month/Year: Apr	/	2008	Ref:	Grant received: £56875	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) L.B of Islington	166876	124456	84,213
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

13. Previous grants received

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

	Year: 2010	Year: 2011
Big Lottery Fund	12047	61100
Help a London Child	1000	1000
Rents & Mgmt Charges	48844	59984

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

- Renting offices at Print House which is a building powered by 70% solar energy from its own solar panels on the roof. The solar photo voltaic (PV) panels are the biggest solar installation of its kind in London and are made up of 184 square metres of photovoltaic roof tiles. These generate 21,000 kilowatt hours of electricity a year whilst saving over 12 tonnes of carbon dioxide. This makes The Print House one of the most productive PV roofs (per sqm) in the UK. At the weekends when the electricity use is lower it exports power to the national grid.
- All management committee members, employees and volunteers commute to and from the office either on public transport or by bicycle. Currently four team members cycle to the office on a daily basis, one of which even cycles to our Hackney based office from Brixton (20 miles per day to and from the office).
- Increasing use of electronic files, data archives and casework forms.
- Recycling paper, glass and print cartridges (at specialised recycling sites).

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.

LAWA has worked with Latin American survivors of domestic violence (DV) for 25 years and repeated consultations with our service users have indicated a strong need for a Family Outreach Support Worker specifically addressing the needs of children and young people (CYP) and their mothers who cannot or do not wish to use refuge accommodation. Although our advice services address the needs of women holistically and provide protection along statutory lines to children, we have identified a substantial gap in support services for CYP to overcome the long-term effects of the violence they experienced.

Mothers who are recovering from the trauma of abuse usually struggle to meet the aspirations and emotional needs of their children. They often face a range of problems such as unemployment, overcrowded housing, poverty, poor parenting skills and child protection issues (4). Assisting and empowering them in their role as mothers is of critical importance to ensure CYP can improve their mental health and life choices.

With 113,500 people the Latin American community in London is substantial yet one of the most marginalised ethnic minority communities (1,6). Generally 40% of women (and CYP) from ethnic minority backgrounds tend to stay in abusive relationships for 5 years or more, typically due to lack of knowledge of their rights and fear of approaching agencies for help. In 75-90% of violent incidents children are in the same or next room (2,3). In these cases CYP often develop needs for specialised assistance as they have either constantly witnessed harrowing scenes of violence or been subjected to abuse themselves. Many are at risk of suffering long term mental health impacts, schooling problems, or might even get into trouble with the law, which not only adversely affects their chances in life but also the family's mental health and wellbeing.(2)

Having a Family Outreach Support Worker would enable us to reach at least 4 times as many CYP and a wider age group than we can reach at the moment. This would empower at least 80-90 CYP per year to have a stronger voice in their own development, express their emotions, break their isolation and improve their mental health.

Objective 1: Latin American children and young people receive support which facilitates their long-term recovery from their exposure to, and experiences of, DV.

Objective 2: Latin American children and young people improve their mental health and wellbeing, raise their self-esteem and gain perspectives for the future.

Objective 3: Latin American children and young people receive tailored guidance which enhances their personal development and helps them attain their individual goals.

Objective 4: Latin American mothers increase their ability to meet their children's needs and enhance the wellbeing of their families.

A specially trained volunteer has been delivering a 1 day/week pilot version of this project at LAWLA since December 2011 and has supported 30 CYP and 13 mothers. 100% of these clients were highly satisfied with this service and asked for it to continue as it enabled them to significantly improve their mental health and life choices.

LAWLA has 25 years of experience in working against DV, providing a culturally sensitive service aimed at the particular needs of marginalised migrant women and CYP fleeing from DV. Our experience in providing highly effective support services to CYP in our refuge have enabled us to develop this project which will allow us to reach an increased number of vulnerable CYP and their mothers in their homes. This project meets the "Improving Londoner's Mental Health" theme, by supporting CYP and their mothers in London affected by DV and preventing long term mental health damage as a consequence (5). It will directly address the effects of DV on the beneficiaries and aims to help them cope in the short and long term to ensure their risk of developing serious mental health problems is significantly reduced. We meet the CBT principles of good practice through 1) involvement of beneficiaries through regular consultations, 2) welcoming women and children from all Latin American countries and other Spanish/Portuguese speakers, 3) regular training for volunteers and involving them in strategic project development, 4) located in a building using 70% solar power, encouraging all staff & volunteers to use public transport/cycle to the office and recycle wherever possible

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

Levels of psycho-social health and wellbeing will be measured through a specialised wellbeing index survey targeting CYP and their mothers. The target for a three year period is 40 families (140 people) per year, totaling approximately 120 families (420 people) in total. Needs assessments will be conducted on an individual and family basis and progress towards meeting those needs will be measured through quarterly reviews. Increased awareness by service users of the impact of DV on the family will be measured through a knowledge, attitudes and behaviour survey.

Monitoring data for this project will be gathered by the caseworker on a weekly basis. It will then be evaluated monthly during the caseworker's supervision sessions and through quarterly evaluation reviews to ensure adequate progress towards the project objectives and outcomes. Baseline data to evaluate impact will be gathered in year one and subsequently in years two and three to monitor progress.

17. Beneficiaries

How many people will benefit from the grant per year?		140	
In which local authority is your organisation based? On the border of Islington and Hackney			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) All London boroughs			
At what address will the activity be located? The Print House, 18 Ashwin Street, London E8 3DL and family's homes			
What age group will benefit? 0-60 years			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British		Black - Caribbean	
White - Irish		Black - African	
White - Other (please describe) Spanish & Portuguese	20	Black - Other (please describe)	
Asian - Indian		Black - British	
Asian - Pakistani		Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe) Latin American	80
Open to everyone			
What proportion of the beneficiaries will be disabled people? Typically not many disabled people approach our services, last year 1% but we are open to receiving clients with disabilities.			

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 £
Family Outreach Support Worker (4days/w)	25,144	25,144	25,144	75,432
Staff Supervision	1,076	1,076	1,076	3,228
Staff Training & (incl Conferences)	600	600	600	1,800
Staff Recruitment	500			500
Travel & Subs	300	300	300	900
Office Rent, Rates, Heat & Light	1,500	1,500	1,500	4,500
Repairs & Maintenance (Cleaning)	300	300	300	900
Printing, Postage & Stationery	650	650	650	1,950
Insurance	150	150	150	450
Telephone, Sundries, Subscriptions	750	750	750	2,250
Legal & Professional Fees (incl Audit)	350	350	350	1,050
Activities for Users	1,200	1,200	1,200	3,600
TOTAL	32,520	32,020	32,020	96,560

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

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

What other funders are currently considering the proposal?

None yet.

19. Funding requested from the Trust

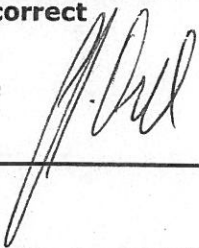
How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Family Outreach Support Worker (4days/w)	25,144	25,144	25,144	75,432
Staff Supervision	1,076	1,076	1,076	3,228
Staff Training & (incl Conferences)	600	600	600	1,800
Staff Recruitment	500			500
Travel & Subs	300	300	300	900
Office Rent, Rates Heat & Light	1,500	1,500	1,500	4,500
Repairs & Maintenance (Cleaning)	300	300	300	900
Printing, Postage & Stationery	650	650	650	1,950
Insurance	150	150	150	450
Telephone, Sundries, Subscriptions	750	750	750	2,250
Legal & Professional Fees (Incl Audit)	350	350	350	1,050
Activities for Users	1,200	1,200	1,200	3,600
TOTAL	32,520	32,020	32,020	96,560

20. Funding requested from the Trust (continued)

When will the funding be required? At the earliest convenience
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? Yes. Through the development of a tailored funding strategy which includes the identification of alternative funders, funding diversification (factoring in corporate, individual and online fundraising mechanisms) and ensuring that our project's service delivery is oriented along key government strategies such as Together We Can End Violence Against Women and Girls.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? No planning or statutory consents are required

Declaration on behalf of applicant organisation

I, Stephanie Orel (your name)
am an authorised representative of
Latin American Women's Aid (your organisation)
within which I am the General Manager (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature 
Date 05/09/12

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

MEETING: 18/04/2013

ANNEX NUMBER: 6

ASSESSMENT CATEGORY - Improving Londoners' Mental Health

St Cuthbert's Centre

Ref: 11588

Amount requested: £46,500

Adv: Ciaran Rafferty

Base: Kensington & Chelsea

**Benefit: Ken & Chelsea;
Hammersmith & Fulham**

Purpose of grant request: Contribution to salary costs of Deputy Manager delivering mental health services to elderly and homeless beneficiaries in Earl's Court.

Background

St Cuthbert's Centre (SCC) in Earl's Court has been operating since the 1980s and became a registered charity in 1990. SCC is located within St Cuthbert's Church Hall but is a separate organisation from the adjoining Church (albeit they have a very close bond and working relationship). The Church hall is an interesting building in itself, being the first community centre in Kensington and the first building of its kind to have a stage area.

SCC the charity offers an open-door drop in centre providing support for the homeless and rough sleepers and all those who are marginalised and vulnerable in the surrounding areas. Many of the clientele have mental health issues. This part of London has seen many changes in its population profile over the years (Arabic is currently the No.2 language spoken) and has quite severe pockets of deprivation.

Funding History

None.

Current Application

As funding cuts have eroded the scope and capacity of local services demand has risen on those that remain, including SCC. For example, another centre for homeless people which previously operated as a drop-in 5 days per week now offers just 1 hour per day - and only for referrals (people can't just walk in). SCC, not traditionally being dependent on local government funding, has therefore managed to become less directly affected by cuts in that sector although the pressure to raise funds from other sources is no less acute.

SCC provides physical shelter and warmth 5 days per week and a range of support services including information and advice; counselling and training courses; access to a health worker; social events, computer literacy classes; and a cooked lunch. It doesn't just work with those who

are homeless – many clients are elderly people living alone and often in poverty and for whom the Centre provides social contact and support.

This application is for a contribution to the salary costs of the organisation's Deputy Manager as it is this post which will oversee most of the work supporting those clients with mental health needs (estimated to be 50% of the total number of people seen at the Centre). The focus will be on all ages including those aged over 60 who are not homeless but living alone and who are, as the organisation expertly describes "...on the cusp between independence and intervention".

Financial Observations

Audited accounts for the year ended 31st March 2012 show a surplus of £530 (0.5% of turnover).

The organisation's reserves policy states that it aims to hold 6 months' worth of its normal level of expenditure, which equates to £94,195 based on expenditure in the current year 2012/13. Unrestricted free reserves held at 31 March 2012 amounted to £51,559 representing 3.3 months' worth of expenditure.

The latest forecast for the current year to 31st March 2013 shows a surplus of £610. The budget for 2013/14 also indicates a surplus (of £16,747) based on total income of £180,000, of which £87,500 (49%) has yet to be secured from other funders.

Officer's Appraisal

SCC is fully knowledgeable of and committed to addressing the mental health needs of homeless and vulnerable people in this area. Its Chairman serves on the West London Mental Health Trust; its senior staff are trained in health and social care; and the Centre provides formal mental health assessments (through its new post of Mental Health Outreach Worker – funded by the CLSA Chairman's Trust). It is networked into other services and agencies so that those assisted can be moved where appropriate (and so that people can be referred to SCC in turn). This is an organisation rooted in, knowledgeable of, and fully committed to its community and which can be commended for its drive to help those who would otherwise be under the radar of statutory services but no less in need.

Recommendation

£46,500 over three years (£15,000; £15,500; £16,000) towards the salary and related costs of the Deputy Manager.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11588

Date Received:

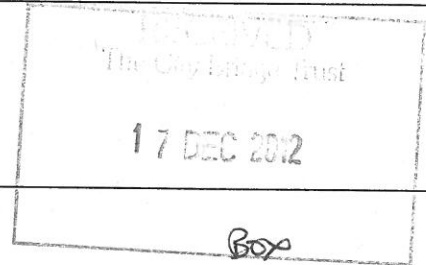
17/12/12

Programme
Area:

3

1. About your organisation

Name of organisation applying for grant: St Cuthbert's Centre	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence 51 Philbeach Gardens, Earl's Court, London	
Postcode: SW5 9EB Is this your home address? No	
Contact person: Mr Christopher Uncles	Position: Hon. Treasurer & Trustee
Phone: 0207 835 1389	Fax:
E-mail: dropin@stcuthbertscentre.org.uk	
Website: www.stcuthbertscentre.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 803638	
Year and month organisation established: 12/1990	



2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? Improving Londoners' mental health
Purpose for which funds are requested: (25 words maximum) Contribution to salary costs of Deputy Manager delivering mental health services to elderly and homeless beneficiaries in Earl's Court.
How much funding is requested? Year 1: £15,000 Year 2: £15,500 Year 3: £16,000 Total: £46,500

3. Aims of your organisation

The objects of the company are the relief of poverty, hardship, sickness and distress amongst persons in Greater London.

St Cuthbert's is part funded by RB Kensington & Chelsea to provide a 'mezzanine' level of care to people who have come to be wary or even fearful of the statutory interventions made by the Community Mental Health Teams and/or Social Workers.

Many face an acute dilemma between suffering alone with their condition or suffering their engagement with the psychiatric establishment. Without St Cuthbert's' intercession, they would become estranged from all service providers and quietly deteriorate on their own.

St Cuthbert's mission statement is 'proving the community cares.'

4. Main activities of your organisation

St Cuthbert's is the only drop-in centre in Earl's Court. It welcomes an average of 52 people a day (150+ per month and 600+ per annum). About two thirds are male, half are over sixty and a third use drugs/ alcohol. A quarter are homeless, a quarter have mental health diagnoses (inc. schizophrenia and dementia) and a tenth have a dual diagnosis.

St Cuthbert's offers them a sanctuary. It is open from 10.30am-3.30pm, five days a week. It provides free showers, laundry and a clothes bank; weekly health checks (visiting nurse); subsidised food (breakfast/lunch); free IT facilities and voicemail (esp. for those of no fixed abode); books, games and organised social activities (bingo and summer outings).

These provisions are made to welcome, settle and build trust, until the beneficiaries feel ready to open up and access the one-to-one advice, referrals, representation and counselling services provided by the Centre Manager, his Deputy and the Mental Health Outreach Worker. This is where the real work is done to prevent evictions, defuse social issues and mediate the beneficiaries' engagement with the statutory services.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	1	8	15

6. How do you support your volunteers?

There is a detailed Job description, Induction Pack and all Volunteers sign a code of conduct. They are taken through all the policies and guidelines and are supervised/supported by Senior Volunteer Coordinator, Centre Manager and his Deputy.

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?
Yes	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	86,129
Activities for generating funds	
Investment income	
Income from charitable activities	13,384
Other sources	15,085
Total Income	114,598

Expenditure:	£
Charitable activities	109,122
Governance costs	4,946
Cost of generating funds	
Other	
Total Expenditure	114,068
(Deficit)/surplus for the year:	530

Asset position at year end	£
Fixed assets	19,551
Investments	
Net current assets	51,559
Long-term liabilities	(55,000)
*Total A	16,110

Reserves at year end	£
Endowment funds	
Restricted funds	
Unrestricted funds	16,110
*Total B	16,110

* 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?
7%

10. Material changes

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

The trustees of St Cuthbert's Centre have appointed Mr Jonathan McCafferty as a new trustee.

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) Livery Companies			23,500
(ii) RB Kensington & Chelsea	6,000	6,000	6,000
(iii)			
(iv)			
(v)			
(vi)			

13. Previous grants received

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

	Year: 2010	Year: 2011
Leathersellers' Company CT		12,500
Evening Standard Dispossessed Fund		10,000
Winton Charitable Foundation		12,000
Hilden Charitable Fund		7,000
NatWest Community Force		6,275
Trusts £5,000 and under	11,350	21,650

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

Staff and volunteers are encouraged to use public transport whenever possible. The office and kitchen recycle all food packaging, paper and cardboard. Any excess food is given to beneficiaries so nothing is wasted.

St Cuthbert's Centre makes good use of second hand clothes, shoes, household goods and bedding that might otherwise go to landfill. In addition it receives surplus food from a number of local sources thus preventing surplus food from going to landfill, and thereby reducing its carbon footprint.

St Cuthbert's Centre recycles, reuses and extracts the maximum value from a broad range of products that would otherwise be thrown away by an aspirational and materialist society.

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.

St Cuthbert's began in 1987 with a vicar serving tea and sandwiches to the homeless. Since then it has grown into a sophisticated project filling a specific gap in the local welfare net. It specialises in looking after those who defy the statutory services' best efforts to count, account or care for them. In most cases, they have a long 'history' with the Community Mental Health Teams and/or Social Services and the fact that St Cuthbert's is not a statutory body is of paramount importance to them.

The beneficiaries live on the cusp between independence and intervention. The over 60's tend to be proudly independent but increasingly frail. The under 60's tend to have chronic mental diagnoses but they hide their symptoms and live in fear of discovery. Both groups develop elaborate coping mechanisms, which usually perpetuate their estrangement. Some are so acutely disempowered that they cling to the flimsiest of liberties and reject well meaning attempts to help. Their apparent intransigence causes hurt and confusion on both sides and as a result, misunderstandings with landlords or neighbours can be every bit as harmful as benefits mix-ups or medication issues.

St Cuthbert's deals with this care quandry by giving its beneficiaries as much autonomy as possible. It is a two step project, designed to give its beneficiaries full and unfettered access to all its services for as long as it takes to make them feel safe. No questions are asked in step one and it can take years for an isolated individual to finally take step two. About half of the beneficiaries do eventually engage with the one-to-one services but this decision is up to them and them alone. In this way St Cuthbert's gives its beneficiaries a small but genuine measure of autonomy and in so doing, it gives them back something that the statutory services tend to take away.

Objectives:

- To improve the physical wellbeing of homeless, transient and elderly beneficiaries by providing food, clothing, washing facilities and weekly visits by a nurse (target 400 p.a.)
- To improve the autonomy of homeless, transient and elderly beneficiaries by providing advice, referrals and representation (including accompaniment to meetings) for physical health, mental health, detox, housing, benefits and legal issues (target 300 p.a.)
- To improve the mental and psychological health of homeless, transient and elderly beneficiaries by providing informal counselling (Centre Manager & Deputy) and mental health assessments (Mental Health Outreach Worker) (target 150 p.a.)
- To reduce isolation, loneliness and depression among homeless, transient and elderly beneficiaries by providing companionship and organised leisure activities (target 400 p.a.)

All the senior St Cuthbert's staff are appropriately trained to work with extremely vulnerable people. The Centre Manager and his Deputy have NVQ Level 4 and Level 3 qualifications in Health & Social Care and both are trained as, respectively, 'person centred' and 'psychosynthetic' counsellors. The new Mental Health Outreach Worker has recently been appointed. She has a BSc in Psychology and is an Accredited Therapeutic Counsellor. Her job is to provide mental health assessments, to forestall catastrophic deteriorations, to develop a flexible, recovery focused approach for those with extremely complex needs (eg. chronic psychotic illnesses) and to build the outreach service.

St Cuthbert's has achieved Pqasso level 1. It has found its niche and developed a strategy over the 25 years it has been working for its beneficiaries. Some have been attending for decades. The loyalty of the RB Kensington & Chelsea in part-funding the project for 16 years is testament to its local importance but the work it does is difficult and often challenging for the staff. They need exceptional social skills and a detailed knowledge of the relevant regulations and services on offer.

St Cuthbert's Centre's improves the mental health of Londoners by both: a) Tackling depression amongst older people and; b) supporting homeless people, transient people and rough sleepers.

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

We will record the number of beneficiaries: having meals, showers or clothing; accessing the one-to-one advice, referrals and informal counselling; receiving mental health assessments; accessing mainstream services; helped to sustain their current accommodation/assisted into temporary and permanent housing; accessing the internet and compiling a CV; meetings with other relevant services.

Individual care plans will be used in collaboration with other agencies involved. The Centre Manager/Deputy & Mental Health Outreach Worker will record detailed information following each one-to-one meeting with a client. We are reluctant to ask clients to fill in detailed questionnaires as this service is not intended to be intrusive, particularly in view of the delicate nature of this client group. We have implemented our own relatively simple questionnaire to help measure our progress towards the outcomes.

We will record any informal feedback received from clients, other members of staff, and any other support agencies involved with them. We will monitor the number of beneficiaries reporting an improved sense of well-being, and reduced sense of isolation, through one-to-one feedback (including Evaluation Forms), annual user surveys and focus groups.

17. Beneficiaries

How many people will benefit from the grant per year? **400**

In which local authority is your organisation based?
RB Kensington & Chelsea

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
RB Kensington & Chelsea 85%, Hammersmith & Fulham 15%

At what address will the activity be located? **51 Philbeach Gardens, London SW5 9EB**

What age group will benefit? **18-80+**

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

	%		%
White - British	70	Black - Caribbean	2
White - Irish	3	Black - African	3
White - Other (please describe) Eastern European	15	Black - Other (please describe)	
Asian - Indian	2	Black - British	3
Asian - Pakistani		Chinese	2
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	

Open to everyone **Yes**

What proportion of the beneficiaries will be disabled people?
10%

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Centre Manager	30,000	30,900	31,827	92,727
Deputy Manager	24,750	25,493	26,257	76,500
Mental Health Outreach Worker	26,000	26,780	27,583	80,363
Service Co-ordinator	24,000	24,720	25,462	74,182
Cook	14,000	14,420	14,853	43,273
Kitchen Helper	1,800	1,854	1,010	4,664
Employer's NIC	10,392	10,704	11,025	32,121
Office Costs	4,200	4,326	4,456	12,982
Utilities & Cleaning	7,700	7,931	8,169	23,800
Independent Examiner's Fees & Prof Costs	7,089	7,302	7,520	21,911
Food & Drink	3,228	3,325	3,425	9,978
Repairs, Insurance & Depreciation	9,100	9,373	9,654	28,127
Training, Consultancy & Travel	394	406	418	1,218
Bank Charges & Interest	600	618	637	1,855
TOTAL	163,253	168,152	172,296	503,701

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Leathersellers' Company	12,500	12,500		25,000
Martin Family Charitable Trust	15,000			15,000
CLSA Chairman's Trust	29,569	30,000		59,569
Antic. Catering/Hall Lets, RBK&C, WLCHC	44,750	39,750	39,750	124,250
TOTAL	101,819	82,250	39,750	223,819

What other funders are currently considering the proposal?

Henry Smith £90,000 (core), Lloyds TSB £30,000, Gosling £15,000, Hobson £10,000, Anton Jurgens £10,000, French Huguenot £10,000, Trusthouse £9,999, AB £7,500, Mrs Smith & Mount £15,000, Woodlands £15,000, Steel CT £5,000 and Stanley Smith £5,000.

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 £
55% Deputy Manager's basic salary & NIC	15,000	15,500	16,000	46,500
TOTAL	15,000	15,500	16,000	46,500

20. Funding requested from the Trust (continued)

When will the funding be required? **1st April 2013**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **St Cuthbert's Centre will continue to apply to grant-giving trusts and charitable foundations on an ongoing basis as part of its fundraising strategy. It will also apply for 3-5 year funding wherever possible.**

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, **Christopher Uncles** (your name)

am an authorised representative of

St Cuthbert's Centre (your organisation)

within which I am **Hon Treasurer & Trustee** (your position)

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

Signature



Date **5th December 2012**

Return the completed form to: The City Bridge Trust

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

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

MEETING: 18/04/2013

ANNEX NUMBER: 7

ASSESSMENT CATEGORY - London's Environment

Federation of London Youth Clubs (London Youth)

Amount requested: £57,786

Ref: 11596

Adv: Ciaran Rafferty

Base: Hackney

Benefit: London-wide

Purpose of grant request: To enhance young Londoners' knowledge and appreciation of the natural environment and to inspire them to become environmental advocates throughout London.

Background

London Youth is both the common and operational name for the Federation of London Youth Clubs – the umbrella body and key support agency for more than 400 community organisations working with over 75,000 of London's young people. Its Patron – and a very active one – is HRH The Duke of Edinburgh. He has been Patron since 1946, in fact since before he was married! The present day organisation results from the merger in 1999 of the London Union of Youth Clubs and the London Federation of Boys' Clubs.

London Youth's aim is to help young people be the best they can be and they do this by focusing on three key factors: development, opportunity and voice. Its programmes and activities are delivered to and through its member organisations and cover: youth action and youth leadership, sports development, employability, the London Youth Quality Mark (to develop and maintain good practice), and environmental work. It also runs two residential centres – Woodrow High House and Hindleap Warren – which offer unique opportunities for young Londoners to experience life outside the city.

Funding History

As you might expect the Trust has a long and regular history of supporting this key infrastructure body (and its original component bodies). In the past ten years the following grants have been made: November 2004 (£144,000) and then February 2007 (£75,000) to support volunteering across London; October 2009 (£135,000) towards the cost of training volunteer youth workers; and finally, in March 2010 (£100,000) for two years' support of a project helping and encouraging young people to develop and manage environmental initiatives. All grants have been satisfactorily monitored to date.

Current Application

This application is for a third year's support of the environmental project referred to above and which the organisation calls *Urban Nature*. The current grant is due to end in April 2013 but such has been the success of

this initiative – and the demand for it - that the organisation wishes it to continue for another year. Members will be pleased to note that this project won the 2012 Sustainable City Award in the Greening the Third Sector category.

Urban Nature works with a cohort of member organisations to educate, inspire and support young people on the natural environment and on what they can do to protect it. The programme commences with a residential at Hindleap Warren after which, armed with new learning and skills, the young pioneers return to their communities and engage their peers in improving the sustainability, biodiversity and/or greening of their local organisation or neighbourhood. Monitoring of the work to date has shown that, contrary to initial assumptions, the young pioneers do not just “go away” at the culmination of their projects but that they want to continue and to do more, constantly pushing boundaries and being ever more demanding – which is a good thing!

In the third year, should you agree funding, the project will be further developed so that continuing support can be given to some of the existing schemes (as well as the development of new projects) and also to incorporate opportunities for some of the young pioneers to access accredited training in this field (London Youth is currently negotiating this with a training provider).

Financial Observations

The audited accounts for the year ended 31st August 2012 show an overall deficit of £51,194 (1.2% of turnover). This comprised a deficit on unrestricted activity of £131,088, partially offset by a surplus on restricted funds of £28,617 and a surplus on endowment funds of £51,277.

The charity’s reserves policy does not give a target figure but states that “Trustees seek to retain a prudent level of reserves free from unrestricted income.” The policy notes that as at the 31st August 2012, reserves stood at £723,787. This sum represented the charity’s holding of unrestricted free reserves and at that time was equivalent to 2 months’ worth of total expenditure. The policy states “Trustees believe unrestricted reserves stand at a satisfactory level in light of the adopted policy but will aim to increase unrestricted reserves where possible to improve the ratio to annual planned expenditure”.

For the current year to 31st August 2013, a forecast provided on 26th March shows a deficit of £26,100 (0.5% of turnover). This deficit will be met from unrestricted funds, which will reduce free reserves to approximately £698,000 – equivalent to 1.6 months’ worth of total expenditure.

Officer's Appraisal

Urban Nature has been a very successful project to date and has clearly helped many young people to become instigators of positive environmental change in their communities. London Youth is an exceptionally valuable organisation, helping hundreds of organisations to constantly improve the level and quality of opportunities to young Londoners. A third year's support of this initiative will see a logical and welcome development of the work to encompass access to accredited training for the participants.

Recommendation

£55,000 for a third and final year's support of the Urban Nature initiative, subject to receipt of a satisfactory final report on the previous grant. The grant will provide for the salary costs of a f/t Project Co-ordinator plus associated support and delivery 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)

11596

Date Received:

20/12/2012

Programme
Area:

04

1. About your organisation

Name of organisation applying for grant: The Federation of London Youth Clubs (London Youth)	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence: 47-49 Pitfield Street London	
Postcode: N1 6DA	
Is this your home address? No	
Contact person: Mr Marlon Gibbins	Position: Environmental Action Officer
Phone: 020 7549 8817	Fax: 020 7549 8801
E-mail: marlon.gibbins@londonyouth.org.uk	
Website: www.londonyouth.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 303324	
Date organisation established: 20/11/1962	

2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? London's Environment
Purpose for which funds are requested: (25 words maximum) To enhance young Londoners' knowledge and appreciation of the natural environment and to inspire them to become environmental advocates throughout London.
How much funding is requested? Year 1: £0 Year 2: £0 Year 3: £57,786 Total: £57,786

3. Aims of your organisation

London Youth is a vibrant network of more than 400 community organisations serving 75,000 young people and their families across the capital.

Our vision is unashamedly bold: it is of a great world city in which every young person, whatever their background, is valued and challenged to become the best they can be. Our mission is simple: to improve services and opportunities for young people.

We want everyone growing up in and around London to enjoy access to high quality youth work - someone to talk to, information and guidance and life-enriching activities - all within a safe, stimulating and supportive environment. We work with young people in all their brilliant diversity, placing a particular emphasis on those who might be in any way disadvantaged or at risk of being excluded.

4. Main activities of your organisation

We work to support 75,000 young people in every London borough, placing a particular emphasis on those that are disadvantaged or at risk.

We help community-based youth clubs and youth workers increase their effectiveness - supporting them with information, accredited training and face-to-face guidance.

We work directly with young people to create opportunities that a single member organisation could not - for example our tried and tested Youth Action model brings young people together from all backgrounds to design, lead and learn from their own initiatives, accentuating the positive impact they can have on their communities. And at our two outstanding residential centres in the Chilterns and the Ashdown Forest we give young Londoners a unique experience of the benefits of the natural environment.

We advocate on behalf of our members so that the daily experience of on-the-ground practitioners informs the thinking of policy makers and funders.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
70	25	13	960

6. How do you support your volunteers?

London Youth has a strong tradition of creating rewarding volunteer opportunities within our organisation and within our membership network.

Our Volunteer Coordinator is responsible for creating sustainable accredited volunteer roles, for both individuals and corporate organisations, and supporting them through their volunteering journey with us.

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	N/A

8. Finance

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

Financial year ended:-

Month: 31 August

Year: 2012

Income received from:	£
Voluntary income	857,431
Activities for generating funds	38,269
Investment income	48,488
Income from charitable activities	3,301,052
Other sources	0
Total Incoming Resources	4,245,240

Expenditure:	£
Charitable activities	4,212,036
Governance costs	15,132
Cost of generating funds	120,543
Other	0
Total Resources Expended	4,347,711
Net (Deficit)/Surplus:	(102,471)
Other Recognised Gains/(Losses)	51,277
Net Movement in Funds	(51,194)

Asset position at year end	£
Fixed assets	7,623,857
Investments	1,054,114
Net current assets/(liabilities)	1,025,405
Long-term liabilities	0
*Total A	9,703,376

Reserves at year end	£
Unrestricted funds	8,347,644
Restricted funds	314,106
Endowment funds	1,041,626
*Total B	9,703,376

9. Statutory funding

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

10. Material changes

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

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:				
Month/Year:	03/10	Ref:	0	Grant received: £100,000 OR application rejected? No
Month/Year:	05/09	Ref:	0	Grant received: £135,000 OR application rejected? No
Month/Year:	02/07	Ref:	0	Grant received: £20,300 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)			
(ii)	LB Enfield LB Greenwich LB Barking & Dagenham		10,000 3,735 10,000
(iii)			
(iv)			
(v)	Dept Education Dept Work & Pensions	832,915 296,556	312,820 491,283 1,700 1,950
(vi)	GLA LDA	315,337	30,000 180,737

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
John Paul Getty Charitable Trust	50,000	50,000
Big Lottery Fund		164,188
The Girdlers' Company	40,000	40,000
Jimmy Dixon Trust	30,000	30,000
John Ellerman Trust	25,000	25,000
Walcott Foundation	60,000	30,000

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

Through a combination of the young people's projects and initiatives at the centres there has been a noticeable reduction in their carbon footprint. Urban Nature has also influenced our Quality Mark framework. Member clubs are now required to carry-out an environmental audit of their centre, as well as developing a robust environmental policy.

We have renewed the roof at our London office, increasing the insulation and reducing heat loss, and have upgraded our central heating boiler to a new condensing boiler.

Our two outdoor education centres are continuing to place a strong emphasis on sustainability. Hindleap Warren, as part of their carbon off-setting scheme, have recently installed solar panels and TRV's, and are conducting a feasibility study for a biomass boiler. Woodrow High House, through the on-going capital appeal, has undertaken carbon emission reduction measures and is planning modifications to the existing energy installations.

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.

Following the past 18 months of working collectively with young people and youth workers on developing their own environmental initiatives, it has become clear that there is a need and desire for this type of positive opportunity. During its first year, many of the Urban Nature projects developed exceeded our expectations and became an integral part of the provisions being offered at the participating youth organisations.

The resulting impact demonstrated that both the young people and youth workers had acquired sufficient knowledge and confidence to independently take forward their projects, but at the same time identified that there were individual needs that would further support their learning and development.

Through direct consultations with a cross-section of young people and youth workers there was a general consensus that those who had taken on the leadership roles within their projects would benefit greatly from further training opportunities, enabling them to both scale-up and replicate what they had achieved, to become advocates not only in their youth centres, but in the wider community.

For the third year we propose to continue to build upon the successes of our Urban Nature programme by giving 120 more young people from three additional youth organisations the opportunity to participate in our established programme, by getting them to design, lead and then evaluate their own environmental projects. Alongside this we will re-visit eight projects from the previous two years where we will facilitate a more intensive training programme for 24 young people that will support them in developing their environmental knowledge and confidence.

To further the overall impact of our learning, each individual group will contribute towards the production of an environmental resource, either in the form of a booklet or documentary, that will be distributed to other youth groups and schools across London, with the aim of reaching a further 480 young people.

In partnership with Capel Manor College, our aim is to develop an accredited introductory level environmental training programme that would both recognise the progress of the young people and offer them a variety of challenges, and ultimately provide them with a platform from which they could progress onto further qualifications in environmental studies.

Our main objectives for the programme in Year 3 are:

1) To improve young Londoners' quality of life by inspiring them about nature, enabling them to understand, appreciate and experience the natural environment.

We have a strong track record of educating young people about the natural environment and helping them understand that the lessons they learn about nature are relevant to their everyday lives. This project will build on our successes in this area and enable young Londoners to experience the many benefits of engaging with and contributing to the quality of their environment.

2) To contribute to the sustainable improvement of London's open spaces by reducing the carbon footprint of London's youth organisations and by raising awareness about the impact of the carbon footprint among young Londoners.

We plan for the environmental benefits of this project to be cascaded from direct participants (individuals and organisations) to hundreds of others and to be sustained well beyond the period of funding.

3) Young people are better equipped to become environmental leaders within their youth club and community.

London Youth has an established track record of delivering training and developing leadership skills among young people. By enhancing the learning experience and building upon what the young people have already learnt we are confident that this will provide a long lasting legacy.

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

London Youth has a thorough yet uncomplicated approach to monitoring and evaluation. Alongside the experiences from the first year of Urban Nature we have developed an effective, yet simple, impact assessment framework which has been fine-tuned to capture the richness and variety of projects initiated by the young people.

We will be measuring progress throughout the year against 16 environmental indicators and 9 personal indicators.

We are constantly extracting key statistics, stories and evidence, and adapting the material to interest and influence different audiences. The projects that were developed during the first year of Urban Nature have since captured the imagination of other groups interested in participating.

We pass on our message to the generic youth press and policy forums in order to ensure our lessons are shared as widely and inclusively as possible.

We are always keen to learn from and share what does and doesn't work.

17. Beneficiaries

How many people will benefit from the grant per year?

624

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)

The project will be delivered in 11 of our member clubs across London, with 3 new clubs participating and an educational resource pan-London.

At what address will the activity be located?

The programme will be delivered at Hindleap Warren, our Hackney office and the sites where the member organisations are based.

What age group will benefit? **Over 11 years, over 16 years**

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

	%		%
White - British	35	Black - Caribbean	8
White - Irish	2	Black - African	11
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	2	Black - British	14
Asian - Pakistani	2	Chinese	
Asian - Bangladeshi	10		
Asian - Other (please describe)		Other (please describe)	
		Mixed background	16
			Open to everyone

What proportion of the beneficiaries will be disabled people?

10%

18. Funding required for the project

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

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project Coordinator salary			31,581	31,581
Management support			7,105	7,105
Support costs (IT, Finance, HR, Comms)			6,500	6,500
Residential costs			4,000	4,000
Accreditation			1,500	1,500
Project costs			1,800	1,800
Project marketing and materials			3,200	3,200
Staff travel			1,000	1,000
Volunteer and Young people's travel			600	600
Staff training			500	500
TOTAL			57,786	57,786

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

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

What other funders are currently considering the proposal?

Funder	£
TOTAL	

19. Funding requested from the Trust

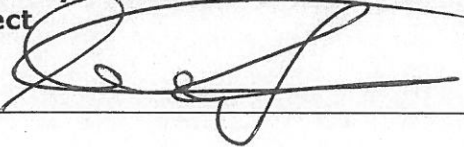
How much is requested from the Trust? (List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Project Coordinator salary			31,581	31,581
Management support			7,105	7,105
Support costs (IT, Finance, HR, Comms)			6,500	6,500
Residential costs			4,000	4,000
Accreditation			1,500	1,500
Project costs			1,800	1,800
Project marketing and materials			3,200	3,200
Staff travel			1,000	1,000
Volunteer and Young people's travel			600	600
Staff training			500	500
TOTAL			57,786	57,786

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">01/04/2013</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? London Youth has developed strong partnerships with a number of corporate organisations as part of the Urban Nature programme as well as making links with the Big Lottery Fund. Our fundraising contingency is based on utilising the skills of our experienced fundraising team to secure income from other sources to continue the development of the programme.
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>Rosie Ferguson</u> (your name)
am an authorised representative of <u>London Youth</u> (your organisation)
within which I am <u>Chief Executive</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>3/1/13</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
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- **do use the correct postage** - the completed form and additional materials are likely to exceed 100g in weight

MEETING: 18/04/2013

ANNEX NUMBER: 8

ASSESSMENT CATEGORY - Older Londoners

Age UK Enfield

Ref: 11589

Amount requested: £97,586

Adv: Joan Millbank

Base: Enfield

Benefit: Enfield

Purpose of grant request: To sustain our proven community-based Active Life Centre and Outreach service.

Background

Age UK Enfield (AUE) is a local charity working to promote the independence and wellbeing of older people and their carers living in Enfield. Enfield is the fifth largest London borough and has a very high proportion of pension credit recipients. AUE is the lead provider of older people's services in the borough. Activities include an information and advice service, dementia support, Home from Hospital service, foot care clinics, day care activities, intergenerational projects and a trading service in over-50's products. AUE participates on a number of strategic fora and partnerships to inform policy development at a local, regional and national level. It is affiliated to the Age UK federation.

Funding History

In 2007 you awarded a three year grant of £112,500 to provide a fit-for-life programme for older people in Enfield. The final monitoring report was deemed as 'good'.

Current Application

A three year grant is sought to help AUE sustain its outreach service that currently operates through four Active Life Centres and a home befriending service. Running costs towards the Freezywater Active Life Centre are also being sought.

The part-time Manager (20 hours per week) is responsible for planning and delivering the outreach services. The provision includes a one day per week day support service run from each of four local community centres. Activities include age-appropriate exercise, games, conversation, and speakers on health and wellbeing issues. Other AUE services are also available including benefits advice and nail clipping service. Two centres provide a freshly cooked affordable hot meal. Trained volunteers – mostly active older people – provide essential practical and informal befriending support within each club setting. Freezywater is located in one of the most deprived parts of Enfield (as identified in Enfield Older People's Profile 2012) and attracts 70 regular users each Friday between 10.30am and 2.30pm. Running costs sought include room-hire charges, volunteer expenses and contribution to core organisational costs. The Befriending

Service provides home visits to the most vulnerable and isolated older people, plus a telephone contact service.

Older people benefiting from these services are aged over 50 years, with 80% aged 75 years plus and living alone. For many users, the day at the Active Life Centre is their only time away from home. Older people can self-refer or are referred by agencies because they are isolated, vulnerable and/or suffer some form of mental ill-health. Over 40% are drawn from Enfield's diverse range of BAME communities. User surveys demonstrate a high level of satisfaction with the services provided. Benefits include feeling less lonely and less isolated, improved health and wellbeing, improved access to other services available in the borough.

Financial Observations

The audited accounts for the year ended 31st March 2012 show income of £1,256,469 and an end-of-year surplus of £143,719 (11.4% turnover). The reserve policy does not state a target level of free unrestricted reserves which should be held but notes that the charity has a current holding of £511,088 (equivalent to 5.5 months' worth of total expenditure) which the Trustees consider to be insufficient and that they are looking at ways of increasing free reserves. A target reserve for inclusion in the reserves policy is also under discussion by the trustees.

Projected income for the year to 31st March 2013 is on course with all grants and contracts secured; a surplus of £24,000 is expected, of which approximately 50% should be free unrestricted funds.

The 2013-14 budget shows estimated income of 1,141,261 and expenditure of £1,095,845, resulting in an end of year surplus of £45,416, of which £28,600 relates to free unrestricted funds. The introduction of Personal Budgets is anticipated to produce income of £208,297 (18% of budget income), whilst £320,603 (28% of budget income) is expected from London Borough of Enfield which is a fall of £173,107 (35%) compared to the grant received in the prior year of £493,710. Other grant income secured to date amounts to £168,230 (15% of budget income). Income from other user fees and donations is expected to increase by £47,836 (12%) to £437,379 (38% of budget income).

Officer's Appraisal

Active Life Centres offer a lifeline to isolated and vulnerable older Enfield residents. Trained volunteers help AUE to provide this unique borough service in a user-friendly and cost effective way. The Befriending Service complements the outreach service to provide holistic support. The combined service is at risk because of severe financial restraints on health and local authorities, and because local GP commissioning for older people's services is not fully in place in the borough. A three year grant

would secure the outreach service and the activities offered at Freezywater. 250 isolated and vulnerable older people would benefit.

Recommendation

£97,500 over three years (£32,000; £32,500; £33,000) towards the salary cost of the part time (20 hpw) Outreach Service Manager and towards the running costs at the Freezywater Active Life Centre.



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)

11589

Date Received:

17/12/12

Programme
Area:

5

1. About your organisation

Name of organisation applying for grant: Age UK Enfield	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence Unit 2, Vincent House, 2E Nags Head Rd, Ponders End, Enfield, London	
Postcode: EN3 7FN Is this your home address? No	
Contact person: Ms Lisa Seagroatt	Position: Community Services Director
Phone: 020 8375 4120	Fax: 020 8375 4138
E-mail: lisa.seagroatt@ageukenfield.org.uk	
Website: www.ageuk.org.uk/enfield	
Legal status of organisation: Charity	
If registered, please give charity number: 1063696	
Year and month organisation established: 1985, April	

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) To sustain our proven community-based Active Life Centre service, its management, extensive volunteering, and links to wider opportunities for isolated older people in Enfield borough
How much funding is requested? Year 1: £31,887 Year 2: £32,525 Year 3: £33,174 Total: £97,586

3. Aims of your organisation

Age UK Enfield is an independent local charity and Age UK brand partner. Our mission is to work with the diverse community of older people and their carers living in the Borough of Enfield to promote their independence, wellbeing and quality of life. We aim to: enable older people to make positive lifestyle choices, and to remain healthy, active and independent; provide opportunities that make a difference to older people's lives; develop programmes that enable older people to volunteer; and, link with local government initiatives and national policies. We engage over 200 volunteers p.a., supporting some of the Borough's most marginalised, disadvantaged and vulnerable (including over 40% BME). We have a substantial track record of effective service delivery, developed in response to expressed and identified needs, and of working in partnership with others.

4. Main activities of your organisation

Age UK Enfield is the main focus within the London Borough of Enfield in relation to service delivery, strategic engagement and community participation by and for older people. Services are provided across the borough, although with a particular focus on one or more deprived easterly wards within which Age UK Enfield is based. Activities include: Fit for Life keep fit sessions; Information & Advice service; dementia services including daycare and respite; Home from Hospital support; Footcare clinics; Active Life Centres drop-in; Befriending; Intergenerational projects; and trading in over 50s products. Services usually operate daily, and at least weekly. Age UK Enfield has an impressive array of sustained engagements in strategic forums and local delivery partnerships and networks, and regularly informs strategy and policy development locally, regionally and nationally.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
10	60	11	240

6. How do you support your volunteers?

We have comprehensive volunteer policies and procedures, and an associated Volunteers Handbook. We have been awarded the Investors in Volunteers Standard showing commitment to best practice in supporting volunteers, including ongoing development.

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	45 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	122,584
Activities for generating funds	37,358
Investment income	1,471
Income from charitable activities	1,095,056
Other sources	0
Total Income	1,256,469

Expenditure:	£
Charitable activities	1,100,833
Governance costs	11,917
Cost of generating funds	0
Other	0
Total Expenditure	1,112,750
(Deficit)/surplus for the year:	143,719

Asset position at year end	£
Fixed assets	9,572
Investments	0
Net current assets	537,697
Long-term liabilities	0
*Total A	547,269

Reserves at year end	£
Endowment funds	0
Restricted funds	26,609
Unrestricted funds	520,660
*Total B	547,269

* 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?
55%

10. Material changes

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

No changes

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	/ 2008	Ref: 8061	Grant received: £112,500	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) City of London	0	0	0
(ii) LB Enfield	546,362	601,844	541,289
(iii) London Councils	11,955	11,955	4,467
(iv) Health authorities	148,750	148,749	149,749
(v) Government Depts	0	0	0
(vi) Other statutory	28,058	30,758	29,354

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
Big Lottery	81,112	20,431
Community Development Foundation	0	7,809
EON	0	0
Age UK	11,158	80,752
NB Years above are start of finance		
yr ie 2011 = 11/12		

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

Age UK Enfield applies ISO 19011 Quality and Environmental Management Systems Auditing across all of its services, activities and Centres. All managers have received training in this regard within the current year. Consideration of our environmental impact is a central value within the day-to-day management of the organisation. Recycling is implemented and encouraged at each of the venues from which we deliver services. Managers, working with staff and volunteers ensure consideration and review of resource use and that there is no unnecessary wastage, for example in our management of food at the Active Life Centres. Facilities audits take into consideration heating and lighting costs and managers responsible for each building are required to implement measures which lead to energy savings. Environmental issues are also discussed with clients who raise for example anxieties about their recycling collections, and in relation to which we have organised presentations from external speakers.

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: Enfield is the 5th largest London borough. It has the 46th highest proportion of pension credit recipients of all local authority areas in England. The proportion aged 55+ who participate in 3 x 30 minutes physical activity is 10.9%, compared to an England average of 13.3%. Projections of those 65+ living alone in is 37%. Freezywater Active Life Centre is located on the boundary between its Turkey Street and Enfield Lock wards. These wards fall within the 20% most deprived nationally. Life expectancies for men and women are lower than Enfield averages. The wards sit at Enfield's furthest north east which "is home to some of London's poorest communities suffering from high unemployment, low skill base, low educational attainment and a higher than average level of benefit claimants and income deprivation which has a disproportionate affect on children and older people" (North East Enfield Area Action Plan 2012).

Delivery: The current bid is to secure our p-t Outreach Services Manager post (20 hrs) and to sustain the committed input of many enthusiastic volunteers, and also the running costs of our Freezywater Active Life Centre - which takes place in an accessible Parish Hall and is the most popular of the Centres - and also to secure our extensive partnership links with opportunities for local older people, including referral pathways. The Manager will seek to additionally secure one further Centre at least, and with volunteers' support to expand our Befriending and wider peer outreach activities to the most vulnerable and isolated. Activities at Freezywater take place weekly.

Aim & Objectives: The aim of our Centres is to improve the life quality of isolated older people in Enfield borough through connecting them with their local community and wider opportunities. Our objectives are to: reduce isolation, loneliness and depression; keep older people healthy & safe; facilitate wellbeing; a sense of belonging; raise levels of esteem; provide a network of people and relationships; a choice of activities and opportunities to meet other people; provide info about safety, public health, financial benefits and energy saving; relevant information and signposting to local services; weekly Active Life Centres in four locations in the borough; alert services to crises; signpost or arrange Dial-a-ride transportation if required; culturally sensitive and promote equal opportunities to all; a choice of fun, healthy or appropriate activities that facilitate social interaction and integration; guest speakers; facilitate attendees in selecting future activities appropriate to the group; freshly prepared nutritious meals from fresh ingredients at two Centres; volunteers support newcomers to feel welcomed and enable participation; arrange day trips and outings

Targets: 30 volunteers (up from 25) actively engaged at any one time, comprising 35 per annum. 80 clients weekly will attend Freezywater Active Life Centre (an increase on the current 70). In total, the bid will support 250 individuals p.a. (not including beneficiaries of Befriending). By providing the core around which will be seek to sustain additional Centres and expand Befriending, beneficiaries are likely to be many more.

The Right Organisation: Working with and for Enfield's older people for 27 years. Commitment is evidenced by our 240 volunteers. Our extensive partnerships and links and wider service provision also ensure that we are best placed to add value for local older people and wider stakeholders. Age UK Enfield has met several quality assurance standards (as listed in the Fuller Proposal).

Meeting the Theme: Over 80% of those accessing Centres are aged 75+. They weekly participate in social, cultural activities, and activities encouraging healthy lifestyles. Our large team of volunteers organises activities. Activities are targeted at areas of greatest disadvantage. Services and activities are devised with due consideration for those with dementia. Our Centres have been demonstrated to contribute effectively to the wellbeing of services through the range of activities provided.

Good Practice: Older people are present throughout Age UK Enfield, including comprising a majority of its Board and the majority of its volunteers. Many volunteers at the Centres over retirement age remain fit and healthy as a result of their participation. Volunteers jointly plan sessions alongside service users and the project managers on an ongoing basis. We have a very proactive approach to equalities and diversity. The projected proportion of those aged 50+ who are also BME was 23% in 2011. The organisation's beneficiaries are over 40% BME. A high proportion of service users have a disability and our sites are fully accessible. See response to Q14 regarding our Carbon Footprint.

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

The Outreach Services Manager will be responsible for collecting monitoring data, including ensuring volunteers are capturing activity and outcome measures. Age UK Enfield has recently adopted CharityLog as its Database and Contact Management System. CharityLog is fully web-based, with users able to access it (with appropriate log-in) from wherever they are accessing the internet, ideal for a project with as many different locations as our Outreach Services. Its functions include Outcome monitoring and reporting. The Outreach Services Manager will ensure that relevant staff and volunteers are trained in CharityLog's use.

Indicators will be incorporated into project and individual work plans. Volunteers will be trained in the use and analysis of evaluation tools in relation to outcomes. They will be made aware of City Bridge Trust's Working With Londoners: Older People's Programme outcomes alongside our own - as provided in the current application. Two evaluation groups will also be held annually (one for volunteers, one for clients) to focus attention and review further progress in relation to aims and outcomes, and to refine delivery.

17. Beneficiaries

How many people will benefit from the grant per year? **250**

In which local authority is your organisation based?

Enfield

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

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

Enfield

At what address will the activity be located? **St George's Parish Hall, 710 Hertford Road, Freezywater, EN3 6NR**

What age group will benefit? **In line with current activities, beneficiaries will be overwhelmingly (over 80%) aged 75 and over**

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

	%		%
White - British	44	Black - Caribbean	12
White - Irish	6	Black - African	8
White - Other (please describe) Greek/Greek Cypriot	4	Black - Other (please describe)	
Asian - Indian	4	Black - British	12
Asian - Pakistani	1	Chinese	1
Asian - Bangladeshi	2		
Asian - Other (please describe)		Other (please describe) Turkish/Turkish Cypriot	6
Open to everyone			

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 £
Outreach Services Manager (inc.NI,pensn)	22,546	22,996	23,456	68,998
Premises hire	7,828	7,985	8,144	23,957
Volunteer Expenses	5,069	5,170	5,273	15,512
Training	800	816	832	2,448
Postage	325	332	338	995
Printing & Publicity	620	632	645	1,897
Telephone	800	816	832	2,448
Insurances	1,199	1,223	1,247	3,669
Day Trip Transport	1,500	1,530	1,561	4,591
Contribution to core incl office costs	6,103	6,264	6,431	18,798
TOTAL	46,790	47,764	48,759	143,313

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Henry Smith Charity (awaiting decision)	14,902	15,239	15,585	45,726
TOTAL	14,902	15,239	15,585	45,726

What other funders are currently considering the proposal?

Henry Smith Charity are considering the matching (although not overlapping) bid in relation to our Befriending Project, also managed by the Outreach Services Manager and included above. This would fund the remaining 7 hours per week of the Manager's time.

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 £
Outreach Services Manager (inc.NI,pensn)	17,231	17,576	17,927	52,734
Premises hire	7,828	7,985	8,144	23,957
Insurances	99	101	103	303
Telephone	600	612	624	1,836
Postage	325	332	338	995
Printing & Publicity	320	326	333	979
Volunteer Expenses	1,325	1,351	1,378	4,054
Contribution to Core in. Office Costs	4,159	4,242	4,327	12,728
TOTAL	31,887	32,525	33,174	97,586

20. Funding requested from the Trust (continued)

When will the funding be required? **April 2013**

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

If so, how will it be resourced? **AUKE has ongoing strategic planning processes and places much emphasis on sustainability and diversifying the funding base. Full integration within strategic and senior management planning will be ensured. We have built much support amongst our partners and it is hoped that once local funding opportunities improve, we will be able to translate local commitment, goodwill and support into financial support.**

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

Declaration on behalf of applicant organisation

I, **Lisa Seagroatt** (your name)

am an authorised representative of

Age UK Enfield (your organisation)

within which I am **Community Services Director** (your position)

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

Signature



Date **5/12/12**

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

Hestia Housing & Support

Ref: 11389

Amount requested: £50,000

Adv: Tim Wilson

Base: Southwark

Benefit: Ealing

Purpose of grant request: Towards the costs of GP:Reconnect, a project improving the health and well-being of older Londoners and tackling isolation.

Background

Established in 1970 to support rough sleepers, today Hestia works across 20 London boroughs with over 2,000 people each year. The overall aim of the charity is to improve the quality of life of isolated and vulnerable Londoners, and it does this through a range of projects including: supported housing for women fleeing domestic violence; services for people with mental health issues; work with ex-offenders; and support for older people.

Hestia's services are delivered in collaboration with other health and social care agencies. The charity places a strong emphasis on volunteer involvement as well as peer-to-peer support in its project work.

Funding History

Hestia withdrew an application in September 2007, and submitted a revised proposal in time for approval at that month's Committee meeting. The charity received a 12-month grant for a project working with children affected by domestic violence. Subsequent monitoring was good, and the file was made historic some time ago.

Current Application

Hestia is part of a network of voluntary and statutory organisations working in Ealing that have a common interest in improved health and social care services. In 2011 this group examined the scale of need amongst older people in the borough, identifying that 60% lived alone, and that befriending services were stretched. For many of these older people, the GP surgery is the first place they turn for help and support, and it is with the support of local GPs that Hestia has developed a project designed to tackle social isolation amongst some of Ealing's most vulnerable older people.

Hestia seeks funding towards the cost of a new project called GP:ReConnect. The charity will engage a network of volunteers aged 60 plus, known as Community Navigators, who will then be linked to local GP

surgeries. With the assistance of these surgeries, volunteers will be matched with socially isolated older people. In addition to befriending support, Community Navigators will help their peers to access local services and take part in activities which offer them opportunities to make new contacts. Through tackling social isolation, the charity aims to improve the mental and physical wellbeing of 80 isolated older people in deprived parts of Ealing.

The charity has a strong track record of working with groups of volunteers, having run a befriending service for Tower Hamlets NHS and a project where older people mentor young women and children who have experienced domestic violence.

Financial Observations

Accounts for the year ended 31st March 2012 show a surplus of £727,505 (4.8% of turnover), of which £483,862 related to unrestricted activity and £243,643 was on restricted funds.

Hestia's policy is to hold unrestricted free reserves of up to 6 months' operating costs, a target of £8,176,609 based on expenditure in the current year 2012-13. As at 31st March 2012 the charity held £6,550,000 (4.8 months' worth).

The charity anticipates a surplus of £404,104 in 2012-13, and a deficit of £493,757 in 2013-14. Both figures largely relate to unrestricted activity and, therefore, free reserves are unlikely to change significantly over the period.

Officer's Appraisal

Hestia is a well-established social care organisation with a strong network of partners in Ealing. It has identified the need for the proposed work and enlisted the support of local GPs, who are well-placed to identify isolated older people. The project will benefit from Hestia's experience of running comparable support activities, and there is already an established process whereby the charity recruits, screens, trains and supports volunteers.

Hestia hopes to extend the project to other boroughs after the life of City Bridge Trust funding.

Recommendation

£50,000 over three years (£19,500; £19,000; £11,500) towards the salaries of a GP ReConnect Co-ordinator (12 hours per week) and a Volunteering Development Manager (3 hours per week) together with on costs; conditional on the charity raising the balance of funding from other sources.



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)

11389

Date Received:

20/09/12

Programme
Area:

5

1. About your organisation

Name of organisation applying for grant: Hestia Housing and Support	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence Sovereign Court 1st & 2nd Floors MAYA HOUSE 15-21 Staines Road 134-138 BOROUGH HIGH STREET Hounslow Middlesex LONDON TW 28/3/13	
Postcode: TW3 3HR SE1 1LB Is this your home address? Yes 20 SEP 12	
Contact person: Ms Helen Bedser	Position: Director of Performance and Development
Phone: 0208 538 2959	Fax: 020 8572 5617
E-mail: helen.bedser@hestia.org	
Website: www.hestia.org	
Legal status of organisation: Registered Charity and Company Limited by Guarantee	
If registered, please give charity number: 294555	
Year and month organisation established: July 1970	

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) GP:Reconnect will reduce isolation & improve the health & well-being of older Londoners, by improving their access to volunteering opportunities and social & educational activities.
How much funding is requested? Year 1: £19441.5 Year 2: £19041.5 Year 3: £11518.0 Total: £50000

3. Aims of your organisation

Vision: Empowering People, Changing Lives

Mission: To deliver high quality and empowering housing, support, protection and care services in partnership with service users and local communities, to groups including older people, victims of domestic violence, people with mental health needs, ex-offenders, people with HIV/AIDs and people with alcohol and/or substance misuse problems.

Values: Supportive; Caring; Client Focused; Dedicated; Principled

4. Main activities of your organisation

Our main activities are the provision of:

- Volunteer and community empowerment projects supporting service users and local people to get involved and make a difference in their local communities
- Community-based support and day services for vulnerable including older people
- Specialist housing projects providing safe and supportive accommodation to a range of vulnerable people including people who have experienced domestic violence, abuse, a stay in hospital or prison and homelessness

Last year we worked with over 1570 vulnerable people across our housing, support and day services and engaged over 2000 people in our volunteer and community empowerment projects.

Hestia hosts the Ealing Local Involvement Network which brings us into touch with large numbers of both active older people who are concerned about health and social care issues locally, as well as isolated older people who are often the recipients of these services.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
256	63	10	90

6. How do you support your volunteers?

Volunteers receive induction, training, supervision and recognition for their contribution. Hestia has adopted the Volunteers Management Charter and completed the Volunteers Management Health Check. We are working towards Investors in Volunteering.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	10 months

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	239,263
Activities for generating funds	
Investment income	84,981
Income from charitable activities	14,779,169
Gain on investments	17,498
Total Income	15,120,911

Expenditure:	£
Charitable activities	14,280,788
Governance costs	75,167
Cost of generating funds	37,451
Other	
Total Expenditure	14,393,406
(Deficit)/surplus for the year:	727,505

Asset position at year end	£
Fixed assets	1,901,408
Investments	1,714,555
Net current assets	6,202,989
Long-term liabilities	
*Total A	9,818,952

Reserves at year end	£
Endowment funds	
Restricted funds	1,715,943
Unrestricted funds	8,103,009
*Total B	9,818,952

* 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?
58%

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: Sep	/ 2007	Ref: 8026	Grant received: £withdraw	OR application rejected		<input type="checkbox"/>
Month/Year: Sep	/ 2007	Ref: 8341	Grant received: £45000	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) City of London	0	0	0
(ii) London Boroughs (various)	3151805.15	5032199.61	8014800
(iii) London Councils	0	0	0
(iv) Health Authorities	0	0	0
(v) Ministry of Justice (2 grants)	1240000	1240000	1240000
(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
Oak Foundation	0	121,413
Wandsworth Voluntary Grants	0	90607
Children in Need	0	53638
Kensington and Chelsea Voluntary	0	49938
Ealing Early Years	0	38000
Other grants (various)	99754	159,181

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

Hestia has a Sustainability Policy which aims to raise awareness, educate and provide practical guidance to staff, students, service users, volunteers and others on sustainable working practices across the organisation. Each service has a Local Sustainability Action Plan which aims to identify and address any gaps in sustainable working practices. Service sustainability action plans are audited as part of our Internal Inspection Policy & Procedure.

Our on-line training programme "Environmental Awareness and Sustainability" is mandatory for all staff.

Hestia is committed to working with socially responsible suppliers. Any suppliers used are asked to provide details of their sourcing and sustainable policies and to demonstrate their commitment to ethical work practices.

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.

Older people are particularly vulnerable to social isolation (Age UK 2011). Social isolation adversely affects physical and mental health and well-being (Pitkala, K.H. et al. 2009). Involvement in educational and social activity groups is proven to significantly alleviate isolation in older people (Cattam M et al. 2005). Older people are the main users of GP services and the GP practice is often the first place an older person turns to for help and support. In Ealing there are 35,000 older people: 21,000 older people live alone and 3000 older people have depression (JSNA 2011).

As well as having needs, there is increasing recognition of the role older people can play in developing the personal capacity of others through volunteering projects. People who use Community Navigator services report that they were less socially isolated following the intervention (Windle G et al. 2008). The Ealing LINK, the Chair of the GP Commissioning Consortia, the Director of Public Health and the Joint Commissioning Manager for Older People services have all expressed their enthusiastic support for the project.

There are a number of small-scale home visiting services in parts of Ealing playing a crucial role in reducing isolation for the very frail and housebound older people. However there are also many other isolated older people who have lost confidence and/or lack awareness of social and educative groups available locally and need some support to gain knowledge and confidence to go out and meet others. Existing home visiting services for older people are delivered by professionals or volunteers, but not by design, other older people as peers. In our experience peer support is powerful because they have an ease of communication and a sense of empathy with other older people as well as credibility with the other older person.

GP:ReConnect will employ a volunteer coordinator who will recruit, train and support older people from the local community in Ealing to volunteer Community Navigators roles. Volunteer Community Navigators will be linked to GP practices in deprived areas of Ealing and provide support and information to socially isolated older people; helping them to access courses, clubs, groups, activities and social network building opportunities that exist locally.

Hestia has identified three key objectives from the Project:

- GP: ReConnect will deliver a GP-based volunteer community navigator service to 80 isolated older people in deprived parts of Ealing over 2.5 years; helping them to access advice, information, social and leisure clubs, courses, services, activities and groups and social network building opportunities that exist locally. Supporting them to become more physically and mentally active and increase their social networks; so reducing their sense of isolation and use of health services.
- GP: ReConnect will recruit, train and support 40 active older people from Ealing, over 2.5 years, to volunteer community navigator roles, who will support isolated older people in deprived parts of Ealing; harnessing active older people's time, energy and talents to make a difference to another older person's life and equipping active older people with new skills, social capital and a sense of well-being.
- GP: ReConnect will involve service users, volunteers, GPs, other statutory and community stakeholders in shaping the future delivery of the project, to demonstrate its value and effectiveness and potential for further replication and to ensure that the project is sustainable beyond the initial two years.

Hestia is the Host organisation to the Ealing Local Involvement Network, this brings us into touch with significant numbers of both active older people who are concerned about health and social care issues locally, as well as isolated older people who are often the recipients of these services. Hestia also provides a thriving Age Activity Centre for over 120 older people. The centre offers a range of social and learning-based activities that enrich older people's personal and practical skills and social networks. Hestia has a successful volunteering programme and we currently have 90 volunteers in a range of roles including mentors and befrienders.

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

We will put the following monitoring processes into place:

- Establishing a project steering group which will meet monthly and use reflective practice to explore the areas of learning
- Conducting a survey with each older person before and after their involvement with the project using questions directly linked to the projects outcomes
- Providing staff and volunteers with an opportunity to reflect on their experience of the project
- Collecting equality and diversity monitoring statistics about the older people involved in the project

We will use the information gathered to evaluate the project internally, both during and after the project, to ensure that it is achieving its outcomes. We will also commission an independent external evaluator to rigorously evaluate the project and provide us with a robust body of evidence on its effectiveness.

17. Beneficiaries

How many people will benefit from the grant per year? **60**

In which local authority is your organisation based?

London Borough of Hounslow

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

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

London Borough of Ealing

At what address will the activity be located? **Ealing Community Resource Centre (office base), GP surgeries in Ealing**

What age group will benefit? **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?
This will depend on participants - the project will be open to all.

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
GP ReConnect Co-ordinator Salary	16715	16715	8356.8	41786.8
Volunteering Development Manager	7729	7729	3864.4	19322.4
Staff training and travel costs	334	334	166	834
Volunteer expenses	4160	4160	2080	10400
Office costs (IT, phone, post, print)	2032	2032	1015	5079
Office rent	2880	2880	1440	7200
Room Hire	1080	1080	540	2700
Insurance	167	167	83.57	417.57
Recruitment	400	0	0	400
Evaluation	0	0	2000	2000
Central management costs and services	3944	3944	1972	9860
TOTAL	39441	39041	21518	100000

What income has already been raised?

(List amounts and main sources)

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

What other funders are currently considering the proposal?

We have applied to the Health and Social Care Volunteering Fund for a 50% contribution to the costs.

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 £
GP ReConnect Co-ordinator Salary	8357.5	8357.5	4178	20893
Volunteering Development Manager	3864.5	3864.5	1932	9661
Staff training and travel costs	167	167	83	417
Volunteer expenses	1601	1601	1040	4442
Office costs (IT, phone, post, print)	1016	1016	507.5	2539.5
Office rent	1440	1440	720	3600
Room Hire	540	540	270	1350
Insurance	83.5	83.5	41.8	208.8
Recruitment	400	0	0	200
Evaluation	0	0	1500	1500
Central management costs and services	1972	1972	1245	5189
TOTAL	19441.5	19041.5	11518.0	50000

20. Funding requested from the Trust (continued)

When will the funding be required? **January 2013**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **We are hopeful that over the course of the project we will be able to build a robust case for future support which can then be used to attract more funding from other voluntary and statutory funders. We believe that this project has the potential to be replicated nationally and will aim to replicate it in other areas where we have relevant services, as well as providing advice to other organisations.**

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, **Helen Bedser** (your name)

am an authorised representative of

Hestia Housing and Support (your organisation)

within which I am **Director of Performance and Development** (your position)

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

Signature



Date **17.09.2012**

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

Please

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

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

Kingston Centre For Independent Living

Ref: 11497

Amount requested: £133,653

Adv: Ciaran Rafferty

Base: Kingston

Benefit: Kingston

Purpose of grant request: An independent support planning and brokerage service for people with learning or physical disabilities, sensory impairments or mental health needs in Kingston upon Thames.

Background

Kingston Centre for Independent Living (KCIL) has been around since 1968 and is a genuinely user-led organisation serving the needs of disabled people (and their families/carers). Its services currently comprise: general information and advice; support and advice for people who directly employ Personal Assistants to meet their care and support needs; welfare/benefits advice; administration of the local authority grants scheme for holidays for disabled people; and the regular production of a quarterly newsletter, the *Kingston Independent*. A new service (funded from reserves initially) will provide supported volunteering opportunities underpinning other core services.

Funding History

You have supported KCIL on two previous occasions. In 2002 you awarded £58,000 over two years for a Community Development Officer while in 2006 £105,000 over three years helped with a project to target services to people from BME communities. Both grants were satisfactorily monitored.

Current Application

This proposal is to provide specialist advice and assistance for people to manage their personal budgets, through a "support-brokerage" service. Members will be aware of the change from local authorities directly providing (or arranging) the day-to-day care needs of disabled people to the provision of personal budgets whereby the individual is given the money to make their own choices (the Personalisation Agenda). This better supports their independence of course but only where they are able to make informed decisions. Hence the need for brokerage services such as this which will provide independent advice and guidance to the budget-holder (ie not influenced by an actual or potential service provider). The project will also be open to those who are self-funding their care as their need for impartial, independent, advice is equally important.

The project will provide information and guidance on potential service providers; will help individuals structure and plan their care packages; assist people in their appeals for funds where they have a case; map local services and create an accessible database; and use the information and learning from contact with disabled people to inform and improve the services on offer. The organisation expects to support 200-250 service users over three years, where each case will have an average duration of 4-6 weeks – although the Support Broker will probably have some input into the reviews carried out by Care Managers roughly six weeks later.

Financial Observations

Accounts for the year ending 31st March 2012 show a surplus of £22,942 which represents 8.5% of turnover. Free unrestricted reserves held at that point were £162,044 (just less than 8 months' total expenditure) against a policy to hold 3 months' worth (which would equal £61,657). Since 31st March 2012 the organisation has earmarked up to £80,000 of this £100k surplus on free reserves to cover several items (eg the pump-priming of a supported volunteering programme as referred to in the introduction above; the cost of possible redundancies and shortfall in core income should a major contract not be renewed in September 2013; and some funds allocated to the project at the heart of this application). The organisation intends to show these funds as formally designated in the audited accounts for 2012/13.

The latest forecast for the current year to 31st March 2013 shows an overall deficit of £13,593, whilst the budget for the following year 2013/14 shows a surplus of £9,876.

Officer's Appraisal

KCIL has had support from the local authority for many years and it has been entrusted by them to manage the local authority's holiday grants scheme for disabled people. It is also highly regarded by its clients and is true to its values in being genuinely user-led. The Support Broker service at the heart of this application is much-needed and very important to ensuring that disabled people have independent and reliable advice on commissioning their various care services and other resources for their day-to-day needs.

Recommendation

£133,000 over three years (£45,000; £43,000; £45,000) for the salary of a full-time Support Broker and associated 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)

11497

Date Received:

20 11 12

Programme
Area:

6

1. About your organisation

Name of organisation applying for grant: KCIL	
If the organisation is part of a larger organisation, what is its name? n/a	
Address for correspondence River Reach 31-35 High Street Kingston upon Thames Surrey	
Postcode: KT1 1LF Is this your home address? No	
Contact person: Ms Theo Harris	Position: CEO
Phone: 020 8546 9603	Fax: 020 8546 7947
E-mail: theo.harris@kcil.org.uk	
Website: www.kcil.org.uk	
Legal status of organisation: Charity and Limited Company	
If registered, please give charity number: 06240260	
Year and month organisation established: 1968	

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) An independent support planning and brokerage service for people with learning or physical disabilities, sensory impairments or mental health needs in Kingston upon Thames.
How much funding is requested? Year 1: £44,922 Year 2: £43,880 Year 3: £45,051 Total: £133,653

3. Aims of your organisation

KCIL aims to support disabled people (and people with long-term illnesses) to achieve inclusion and independence. We do this by:

- Providing quality support services that meet the needs of disabled people;
- Eliminating social and attitudinal barriers to the full inclusion for disabled people;
- Influencing the development of local and regional policy and campaigning on issues of national relevance;
- Working in partnership with like-minded organisations to achieve our goals;
- Creating a sustainable organisation by ensuring that all our work is fully funded; have a broad range of funding streams allowing us to invest in the development of new services which meet local needs;
- Raising our profile with disabled people, organisations in the voluntary and community sector, local business and with the general public.

4. Main activities of your organisation

Information & Advice - Telephone and drop-in service to provide disability related information and signposting.

Self-directed Support - Ongoing practical support and advice for people who directly employ Personal Assistants to meet their care and support needs. This fully comprehensive service includes training for PAs and disabled employers, ongoing support to manage direct payments including, monitoring and compliance.

Get ACTIVE - Affecting Change Through Inclusive Volunteer Engagement is a new participatory action project that will incorporate a number of small projects including peer support and information and signposting for the planned brokerage project.

Welfare Benefits Advice - Practical support and advice to disabled people applying for disability or other benefits and support with appeals and tribunals. Thei project will also enhance the brokerage service by providing options for income maximisation.

Holiday Grants - Administration of the local authority grant for disabled people.

Kingston Independent - a quarterly newsletter and the KCIL.org.uk website which attracts upto 1000 unique visitors each month.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	5	8	7

6. How do you support your volunteers?

We have developed a new Volunteering Project with a designated Volunteer Coordinator to ensure that all volunteers at KCIL receive a full induction, regular supervision and are encouraged and supported to take up training opportunities.

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?
Lease/rented	1 year

8. Finance

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

Financial year ended -

Month: **March**

Year: ~~2011~~ **2012**

Income received from:	£
Voluntary income	265,876
Activities for generating funds	1,268
Investment income	342
Income from charitable activities	0
Other sources	1,817
Total Income	269,303

Expenditure:	£
Charitable activities	222,784
Governance costs	23,577
Cost of generating funds	0
Other	0
Total Expenditure	246,361
(Deficit)/surplus for the year:	22,942

Asset position at year end	£
Fixed assets	0
Investments	0
Net current assets	177,432 154,490
Long-term liabilities	0
*Total A	177,432

Reserves at year end	£
Endowment funds	0
Restricted funds	15,388
Unrestricted funds	162,044
*Total B	177,432

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

*Caroline
7/2/13*

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
99%

10. Material changes

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

At the October 2012 AGM the members agreed to the geographical change allowing us to provide services "in and around Kingston. This was registered in October with the Charity Commission and they have not notified us of any issues. Until April 2010, KCIL has paid out direct payments to disabled individuals on behalf of the local authority. Accounts for the year end March 2011 there residue of approx £0.5M paid out in the first quarter.

11. Previous applications to the Trust

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

Month/Year: *Apr March* / 2006 Ref: Grant received: £105,000 OR application rejected

Month/Year: - *Sept* / - *2002* Ref: Grant received: £ *58,000* 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) Royal Borough of Kingston	1,808,404	2,035,894	730,196
(ii) ,			
(iii)			
(iv)			
(v)			
(vi)			

13. Previous grants received

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

	Year: 2010	Year: 2011
Wates Foundation	7,500	-
Donations	531	994

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

In order to reduce our carbon footprint we take the following action:

KCIL operates an environment policy which has set out steps for reducing waste and conserving energy. We recycle or reuse as much material as possible. KCIL has recently sWe reduce waste by recycling, reusing materials and ordering sustainable or recyclable products where possible.

-We reduce the amount of documents and e-mails printed, and encourage double-sided printing

-We reduce energy usage by turning off lights and equipment not in use, and not leaving equipment on stand-by unless absolutely necessary. All lights and most equipment are turned off overnight.

-We encourage staff and volunteers to travel by public transport or on foot, and share car journeys with colleagues when going on work business.

-We use local companies for deliveries of stationery and office products or equipment.igned up the Royal Borough of Kingston Green Pledge.

15. Purpose

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

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

We are applying under the 'Positive Transitions to Independent Living – Support for disabled people in managing independent living and 'personal budgets' theme. KCIL is a charity that promotes independent living for disabled people. We are unique locally in that we are the only user-led organisation to provide support to people with all disability types. We seek funding for 3 years to provide support brokerage to people in receipt of personal budgets as well as those who fund their own care. The overall aim of this service will be to give disabled people better choice and control over their day-to-day care by helping them to identify a wide range of support options and then setting up a suitable care package to help them live independently in their own homes. The project will be open to people with physical and learning disabilities, sensory impairments or mental health conditions. The Project aims to:

- Improve choice and control by offering a wide range of support options;
- Increase people's independence by supporting them to secure appropriate care and support to remain in their own home;
- Improve their ability to deal with problems and or disputes around their care by accessing Peer Support or tapping into advocacy support provided by KCIL or other agency;
- Improve their health and well-being, and increase social inclusion.

To achieve this we will employ a Support Broker to provide final support planning, brokerage and initial service set up. The Broker will also supervise volunteers, promote the service and monitor service outcomes. Based on figures from other boroughs, we expect to support 200-250 service users for time limited (up to six weeks) support planning/brokerage over the three year period.

The Support Broker will:

- Provide information, support and guidance to complete support plans
- Set up support packages to meet assessed / identified need within a set budget.
- Provide input to initial reviews of support packages carried out by Care Managers/Social Workers

We will offer person-centred support brokerage to meet specific needs by providing one-to-one sessions, home visits and outreach work support over a period of 4-6 weeks. The service will also be able to refer people to other KCIL services such as peer support, benefits advice to maximise income, support to recruit, manager and train Personal Assistants, advocacy to deal with disputes and volunteering opportunities. Evidence from disabled people, RBK and other agencies show there is a need for this project as there are currently no independent support brokerage services in Kingston and this limits choice. Disabled people going through RBK in-house brokerage service have reported that some social care staff do not meet their specific needs which has made the process of applying for social care virtually impossible.

The council had aimed to have all social care users on personal budgets by April 2012 however this has proven difficult to achieve. There is also evidence from the Putting People First 'People who pay for care' Report that there is a direct link between government cuts and an increase in self-funders thus for a growing number of people our proposed project will be their only option for support planning and brokerage services. We will involve service users by actively seeking their feedback to help develop the project and service users will deliver some aspects of the service via the Peer Support Group. A number of representatives from other voluntary sector organisations have shown an interest in being on a project steering group.

KCIL operates a number of policies which ensure that all those who work for or with KCIL are not discriminated against and are given equal opportunities irrespective of their age, disability, race, gender, sexual orientation and religion or beliefs. KCIL ensures volunteers have clearer roles and are offered training and personal development opportunities; we invite volunteers to take part in developing our strategy.

(Full proposal details on continuation sheet). * *on file*.

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

All enquiries will be recorded to include action taken, details about service user, referrals to other services, type of disability, ethnic background, age so we get a picture of our client base. Each service user will have a case file with detailed information about their specific case, actions taken and a follow-up procedure; this will help us determine whether we are meeting clients' needs. Stakeholders will be asked for feedback (service users, their families/ carers, professionals, internal staff/ volunteers and social services colleagues); this will include quantitative and qualitative feedback so we know how effective the service is and make improvements or changes where it isn't. Quarterly reports will be produced for internal use (KCIL trustee board) and an annual impact report which shows the outcomes and well as areas for improvement. Finally, our Get ACTIVE reference group will play a part in reviewing the service. We will also adhere to our data protection and confidentiality policies.

17. Beneficiaries

How many people will benefit from the grant per year? 70 +	
In which local authority is your organisation based? Kingston upon Thames	
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Kingston upon Thames	
At what address will the activity be located? River Reach, 31-35 High Street, Kingston upon Thames, Surrey, KT1 1LF	
What age group will benefit? 16+	
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 £
Salaries including on-costs	39,947	29,815	30,709	100,471
Recruitment costs	2,300	-	-	2,300
Staff training and expenses	700	500	500	1,700
Volunteer training and expenses	3,100	3,178	3,258	9,536
Office costs and publicity	3,250	3,250	3,250	9,750
ICT costs	2,300	500	500	3,300
Building overheads contribution	3,500	3,605	3,713	10,818
Management & supervision	3,125	3,032	3,121	9,278
TOTAL	58,222	43,880	45,051	147,153

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
KCIL Reserves	13,300			
TOTAL				

What other funders are currently considering the proposal?

n/a

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 £
FT Support Broker	28,947	29,815	30,709	89,471
Recruitment	1,800			1,800
Volunteer training/expenses contribution	1,300	3,178	3,258	7,736
Office costs & publicity	3,250	3,250	3,250	9,750
ICT costs	2,300	500	500	3,300
Building contribution	3,500	3,605	3,713	10,818
Staff training	700	500	500	1,700
Management & supervision	3,125	3,032	3,121	9,278
TOTAL	44,922	43,880	45,051	133,853

20. Funding requested from the Trust (continued)

When will the funding be required? **Jan 2013**

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

If so, how will it be resourced? **We anticipate that there will be an ongoing need for the work of the project beyond the funding period and so we will embark on fundraising strategy mid way through the three year period.**

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, **Theo Harris** (your name)

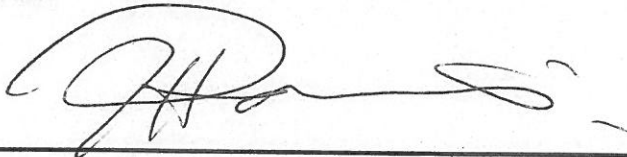
am an authorised representative of

KCIL (your organisation)

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

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

Signature



Date

27.11.2012

Return the completed form to: The City Bridge Trust

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

- **do not send this application by fax or e-mail** – unless applying online, applications must be posted to the Trust
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- **do send only the information in the checklist** – if further information is required, we will contact you
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- **do use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

MEETING: 18/04/2013

ANNEX NUMBER: 11

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

Muscular Dystrophy Campaign

Ref: 11618

Amount requested: £42,538

Adv: Ciaran Rafferty

Base: Southwark

Benefit: Several London boroughs

Purpose of grant request: A work experience programme for young disabled people to enhance their work based skills, increase their self-confidence and improve their chances of finding employment.

Background

Muscular Dystrophy Campaign (MDC) was established in 1959 to improve the lives of people affected by muscle disease. Muscular dystrophy is an umbrella term for over sixty relatively rare and progressive muscle-wasting conditions for which there is currently no cure. Although the effects and related symptoms caused by muscle disease vary, the common trait is that those affected will be physically disabled and often reliant on others for their personal care. The charity's work is aimed at both improving the lives of people currently affected by muscle wasting conditions and at investing in research to establish cures and treatments for the future. One of the most impressive strands of MDC's work is in mobilising and supporting its 400 younger members (the *Trailblazers*) to successfully lobby and campaign for changes to services so that barriers to access are reduced. Current campaigns include "The Big Picture" which is helping cinemas cater more fully for disabled patrons. A group of Trailblazers also spoke to the Transport Select Committee in March to highlight both their concerns and their solutions on public transport.

Funding History

You have supported MDC on three previous occasions. In late 2001 you awarded £23,000 over two years for a Family Care Worker. You then, in May 2008, awarded £90,000 over two years for an Expert Patient Network for London, followed by a third year's support of £40,000 in September 2010. All grants were successfully monitored.

Current Application

This application is for a project targeting the 100 or so London-based Trailblazers. It recognises that these young people not only face barriers to employment but also to gaining work experience. Many potential host organisations are scared of what might be involved and focus too much on what the practicalities for them might entail rather than on what

benefits the young person might bring to their organisation. A limited pilot scheme is operating within MDC (an organisation of some 50 staff) which hosts someone on work experience. This has proved to be really successful and so the organisation wants to expand the in-house scheme to provide more opportunities across more departments. Each placement is personally tailored (related to their individual skills and aspirations) and is formally structured so that progress and impact measurement can be achieved. Complementary support (eg assisting with CV compilation) will also be provided. In addition, the scheme will work closely with other potential employers (some are already signed up) so that they become better able and more willing to take disabled young people on work experience.

Financial Observations

Audited accounts for the year ended 31st March 2012 show a surplus of £424,000 (6.7% of turnover). At the year-end unrestricted free reserves stood at £369k equating to almost 1 months' worth of total expenditure (based on the 2013/14 budget). The charity has recently advised that it intends to increase unrestricted free reserves to £1.5m by 2015 - equivalent to 3.7 months' worth of total expenditure.

The forecast for 2012/13 shows an overall surplus of £549k (12.2% of turnover), which comprises a surplus of £599k on unrestricted activity and a deficit of £50k on restricted funds. Whilst an overall surplus is forecast for the year, income is estimated to total £4.488m which is a decrease of £1.8m (29%) on the previous year. This fall is largely due to a fall in fundraised income but also partly due to 2011/12 being the final year in which the organisation received additional income (£641k) from it being the 2009/10 Tesco Charity of the Year and due to a reduction of £205k (18%) in legacy income. The unrestricted funds surplus of £599k is forecast to increase free reserves to £968k - equivalent to 2.4 months' worth of expenditure.

The budget for the current year to 31st March 2014 shows income marginally increasing to £4.726m and an overall deficit of £147k. However, whilst this comprises a deficit on restricted funds of £508k, it also includes a surplus of £361k on unrestricted activity which should further increase free reserves to £1.329m - equivalent to 3.3 months' worth of expenditure.

Officer's Appraisal

MDC's commitment to supporting and giving voice to disabled young people is exemplary while the work of the Trailblazers in bringing their needs to the attention of government and policy makers has been very effective. This project will provide much-needed and, sadly, all too rare opportunities for young disabled people - some of whom are graduates - to gain work experience. It will also endeavour to change the opinions and practices of other employers and organisations so that more

opportunities are made available in the future. With your funding the current in-house scheme will be expanded to offer experience in marketing, design, research, fiancé, HR, fundraising and corporate liaison.

Recommendation

£42,500 over two years (£21,000; £21,500) towards the salary and project costs of a work-experience programme for young disabled Londoners.



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)

11618

Date Received:

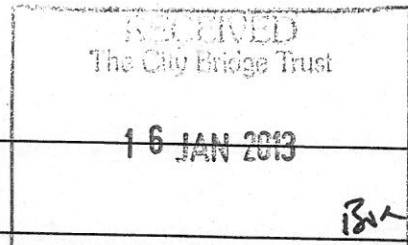
16/01/13

Programme
Area:

6

1. About your organisation

Name of organisation applying for grant: Muscular Dystrophy Campaign	
If the organisation is part of a larger organisation, what is its name? N/A	
Address for correspondence 61 Southwark Street, London	
Postcode: SE1 0HL	
Is this your home address? No	
Contact person: Mr Peter Sutton	Position: Trust Fundraiser
Phone: 0207 803 4818	Fax: 0207 401 3495
E-mail: p.sutton@muscular-dystrophy.org	
Website: www.muscular-dystrophy.org	
Legal status of organisation: Registered charity	
If registered, please give charity number: 205395	
Year and month organisation established: May 1959	



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) A work experience programme for young disabled people to enhance their work based skills, increase their self confidence and improve their chances of finding employment.
How much funding is requested? Year 1: £20,955 Year 2: £21,583 Year 3: £ Total: £42,538

3. Aims of your organisation

'Muscular dystrophy' is an umbrella term for 60, mainly genetic, conditions characterised by weakening and wasting of the muscles. All these conditions are serious and progressive, with effects ranging from mild to severe disability and premature death, typically in childhood or early adulthood. There are currently no cures for any of these conditions.

Founded in 1959, the Muscular Dystrophy Campaign (MDC) aims to achieve a world where muscle-wasting conditions are not a barrier to quality or length of life and do not lead to isolation, through research into treatments and cures, providing support services, raising awareness of the conditions, and funding specialist equipment. We are the only UK charity supporting all 60 conditions, working closely with the 70,000 adults and children living with the conditions across the UK, as well as the estimated 350,000 people indirectly affected as relatives and carers.

4. Main activities of your organisation

The charity's work is aimed at both improving the lives of people currently affected by muscle wasting conditions and investing in research to establish cures and treatments for the future. Programmes of work include our Information Service, which handles over 6,000 queries a year and provides expert materials on condition management and care advice. We also operate a rapidly growing Advocacy Service, which since 2011 has secured over £1million worth of essential statutory support for people with severely disabling conditions. Such support can dramatically improve health outcomes and independent living.

In order to facilitate peer to peer support, we run a number of beneficiary-led support and awareness-raising Community Support Networks across the UK as well as the Trailblazers, a campaigning and support network for young disabled people. We also support a range of pioneering research projects into treatments and cures and there is now a real possibility of developing treatments for some conditions within the next ten years.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
43	11	13	2562

6. How do you support your volunteers?

We have volunteers across the UK and provide them with a range of advisory material and frequent contact with our London based staff. Volunteers can fundraise and take part in campaigns as well as have the opportunity to work from our headquarters.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	3.5 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	5,810,000
Activities for generating funds	79,000
Investment income	115,000
Income from charitable activities	299,000
Other sources	3,000
Total Incoming Resources	6,306,000

Expenditure:	£
Charitable activities	3,623,000
Governance costs	45,000
Cost of generating funds	2,214,000
Other	0
Total Resources Expended	5,882,000
Net (Deficit)/Surplus:	424,000
Other Recognised Gains/(Losses)	21,000
Net Movement in Funds	445,000

Asset position at year end	£
Fixed assets	182,000
Investments	2,950,000
Net current assets/(liabilities)	(436,000)
Long-term liabilities	(89,000)
*Total A	2,607,000

Reserves at year end	£
Unrestricted funds	596,000
Restricted funds	1,697,000
Endowment funds	314,000
*Total B	2,607,000

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
0%

10. Material changes

Describe any material changes to the organisation's activities, structure or financial position since the date of the most recent accounts:
From 1st April 2012, the Neuro Muscular Centre (a Cheshire-based subsidiary charity of the Muscular Dystrophy Campaign) became an independent charity.

11. Previous applications to the Trust

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

Month/Year: <i>Oct Sept</i> / 2010	Ref: 10034	Grant received: £40,000	OR application rejected <input type="checkbox"/>
Month/Year: <i>Oct May</i> / ²⁰⁰⁸ 2007	Ref: 8645	Grant received: £90,000	OR application rejected <input type="checkbox"/>
Month/Year: <i>Aug Nov.</i> / 2001	Ref: 1564/AA	Grant received: £38,000	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) None			
(ii) None			
(iii) None			
(iv) National Health Service	£0	£82,997.75	£143,925.08
(v) None			
(vi) None			

13. Previous grants received

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

	Year: 2010	Year: 2011
Below £1,000	76	81
£1,000-£4,999	35	37
£5,000-£9,999	10	15
£10,000-£99,999	9	10
1 x £250,000	0	1- G Weston
Total number of grants	130	150

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

All our printers use a low ink resolution and, in order to save paper, we use double sided printing settings. We also use recycled paper in all of our printing. The charity has cycle parking facilities available at our premises to encourage staff to travel by alternative methods of transport. We have recently been given an award by the Paper Round BPR Group (a London based recycling company) for our recycling efforts over the last year, which has amounted to the equivalent of saving forty-one trees.

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.

Many young disabled people are as ambitious and as well qualified as their non-disabled peers. However, when it comes to obtaining work experience, many find themselves disadvantaged:

- Disabled people in their early 20s are twice as likely to not be in employment, education or training as non-disabled young people (Equalities and Human Rights Commission, 2010)
- 70% of Trailblazers are looking to enhance their CVs as they are currently students or unemployed (2011)
- 83% of Trailblazers have looked for work experience but half of these respondents have encountered serious difficulties in finding it (2012)

In response to this, we are setting up a pilot work experience project at MDC headquarters over two years, where beneficiaries can gain experience in Departments that closely match their interests, take part in CV and job application workshops and participate in peer-to-peer mentoring schemes. We will recruit participants from London-based Trailblazers, around 90% of whom have expressed clear interest in the scheme and view it as a 'stepping stone' to future employment. We will also be using links with NUS Diversity Officers at London Universities to publicise the scheme on campus and identify young disabled people who could benefit. We anticipate that the scheme will benefit around 30 young disabled people. Placements will typically be 1-3 months long but, as many young disabled people known to us are in Higher Education or do not have permanent access to a support worker, the timescale will be flexible. Home working will also be available if mobility or care issues mean people are unable to travel to the office. Participants will work closely with their allocated team/s to gain experience including research projects, liaising with clients, designing promotional materials, contributing to the MDC website and organising events.

As well as practical experience building the skills and confidence needed to obtain employment, we will deliver quarterly 'employability workshops', focussing on CV building, tips on job applications and advice on job hunting. These will be run by 4 Trailblazers working with firms in London, who have offered to participate in the scheme. We will also invite corporate representatives to visit our offices to meet participants and to address misconceptions about employing disabled people, such as concerns about the costs and difficulties of reasonable adjustments. We hope this will also present an opportunity to develop further links with corporates with a view to increasing the number of young disabled people taking up internships and offers of employment.

We have a proven track record of working with and delivering projects for young disabled people through our Trailblazers network. This has a membership of 475 from which a number of participants will be drawn for this project. Trailblazers staff will be responsible for this new project. The project will enable us to develop our programme of work for young people and, by also recruiting from outside the Trailblazers network, allow us to expand our reach.

As an organisation, we value and support our volunteers (see Q6), who come from a wide range of social and ethnic backgrounds and who play a key role in determining the campaigning topics and focus of our charity. We are also taking a number of steps to reduce our carbon footprint (see Q14). Our project closely meets the priorities set out in the 'Positive Transitions to Independent Living' programme. The transition to employment can be prolonged and difficult for disabled people, especially when their non-disabled peers may be quickly obtaining jobs and beginning careers. The targeted experience and support we will offer will help smooth this transition and mitigate some of the inequalities that these young people face when looking for work experience or employment.

The project will achieve the following objectives:

- Enable 30 young disabled people to gain the skills and confidence needed to find employment
- Equip attendees with the skills to produce high quality CVs and job applications.
- Increase companies' interest in offering young disabled people work experience/employment
- Increase the reported independence and confidence of 30 young disabled people, through equipping them to seek further work experience or paid employment.

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

Quantitative data recorded throughout the project will include numbers taking part, number of company representative visits, workshops delivered and departments worked with. Participants will fill in an assessment form at the start of the placement, focusing on skills they wish to develop and how confident they feel about looking for work; this will form part of our baseline data. Progress will be monitored at regular mentor meetings throughout the placement and a final evaluation form completed at the end, giving each participant the opportunity to reflect on the skills they have developed and how useful they feel the experience has been to them overall. We will use these to record positive feedback and make a careful note of difficulties, which will help inform any changes we might make to project delivery. Participants will be asked to write an extended blog post after completing their placement, summarising the overall experience and skills they can take forward; and contacted every 2 months thereafter to monitor whether they are in employment, have applied for jobs, had interviews, or have accessed further work experience, and whether they feel their MDC placement has helped them in this. We will collect comments from corporate visitors on their visit's impact on their perceptions of disabled people in the workplace. Feedback from members of staff will also contribute to our evaluation, focusing on individual interns' performance. Monitoring data will be reviewed regularly and used to evaluate overall success in achieving project objectives - specifically growth in participants' skills and confidence, level of interest expressed by company representatives, and evidence gathered to support future employment /employability work.

17. Beneficiaries

How many people will benefit from the grant per year? 15			
In which local authority is your organisation based? Southwark Council			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Recruitment for the project has not yet begun, but we anticipate boroughs to include Newham, Hackney, Hounslow, Barking & Dagenham and Enfield			
At what address will the activity be located? 61 Southwark Street, London,			
What age group will benefit? 16-30			
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			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 £
Trailblazers Manager - 1 day per week	£7,885	£8,121		£16,006
Campaigns Officer - 1 day per week	£5,078	£5,230		£10,308
Support from other Departments	£3,120	£3,214		£6,334
IT Support	£3,986	£4,106		£8,092
Communications (telephone, post etc)	£886	£912		£1,798
TOTAL	£20,955	£21,583		£42,538

What income has already been raised?

(List amounts and main sources)

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

What other funders are currently considering the proposal?

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 £
Trailblazers Manager-1 day per week	£7,885	£8,121		£16,006
Campaigns Officer- 1 day per week	£5,078	£5,230		£10,308
Support from other Departments	£3,120	£3,214		£6,334
IT Support	£3,986	£4,106		£8.092
Communications (telephone, post etc)	£886	£912		£1,798
TOTAL	£20,955	£21,583		£42,538

20. Funding requested from the Trust (continued)

When will the funding be required? March 2013
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? We will assess whether the project is currently meeting its outcomes at the end of Year 1, which will inform how the project proceeds after the completion of the pilot. Should it be successful, we anticipate a wider roll out. If outcomes are not fully met, we will look at ways of adapting the project. Funding for either of these options would come from Trusts, Corporates and Individual Donors.
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, Peter Sutton (your name)
am an authorised representative of
Muscular Dystrophy Campaign (your organisation)
within which I am Trust Fundraiser (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature  Date 14/01/2013

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

MEETING 18/04/2013

ANNEX NUMBER: 12

ASSESSMENT CATEGORY - Positive Transitions to Independent Living

Stroke Association

Ref: 11487

Amount requested: £80,855

Adv: Stewart Goshawk

Base: Islington

Benefit: London-wide

Purpose of grant request: Project to increase the skills, opportunities and employment prospects for disabled stroke survivors who are of working age and live in Greater London.

Background

Members will be familiar with the work of the Stroke Association, the national organisation working to improve the quality of life for people who have suffered a stroke. Sadly, about one-third of stroke sufferers do not survive and another third suffer serious and permanent disability or impairment. The remainder are able, through medical, social and therapeutic care, to regain many skills and to live a rich and fulfilling life (even if not at the full extent before their episode). The Stroke Association funds medical research into the causes and treatment of stroke; lobbies on behalf of stroke survivors for better care and treatment; and runs a range of direct services to improve the quality of life for individuals, their families and carers.

In 2008, the Government implemented a National Stroke Strategy, with £20m ring-fenced for the development of 'life after stroke' services. As a result, local information, advice and support services were established in 27 London boroughs commissioned through local authorities and the health service. Hospital services were also re-organised into 8 hyper-acute units across the capital. London is now one of the best-served cities in the world for stroke care.

Funding History

You have funded the Stroke Association twice before with grants of £62,000 in June 2001 for its information and advice service; and of £74,000 in June 2005 for work with young stroke survivors. Both grants were satisfactorily signed off.

Current Application

Stroke is generally perceived to be something that only affects older people. However, about 25% of those who suffer a stroke are of working age – which equates to around 3,000 Londoners - many of whom will want to continue in employment wherever possible. The Trust's previous grant to the organisation resulted in the establishment of a pilot "moving-

on project", a modular 10-12 week training course to enable younger stroke victims to regain their skills and confidence and to offer peer support amongst a group of individuals who can help one another. The project was also informed by the organisation's dealings with a large commercial employer which wanted to offer placements to stroke survivors but found that individuals were not sufficiently 'job ready' to take advantage of this offer. The feedback from the pilot course was most encouraging and the aim is now to roll the programme out across London.

Local schemes will be able to identify people they have helped who would benefit from this additional support and also help to build links with local employers that may have volunteer or paid opportunities to help introduce stroke survivors back to work. It is expected that over three years around 250 individuals (and thereby their families and carers) can be accommodated on the training. Understandably, not all participants will be successful in moving back into full-time paid employment, but all will have the opportunity to regain skills to help them engage better with mainstream society.

Financial Observations

The Stroke Association is a large national charity funded by a wide range of statutory contracts, grants and general fundraising. The audited accounts for the year ended 31st March 2012 show that, despite some income streams holding good, the organisation made a deficit of some £2.0m (6.5% of turnover), which the charity attributes to the harsh economic climate and the difficulty in securing new contract and grant income. This downturn was reflected on the charity's balance sheet as it moved from a holding of Net Current Assets of £2.0m as at 31st March 2011, to Net Current Liabilities of £654k as at 31st March 2012. However, the latest balance sheet also records a holding of fixed asset investments with a market value of £16.3m.

The organisation operates a complex reserves policy to provide funds to meet identified needs and to act as a buffer against fluctuations in income. As at 31st March 2012, unrestricted free reserves amounted to £9.0m and represented 5.3 months' worth of budgeted operating expenditure against a stated target of 6 months' worth.

In response to the operating deficit of £2.0m in 2011/12, the charity has initiated cost saving and income generating ideas. These appear to be working with the latest forecast for the current year 2012/13 showing the operating deficit falling to £680k. Further improvement is anticipated in the following year 2013/14 with the budget showing a deficit of £77k.

Officer's Appraisal

This proposal builds on work the Trust has previously funded at the Stroke Association and will go a long way to help rebuild many lives of

157
younger people devastated by a stroke. This request is to contribute towards the costs of the project delivery costs and the salary of the coordinator. Interestingly other funds are being raised by the former Australian Rugby Union captain, Michael Lynagh, who suffered a stroke in early 2012. In a high profile campaign, in partnership with colleagues from Sky TV, seven people including Michael himself will be running the 2013 London Marathon. Any grant should therefore be subject to confirmation that this endeavour (or others) has raised sufficient funds to make the project viable.

Recommendation

£80,850 over three years (£26,650; £27,300; £26,900) towards the costs of a back-to-work support programme for working age stroke survivors in London, subject to confirmation of the balance of funds required being secured from other sources.



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)

11487

Date Received:

20/11/2012

Programme
Area:

06

1. About your organisation

Name of organisation applying for grant: Stroke Association	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: 240 City Road London	
Postcode: EC1V 2PR	
Is this your home address? No	
Contact person: Mrs Natalie Prosser	Position: Senior Trusts Executive
Phone: 02075661519	Fax: 02074902686
E-mail: natalie.prosser@stroke.org.uk	
Website: http://www.stroke.org.uk	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 211015	
Date organisation established: 01/01/2002	

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) Project to increase the skills, opportunities and employment prospects for disabled stroke survivors who are of working age and live in Greater London.
How much funding is requested? Year 1: £26,644 Year 2: £27,324 Year 3: £26,887 Total: £80,855

3. Aims of your organisation

The Stroke Association is the leading charity taking action on stroke across the UK.

We want a world where there are fewer strokes and all those touched by stroke get the help they need.

Our mission is to prevent strokes, and reduce their effect through providing Life After Stroke services, campaigning, education and research.

4. Main activities of your organisation

We campaign across the UK to promote greater understanding of stroke and to improve stroke services. We work with politicians to influence stroke policy and how it is implemented, and support stroke survivors at a local level to have a voice to campaign for improvements in their local services.

We support people affected by stroke, by providing reliable information and advice, delivering a broad range of Life After Stroke support services, assisting with financial needs and supporting stroke clubs.

We invest in vital stroke research, by awarding grants to stroke researchers for specific projects, and by funding fellowships to enable doctors, nurses and allied health professionals to train for a career in stroke research.

We work in partnership with people affected by stroke, volunteers, other organisations and supporters, to raise awareness of stroke and improve services for stroke survivors and their carers.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
339	395	21	4,300

6. How do you support your volunteers?

Following a robust recruitment and approval process we match volunteers with roles that suit their skills & interest areas.

Role-specific training, flexible opportunities, volunteer conferences, a recognition programme and informal feedback ensure our volunteers are engaged and nurtured, often into long term supporters.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Until December 2017

8. Finance

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

Financial year ended:-

Month: 31st March

Year: 2012

Income received from:	£
Voluntary income	16,664,000
Activities for generating funds	177,000
Investment income	394,000
Income from charitable activities	12,253,000
Other sources	1,099,000
Total Incoming Resources	30,587,000

Expenditure:	£
Charitable activities	25,056,000
Governance costs	97,000
Cost of generating funds	7,357,000
Other	0
Total Resources Expended	32,510,000
Net (Deficit)/Surplus:	(1,923,000)
Other Recognised Gains/(Losses)	(283,000)
Net Movement in Funds	(2,206,000)

Asset position at year end	£
Fixed assets	2,762,000
Investments	16,288,000
Net current assets/(liabilities)	(654,000)
Long-term liabilities	(4,901,000)
*Total A	13,495,000

Reserves at year end	£
Unrestricted funds	11,802,000
Restricted funds	1,693,000
Endowment funds	0
*Total B	13,495,000

9. Statutory funding

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

10. Material changes

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

none

11. Previous applications to the Trust

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

Month/Year:	02/05	Ref:	6317	Grant received:	£74,000	OR application rejected?	No
Month/Year:	02/01	Ref:	1098	Grant received:	£62,000	OR application rejected?	No
Month/Year:		Ref:		Grant received:		OR application rejected?	

12. Previous funding received

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

	Year: 2009	Year: 2010	Year: 2011
(i) Leathersellers' Company Charitable Fund	1,000	0	0
The Grocers' Charity	3,000	0	0
(ii) 3 boroughs in 09/10 5 boroughs in 10/11 9 boroughs in 11/12	61,858.50	189,368.80	206,762.47
(iii) 4 in 09/10, 4 in 10/11 and 3 in 11/12	334,362.00	67,625.50	199,604.50
(iv) 295 PCTs (across the UK) over three years	402,229.50	259,004.30	408,377.97
(v)			
(vi) 7, including DOH Section 64 and BLF 4, including DOH Section 64 and BLF 4, including BLF	289,526	280,776	191,601

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
Thompson Family Charitable Trust	200,000	100,000
Donald Forrester Trust	0	250,000
Garfield Weston Foundation	150,000	0
Wolfson Foundation	0	150,000
Constance Travis Charitable Trust	10,000	100,000
Other Trust Income	842,300	706,000

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

As an organisation we 'reduce, reuse and recycle' as much as possible, and aim to keep travel between regional offices to a minimum. Some examples include the following:

1. We run video conferencing for meetings whenever possible to reduce travel.
2. If staff do need to travel, car sharing is encouraged.
3. Rechargeable batteries are used.
4. We recycle as much waste as possible. Recycling bins are used in all offices.
5. Stationary is reused as much as possible.
6. Mugs are used as opposed to plastic cups.
7. Double-sided printing and copying is used as appropriate.

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.

Stroke is a complex and long-lasting medical condition experienced by around 11,000 people in Greater London each year. Approximately 3,000 of these will be stroke survivors of working age (16-65) who are disabled because of their condition.

Stroke can be devastating, and the physical, social and emotional adaptations that stroke survivors and their families have to make in response to their condition, continue long after a person is clinically "better" and medical treatment has finished. Additionally, many younger stroke survivors find it physically and emotionally difficult to return to work after their stroke, which can affect family finances enormously.

Through working closely with stroke survivors in Greater London, we have identified a lack of support specifically for younger stroke survivors. In 2005 the City Bridge Trust generously funded the Stroke Association's 3-year Stroke Service for People of Working Age, which was a great success. However, at the time of the project's completion, the Government's new Stroke Strategy for England had recently been published and health reforms were taking place in London. The Stroke Association therefore decided to prioritise developing our own general strategy for our London region, before committing to any specific service provision. Our strategy was soon put in place, and our London team now provides 27 Borough-based Life After Stroke Services to stroke survivors of all ages. However, it is evident from learning the experiences of the stroke survivors who are using these services, that there is still a significant gap in support specifically for those who are of working age.

We want to employ an Employment Support Coordinator to deliver a project with four main objectives:

1. Provide a service aimed at younger stroke survivors in London, offering information, support and advice on a range of issues relating to living with their condition.
2. Develop and implement a 12-week modular support and training 'Back to Work' programme for younger disabled stroke survivors.
3. Develop a referral pathway by integrating the programme with local Stroke Association Life After Stroke Services and other relevant agencies.
4. Offer voluntary work placements within the Stroke Association and develop partnerships with London-based employers to provide both paid and voluntary work placements.

We anticipate that our project will directly benefit 80 people annually, with approximately 50 participating in the programme and the remainder receiving specific, tailored support and guidance. The project will also benefit many more people indirectly (families and carers, for example).

It is anticipated that around half of the programme beneficiaries will find themselves paid or voluntary work as a result of the support provided by this project.

We are the right organisation to deliver this project, as the Stroke Association has over 20 years' experience in supporting stroke survivors adapt to their lives after stroke. We are the only organisation that provides support to stroke survivors right across London, with services in 25 of the 33 Boroughs, and are therefore best placed to identify potential project beneficiaries.

User involvement is integral to all the Stroke Association's work. The experiences of the London Stroke Action Council (a group of people all affected by stroke), have helped to shape this project plan and will sit upon the reference group that will guide the project through its development phase.

Our project meets The City Bridge Trust's "Positive Transitions to Independent Living" priority. The project's aim is to create new opportunities for stroke survivors by increasing their skills, knowledge base and experience. We want to enable stroke survivors to adapt to their new disability, and to regain the confidence to return to work in order to become more emotionally and financially independent.

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

Beneficiaries will be supported by the Employment Support Coordinator in establishing personal goals, within the seven outcome themes in 'Our health, our care, our say':

- 1.Exercise choice and control
- 2.Improved health and wellbeing
- 3.Personal dignity and respect
- 4.Improved quality of life
- 5.Freedom from discrimination and harassment
- 6.Economic well-being
- 7.Making a positive contribution

Within these outcome themes, we will monitor the following specific project outcomes:
 Younger disabled stroke survivors reporting:

- 1.increased opportunities
- 2.increased independence
- 3.increased confidence
- 4.an improvement in adapting to their condition

Data will be recorded by the Coordinator using our database. With each participant, the Coordinator will monitor how participants' goals are being met, as the programme progresses and again when participants complete the programme.
 Participants will also be invited to provide feedback at the end of their involvement.
 The success of the project will be determined by participant numbers and the extent to which project outcomes are achieved.

17. Beneficiaries

How many people will benefit from the grant per year?
80 (direct beneficiaries)

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)
Hopefully stroke survivors of all Boroughs will benefit from this grant.

At what address will the activity be located?
Stroke Association Regional Office at London Bridge.

What age group will benefit? **Adult, 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

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Salary Costs	32,603	29,363	30,244	92,210
Employer's NI	3,180	3,180	3,180	9,540
Recruitment Costs	2,250	0	0	2,250
Computer Costs	2,300	0	0	2,300
Materials, printing, design	2,000	0	0	2,000
Programme Coordinator Travel	1,200	2,000	1,688	4,888
Room Rental	2,800	3,000	3,000	8,800
Participant Transport	5,500	6,000	6,000	17,500
Evaluation	0	515	600	1,115
Management Costs	7,500	7,000	7,500	22,000
HR Costs	900	0	0	900
IT Support	1,000	1,030	1,061	3,091
Employment Training to Stroke Association Staff	0	2,060	0	2,060
Volunteer Costs	500	500	500	1,500
TOTAL	61,733	54,648	53,773	170,154

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Barnet Local Authority	8,445			8,445
TOTAL	8,445			8,445

What other funders are currently considering the proposal?

Funder	£
Leathersellers' Company Charitable Fund	45,000
Michael Lynagh/ Sky	80,854
TOTAL	125,854

19. Funding requested from the Trust


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

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Contribution to overall project costs	26,644	27,324	26,887	80,855
TOTAL	26,644	27,324	26,887	80,855

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">01/04/2013</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? We will seek funding, either through a contribution from the CCGs associated with each of our London Life After Stroke services benefiting from the programme's operation, or from the DWP who commission services aimed at providing support to help disabled people back into work.
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>Natalie Prosser</u> _____ (your name)
am an authorised representative of <u>Stroke Association</u> _____ (your organisation)
within which I am <u>Senior Trusts Executive</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>20/11/12</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

MEETING: 18/04/2013

ANNEX NUMBER: 13

ASSESSMENT CATEGORY - Strengthening the Third Sector

CREATE London

Ref: 11547

Adv: Clare Thomas

Amount requested: £175,000

Base: City

Benefit: Several London boroughs

Purpose of grant request: Sourcing, skilling up and mentoring 1,000 local volunteers to support the delivery of events in the Olympic Park and a series of art commissions.

Background

CREATE London, a newly registered, independent arts charity, was set up in 2008 as a project of East London Business Alliance (ELBA). CREATE is also a social enterprise, providing a programme of high-level, creative and cultural projects which contribute to long-term social and economic regeneration outcomes across East London. Through commissioning major projects, it attracts new audiences from the most deprived parts of the UK. The programme is underpinned by CREATE Jobs, which provides mentoring, support and paid employment opportunities for local young people.

Funding History

None.

Current Application

This application builds on highly successful arts activities for volunteers which formed a major part of the Cultural Olympiad in East London. The programme's principal objective is to secure a cultural legacy from the Games for the Host Olympic Boroughs. CREATE will build up a team of community volunteers and will provide them with medium to long-term opportunities. As well as improving the wellbeing of the individual volunteers and increasing their employability, the initiative will bring benefits to the wider community. The project will engage inspirational Gamesmakers and Team London Ambassadors from the Games, to help build the legacy and update the new volunteers' skills. The Gamesmakers and Team London Ambassadors will provide a comprehensive support package comprising: team-building; confidence-building and personal and social skills; problem-solving; and leadership opportunities. A good proportion of the volunteers will be involved in a unique, spectacular, weekend event on the first anniversary of the London 2012 Opening Ceremony. This arts and sports event will take place in the Queen Elizabeth Olympic Park. Working closely with the London Legacy Development Company and the Barbican Centre, the event aims to bring

back the spirit of the Games and their "feel good" factor. However, the programme of volunteering will run throughout a year-long programme across of a range of commissioned projects.

Financial Observations

CREATE was established in 2008 with assistance from the East London Business Alliance (ELBA), a registered charity, and was initially governed by several host London Boroughs, particularly the London Borough of Hackney (LBH) which ran CREATE's finances, received grants and made payments. On 22nd February 2012 CREATE became a registered charity and a separate entity and has been operating as such since that time. An extract of LBH's accounts for the year ended 31st March 2012 has been provided which show income and expenditure relating to CREATE and this information is shown at Question 8 on the application form. A balanced position was achieved for the year with income of £801,000 equal to expenditure. At 31st March 2012 CREATE did not hold any reserve funds.

A forecast for the current year ending 31st March 2013 was provided on 21st March 2013 and this shows income of £1,802,705 and expenditure of £1,699,172, leading to an overall surplus of £103,533. This comprises surpluses of £22,555 on unrestricted activity and £80,978 on restricted funds. The £22,555 represents CREATE'S anticipated holding of unrestricted free reserves as at 31st March 2013. This compares to a draft reserves policy which requires that 6 months' worth of staff costs be held, amounting to £126,152. This policy will be presented to CREATE'S Board for approval in June this year.

The budget for the year commencing 1st April 2013 shows a surplus of £92,656, all relating to unrestricted activity. This is based on income of £850,978, which CREATE has advised is all secured. Unrestricted free reserves at 31st March 2014 are forecast to be approximately £115,000, which is marginally short of the target to hold £126,152.

Consultees

The Barbican Centre, which accommodates CREATE (who are now Barbican Associates), is the partner jointly responsible for delivering the Anniversary event of the London 2012 Opening Ceremony. Their Director of Creative Learning commented as follows: *The Arts, Audiences and Learning divisions of the Barbican are working increasingly closely with CREATE in the planning, communicating and delivery of projects and events across its neighbouring East London boroughs. Both organisations are committed to ensuring a positive and sustained legacy from the Olympics in 2012 for the communities of East London and believe that a good part of this can be achieved through working in partnership. A recent example of this collaborative working is the launching of Open School East in summer 2013, which will be a Free Art School situated with artist studios on the De Beauvoir estate, set up primarily to work in*

partnership with local organisations and engage the local community in a range of participatory activities.

Officer's Appraisal

Whilst CREATE is a newly established charity, in its first year of operating independently of ELBA, it has a 5-year track record of delivering arts commissions in East London. ELBA will continue to provide financial 'back office' services, including the preparation of management accounts. CREATE has secured the backing of several large businesses, statutory funding and various commissions; and has already raised over £850,978 towards the first year's running costs. You are asked to support the volunteering costs of its programme, with a 3-year grant amounting to £175,000. As CREATE has yet to test whether the 'Legacy' enthusiasm will continue after the first Anniversary of the London Games, it is advised to consider a grant of £75,000 for the first year's operation only. Further grants, if requested, would be conditional on a satisfactory monitoring and evaluation report at the end of the first year.

Recommendation

£75,000 towards the volunteering costs of supporting CREATE's involvement in arts activities in Queen Elizabeth Park and other commissions in East London.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11547

Date Received:

07/12/2012

Programme
Area:

07

1. About your organisation

Name of organisation applying for grant: CREATE London	
If the organisation is part of a larger organisation, what is its name? East London Business Alliance (Accounts)	
Address for correspondence: c/o Barbican Centre Silk Street London	
Postcode: EC2Y 8DS Is this your home address? No	
Contact person: Ms. Hazel Durrant	Position: Head of Development
Phone: 020 7382 7284	Fax:
E-mail: hazel@createlondon.org	
Website: http://www.createlondon.org	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1146063	
Date organisation established: 01/04/2012	

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) Sourcing, skilling up and mentoring 1,000 local volunteers to support the delivery of events in the Olympic Park and a series of art commissions.
How much funding is requested? Year 1: £75,000 Year 2: £50,000 Year 3: £50,000 Total: £175,000

3. Aims of your organisation

CREATE is a social enterprise committed to delivering groundbreaking, multi-disciplinary art projects that offer new perspectives on our daily lives.

We bring art out of traditional spaces and into east London's parks, playgrounds, rooftops and tucked-away places. We commission and produce work by emerging local artists and established international figures, and bring our younger residents behind the scenes with a programme of workshops, skills development, volunteering and job placements.

Our conviction is in the power of art to offer new perspectives on community life, provoking healthy debate and encouraging constructive change and social progress. In a part of London with the highest concentration of artists and creative businesses in Europe, but with some of the lowest levels of cultural engagement, we work to bridge traditional divides of class, education and social background with art that is ambitious, exciting and joyful.

4. Main activities of your organisation

All of our projects and commissions have at their core socially engaging art practice that looks at how creative communities can relate to their neighbourhood and contribute to urban renewal.

The 2013 Programme consists of 10 projects including:

- The social engagement of local communities with a large-scale event to mark the reopening of the North Olympic Park
- An architectural practice building a community hub and carpentry workshop
- A digital commission to reach and involve young people and mass audiences
- A Free Art School for MA Fine Art students placed within the heart of a community
- An artist-in-residence working with 200 residents
- Providing 500 internships, placements and sessional work opportunities for young people who usually face barriers to obtaining jobs in the arts
- A digital interactive project that explores connections between the growing digital community in east London and local communities
- A health and wellbeing art commission working with communities that have some of the lowest health and wellbeing indicators in London

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4	2	8	2,600

6. How do you support your volunteers?

The volunteers will be given expenses: volunteer expenses covering food and travel; they will have a volunteer co-ordinator and enjoy the same rights as paid staff.

We also look to provide exit strategies and/or further skills training or job opportunities.

7. Property occupied by your organisation

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

8. Finance

Audited accounts are not available for CREATE as the current year to 31st March 2013 is the organisation's first year of operation as a charity. The London Borough of Hackney previously managed the finances of CREATE and an extract of their accounts which relate to CREATE is presented below for the year ended 31st March 2012.

Financial year ended -

Month: **March**

Year: **2012**

Income received from:	£
Voluntary income	801,000
Activities for generating funds	
Investment income	
Income from charitable activities	
Other sources	
Total Incoming Resources	801,000

Expenditure:	£
Charitable activities	801,000
Governance costs	
Cost of generating funds	
Other	
Total Resources Expended	801,000
Net (Deficit)/Surplus:	0
Other Recognised Gains/(Losses)	
Net Movement in Funds	801,000

Asset position at year end	£
Fixed assets	
Investments	
Net current assets/(liabilities)	
Long-term liabilities	
*Total A	0

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

9. Statutory funding

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

10. Material changes

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

CREATE originated in 2008. It gained independence from the Host Boroughs in 2011. A limited company was formed, and in early 2012 CREATE became a charity and started 'trading' in April 2012. ELBA, a charity, has capacity built CREATE since 2007, was the TUPE recipient for CREATE and manages its accounts. Since 2010 ELBA has received charitable funds and been the guarantor on its behalf.

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: 2010	Year: 2011	Year: 2012
(i)	0	0	0
(ii)	0	150,000	150,000
(iii)	0	0	0
(iv)	0	0	0
(v)			
(vi)	0	412,062	396,145

13. Previous grants received

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

	Year: 2011	Year: 2012
CREATE registered as a charity in March 2012	0	0

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

- Focus on local art commissions and thus a reduction in car use and air travel
- Use of recycled paper
- Buying environmentally friendly cleaning products and more sustainable food products e.g. Fair-trade beverages
- Turning lights off in well lit rooms and when leaving the office
- Seeking to buy energy efficient electrical items
- Turning on electrical items only when necessary
- Turning off monitors when leaving desks for long periods
- Boiling only enough water for requirements
- Keeping waste items to a minimum, particularly paper which should be reduced, reused and recycled
- Single-sided print-outs should be re-used for note paper
- Recycling boxes placed in the office
- All packaging, tin cans, plastic and to be recycled in bins provided
- Toner cartridges are recycled/refilled
- Staff are encouraged to use low-impact methods of travelling, such as public transport, cycling and walking. Car sharing is encouraged.

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.

After building a reputation for developing laudable models to achieve meaningful social engagement through the arts, we are now taking this work forward to allow for greater impact for our future programmes. We will now run projects, which deliver community engagement and participation outcomes from the development process through to project completion. All of our projects in 2013 will be supported by a significant level of research and evaluation working in partnership with reputable academic institutions. Our core mission is to produce work aimed at engaging local communities in transformational, long-term and meaningful ways. For such commissions, which will take place in the Olympic Park and around the Host Boroughs, we want to build up a team of community volunteers to deliver and add value to what we deliver.

There will be a series of volunteering opportunities which will support our commissions and allow them to be fully realised and/or serve as a way of supporting communities and beneficiaries to engage meaningfully and in depth with artistic and creative activities that changes their communities for the better.

The projects will engage Gamesmakers and Team London Ambassadors from the Games and will look to build on the skills and legacy Games experience of local volunteers in the following ways:

- Provide medium to long-term volunteering opportunities to build communities and to ensure legacy outcomes regarding employability skills
- Pass on practical skills building and painting physical structures e.g. as with previous projects such as Barking Bathhouse and Folly for a Flyover
- Work with those who manage local community spaces and events so they develop skills to make their areas a better place to live
- Allowing local people to meet, work and engage with their neighbours or communities outside of their own niches or networks

How it will work

There would be workshops where we will work with those who have provided the framework and infrastructure for Games-time volunteering and use them to inspire and recruit volunteers. Veteran Gamesmakers and Team London volunteers, from the Host Boroughs, would act as role models and give a view as to why they volunteered; what it brought to them personally, and skills-wise, and how the experience instilled good citizenship values.

ELBA has been a long-time supporter of CREATE and, working with them and their corporate members, we will provide a comprehensive support package for community volunteer beneficiaries e.g.:

- Icebreakers for team building
- Confidence building skills for personal development
- Finding your voice: delegation
- Working as a team: cooperation and negotiation
- Asking for help: problem solving and understanding the strength of the team
- Leadership with responsibility: efficiency under pressure

There will be flexibility in terms of delivery i.e. sessions at the schools, colleges, community venues/hubs, tenant associations and at or near the Olympic Park or landmark venues in the Host Boroughs.

Local Gamesmakers and GLA Team London Ambassadors will provide a support package covering:

- Team spirit
- Customer/Visitor experience
- Unpaid but valued
- An experience money cannot buy
- A gateway to jobs

Framework for success

- There would be a clear timeline to get volunteers ready for action
- We would work with statutory and other providers to secure public-facing experiences prior to staff volunteering during in the summer. Thus ensuring people understood the pressure, demands and challenges of the job
- We will provide expenses
- Uniform
- Volunteer celebration event

We will have a volunteer coordinator to aid delivery and will work with our Partners ELBA throughout the year to ensure continuity of service and a high quality experience.

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

We will develop a specific project plan with timelines, milestones, outputs and outcomes and such targets/KPIs will be reviewed quarterly so that provision improves over the lifetime of the project.

All of our work will be evaluated annually using a combination of focus groups and questionnaires. We also carry out regular reporting to bodies such as the Arts Council and Legacy Trust UK, as well as the CREATE board.

There will be live feeds via the website and in 'real time' using our Facebook and Twitter pages.

We will build in a research element to measure impact across all the commissions and will do this in conjunction with London Universities that are part of the London Creative and Digital Fusion programme. Lessons learnt from the project evaluations will feed into the future development of our commissions and how we involve local communities in delivering and benefitting from our work.

17. Beneficiaries

How many people will benefit from the grant per year?
70,000

In which local authority is your organisation based?
City

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Hackney; Newham; Tower Hamlets; Waltham Forest; Barking and Dagenham; Greenwich

At what address will the activity be located?
In various locations within these boroughs: Hackney, Newham, Tower Hamlets, Waltham Forest, Barking and Dagenham, Greenwich and a landmark event in the Olympic Park.

What age group will benefit? **All**

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

	%		%
White - British	40	Black - Caribbean	2
White - Irish	1	Black - African	12
White - Other (please describe) Eastern European, Turkish, Kurdish	5	Black - Other (please describe)	
Asian - Indian	2	Black - British	12
Asian - Pakistani	4	Chinese	1
Asian - Bangladeshi	12		
Asian - Other (please describe) Vietnamese	2	Other (please describe) Mixed Race	7
			Open to everyone

What proportion of the beneficiaries will be disabled people?
10%

18. Funding required for the project

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

(List main expenditure headings and amounts)

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
CREATE Programme 2012	790,000	665,000	800,000	2,255,000
Volunteering	75,000	50,000	50,000	175,000
Core operation	250,000	260,000	270,000	780,000
Research and Development	30,000	25,000	20,000	75,000
TOTAL	1,145,000	1,000,000	1,140,000	3,285,000

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Private, Companies (CSR)	490,000	90,000	90,000	670,000
Trusts and Foundations	0	0	0	0
Statutory Sources	470,000	300,000	0	770,000
Commissioning partners	100,000	0	0	100,000
TOTAL	1,060,000	390,000	90,000	1,540,000

What other funders are currently considering the proposal?

Funder	£
Bloomberg, Deutsche Bank, Canary Wharf Group	375,000
Arts Council England	100,000
LLDC	50,000
TOTAL	525,000

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 £
Volunteering	75,000	50,000	50,000	175,000
TOTAL	75,000	50,000	50,000	175,000

20. Funding requested from the Trust (continued)

When will the funding be required?

17/03/2013

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

If so, how will it be resourced?

We will work with local authorities, the GLA, CVS DWP to develop longer-term programmes having proved the value of our three-year programme. We would expect the economic climate to have improved and the timing would coincide with the full reopening of the Olympic Park, for which a huge human resource would be needed.

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

We have been invited to work on the animation and curation of the Olympic Park by London Legacy Development Company and we will work on the delivery the arts provision for the park with our partner, The Barbican. All planning consents are with the LLDC, which is chaired by the Mayor of London.

Declaration on behalf of applicant organisation

I, HAZEL DURRANT (your name)

am an authorised representative of

CREATE LONDON (your organisation)

within which I am HEAD OF DEVELOPMENT (your position)

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

Signature H Durrant Date 11/12/12

Return the completed form to: The City Bridge Trust

City of London
PO Box 270
Guildhall
London EC2P 2EJ

Please

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- **do use the correct postage** - the completed form and additional materials are likely to exceed 100g in weight

MEETING: 18/04/2013

ANNEX NUMBER: 14

ASSESSMENT CATEGORY - Strengthening the Third Sector

Pilotlight

Amount requested: £50,925

Ref: 11316
Adv: Ciaran Rafferty
Base: Camden
Benefit: Hillingdon,
Lambeth, Lewisham,
Southwark

Purpose of grant request: 'Pilotlight Local' - for London roll-out and replication. Programme builds locally supportive bridges between voluntary sector, businesses and local authorities.

Background

Pilotlight, was set up in 1996 by Jane Tewson, the founder of Comic Relief. It endeavours to strengthen the Voluntary and Community Sector by introducing to it leaders from the business world who volunteer their business skills to help sustain charitable work. The basic premise is that charities, especially the smaller ones, are often so pre-occupied with frontline service delivery that building organisational capability and sustainability is neglected. Many need help with business planning, marketing, evaluation, governance, personnel and other legal and fiscal requirements and so Pilotlight will enable and support relationships between corporate-sector professionals with such skills and the groups which might need them.

Funding History

The charity has received two grants previously. The first, for £22,860, was awarded in January 2004 and was to support its work in recruiting and supporting volunteers. The second grant, in March 2008, was for £52,500 for three years' support of work helping charities to evaluate their impact. Both grants were satisfactorily monitored.

Current Application

This application is to support the roll-out of a new venture called *Pilotlight Local*. Whereas the "standard" – and successful – scheme matches teams of senior business people (Pilotlighters) as coaches for individual charities Pilotlight Local also incorporates businesses within the charity's local community and the local authority, in a cohesive triangular arrangement.

The core model is the same in that a team of 4 Pilotlighters will be assigned to a charity or social enterprise (eligibility is restricted to those organisations with turnover of less than £3m). Together, over the course of a year, they will work to produce a bespoke business plan for the charity, developing and embedding business/management skills in the

process. In addition, under Pilotlight Local, there will also be a series of workshops devised to bring groups together for mutual training in resource sharing, for example, or in revenue generation techniques (focusing on private and public sector bidding). The third workshop programme will link the organisations to their local businesses at a point where the groups will have gained sufficient competency to work to a strategic plan with potential, local, supporters. It is this development of local networks which distinguishes the Local scheme from the standard format and which, it is hoped, will go further make the organisations more sustainable. Pilotlight Local has been successfully trialled in other areas of London leading to this application to support its roll-out into four other boroughs.

Financial Observations

The organisation has presented audited accounts for the year ending 31st December 2011 and these show a deficit of £20,003 (1.6% of turnover). The accounts record that the charity does not hold any unrestricted free reserves and that they are in a negative position amounting to £41,926. This compares to a reserves policy target to hold 3 months' worth of staff costs which the charity calculates as being £213,000.

Draft accounts for the year ended 31st December 2012 show an overall surplus of £163,453, with £33,923 relating to unrestricted activity and the balance of £129,530 being the net receipt of restricted funds. These results improve the unrestricted free reserves position but it still remains a negative £7,442.

The budget for the current year to 31 December 2013 predicts an overall surplus of £36,901, comprising a surplus on unrestricted activity of £101,601 and a net deficit on restricted funds of £64,700. If this budget proves to be realistic then unrestricted free reserves should turn positive with a holding of approximately £94,000, which equates to just under half of the charity's reserves policy target.

Overall, projections show an improving position but it is recommended that any grant be subject to sight of audited and satisfactory accounts for 2012, which are likely to be available at the end of May this year. It is also suggested that an updated forecast for the current year 2013 is provided at the same time.

Officer's Appraisal

The general Pilotlight model has operated successfully for a number of years. Pilotlight Local will bring a new dimension in that it will provide the same, high-quality, professional support but in the context of an organisation's own community. Linking the group much more strongly to its local authority and to local businesses will help their work be seen and valued and, hopefully, will lead to it being more sustainable over the longer term. A grant, if awarded, will help Pilotlight continually evaluate

and fine-tune the project throughout its implementation in four London Boroughs.

Recommendation

£51,000 over two years (2 x £25,500) towards the costs of implementing and evaluating Pilotlight Local in four London boroughs. The grant is subject to receipt of audited and satisfactory 2012 accounts and an updated forecast for the current year 2013.



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)

11316

Date Received:

26.07.12

Programme
Area:

7

1. About your organisation

Name of organisation applying for grant: Pilotlight	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence 15 - 17 Lincoln's Inn Fields, London (group home address of the organisation; see below)	
Postcode: WC2A 3ED Is this your home address? Yes	
Contact person: Ms Mary Loxley	Position: Development Officer
Phone: 0207 396 7414	Fax: 0207 396 7414
E-mail: mloxley@pilotlight.org.uk	
Website: www.pilotlight.org.uk	
Legal status of organisation: Registered Charity and Company Limited by Guarantee	
If registered, please give charity number: Registered Charity 1059660	
Year and month organisation established: Charity registered Dec 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) 'Pilotlight Local' - for London roll-out and replication. Programme builds locally supportive bridges between voluntary sector, businesses, and local authorities for charities' sustainability.
How much funding is requested? Year 1: £25,462 Year 2: £25,462 Year 3: £0 Total: £50,925

3. Aims of your organisation

Pilotlight's central mission is to enable small, ambitious charities to become more effective, so that they can directly help more service-users in areas of significant need and to alleviate disadvantage. We aim to bring about measurable, long-term change through volunteer business mentoring and learning & evaluation. Through this facilitation method, we bridge skills gaps in charities and bring together the passion and expertise of the voluntary/charitable sector with the best of business thinking to help create more effective and sustainable small charitable organisations; and bring about measurable, long-term, change through mentoring and learning and evaluation. Pilotlight works only with small charities and social enterprises, because we believe that they are best placed to find innovative and effective solutions to the changing needs of the disadvantaged in their communities. And, especially in the current financial climate, a primary objective of any small community or voluntary organisation should be to make themselves sustainable.

4. Main activities of your organisation

The Pilotlight process works by our managing carefully selected teams of senior business people ('Pilotlighters') as coaches for individual charities with specific needs. Following an initial organisational analysis of need, each Pilotlight process starts by facilitating a team of business mentor volunteers to work with a chosen charity's organisational structure – largely by coaching the senior operational personnel on previously identified topics. In this way, and with a Pilotlight Project Manager guiding the process, we work with the charities on defined projects to increase and strengthen levels of relevant key strategic-thinking skills – analysis and planning; fundraising and financial management; staff and trustee performance; communications; measurement. The model works at grass-roots level: via regular meetings with a team of four Pilotlighters, and with the personnel representing some charities being very much user-led. The project-period that we use for each Pilotlight project is approximately 12 months, and accommodates an average of 11 meetings. Each individual process is then followed by a project evaluation carried out by our Evaluation Manager, and which is on-going and informs all of our future work. Pilotlight works in England, Scotland, and Wales, and currently with 75 charities in need.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
18	5	13	326

6. How do you support your volunteers?

The volunteer number given above corresponds to the number of volunteer Pilotlighters we work with. Support is given in each Pilotlight engagement, volunteers attend events, and are interviewed and inducted with us at initial approach stage.

7. Property occupied by your organisation

Is the main property owned or leased/rented by your organisation?	If leased/rented, how long is the outstanding lease/rental agreement?
Rented	Lease has 4 years to run.

8. Finance

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

Financial year ended -

Month: December

Year: 2011

Income received from:	£
Voluntary income	702,698
Activities for generating funds	0
Investment income	0
Income from charitable activities	576,682
Other sources	0
Total Income	1,279,380

Expenditure:	£
Charitable activities	1,188,211
Governance costs	5,650
Cost of generating funds	105,522
Other	0
Total Expenditure	1,299,383
(Deficit)/surplus for the year:	(20,003)

Asset position at year end	£
Fixed assets	4,431
Investments	0
Net current assets	(39,843)
Long-term liabilities	0
*Total A	(35,502)

Reserves at year end	£
Endowment funds	0
Restricted funds	2,083
Unrestricted funds	(37,585)
*Total B	(35,502)

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

9. Statutory funding

For the financial year above, what % of your income was from statutory sources?
0%

10. Material changes

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

Re. reserves and deferred income: Our Trustees recently decided to adopt an accounting method which spreads our corporate subscription/membership income, like grant income, throughout the year. Given the strictness of this new discipline, we are working successfully towards positive reserves. But, in the meantime, we are cash-rich. However, this whole issue is quite detailed, and I am very happy to answer any of your questions.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:						<input checked="" type="checkbox"/>
Month/Year: Mar	/	2008	Ref: 8555	Grant received: £52,500	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>
Month/Year: -	/	-	Ref:	Grant received: £	OR application rejected	<input type="checkbox"/>

12. Previous funding received

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

	Year: 2009	Year: 2010	Year: 2011
(i)			
(ii)			
(iii)			
(iv)			
(v) Scottish Executive		15,000	
(vi)			

13. Previous grants received

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

	Year: 2010	Year: 2011
Waterloo Foundation	15,000	15,000
Mercers' Charitable Trust	5,000	
St James's Place Foundation	11,424	
MacRobert Trust	10,000	
Gannochy Trust	14,521	
Wates Foundation & John Ellerman		10k & 25k

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

Our two offices in London, and also our office in Edinburgh, are based in office complexes with strong energy-saving principles.

Each office operates re-cycling functions for paper and consumables (plastic, glass, printer toner cartridges etc). In addition, staff are advised to print emails only when necessary, to use double-sided printing wherever possible, and to switch off computers and equipment at the end of each day.

Finally, and relevant to those staff that travel for Pilotlight engagements, and between our Edinburgh and London offices, it is our policy to use trains for business rather than air travel.

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.

Pilotlight has witnessed how the on-going economic situation has fundamentally impacted traditional support structures of the voluntary/charitable sector and, with our remit, has chosen to respond to this circumstance with a new variation on our existing model. 'Pilotlight Local' particularly equips small ambitious charities (three in each participatory borough) for survival in - and with - their localities, to enable them to help an increased number of service-users more effectively, and to adapt to the present funding and support environment. This variation is achieved with input in the Pilotlight process from local national business (ie. major firms which are based in a locality, but whose operations are not local, or exist beyond the local), and with Local Authority engagement - and so creating long-lasting connections with them. We have an initial Pilotlight Local programme currently in operation in Hillingdon, and actions also underway to replicate the pilot in Southwark, Lambeth, and Lewisham. The subject of this application is Pilotlight Local as it will operate in these four boroughs - but also to use the learning acquired during this process to replicate our model across the capital (and beyond).

Pilotlight Local works as a cohesive triangular arrangement. In this way, it builds bridges and connections with the local community, and has benefits for all the different entities/groupings involved. As per our standard operation and targets described in Section 4 above, we have a year's engagement with each charity as it works with a team of four Pilotlighters and which, ostensibly, leads to the achievement of writing a business plan and, through this, the skills and tools to run a business-like operation. As Pilotlight Local 'additional', we also hold a series of workshops devised to bring the different participants in the process together. The first workshop is held after three months and brings together all three charities for knowledge and resource sharing potential; the second is held after six months and is a revenue generation workshop focusing on private and public sector bidding and with commissioners present; and, after nine months, the third looks at introducing charities to more local businesses and at the point at which the charities will have gained sufficient competency to work to a strategic plan with potential supporters. In addition, the charity-sharing workshop is repeated during the process to consolidate sector learning and sharing.

In preparation for our development work with the four try-out boroughs, we had initial meetings with the local CVS, local authorities, and local national businesses; and our Evaluation Manager also carried out baseline measurement on existing levels of connections within the community. We believe that we are best placed to deliver the specific Local model on the basis of our existing successes in targeting effectiveness and capacity issues with small charities and social enterprises - and, especially, with the research, development, and activity we are undertaking in Hillingdon. We also have a strong track-record in accessing and retaining top-quality business talent for servicing the standard Pilotlight process. And, specifically for Pilotlight Local, we have built up connections relevant to all participants in the initiative (local businesses, Local Authorities, CVS etc). In summary, and to give three measurable outputs existing with outcomes, Pilotlight Local achieves:

- For charities and social enterprises - the gaining of specific skills, increased capacities, and local connections to meet the needs of local communities and service users; enabling voluntary sector growth and survival in the current climate, back-room sharing and even joint bidding.
- For Local Authorities - the facilitation of relationships with the local voluntary sector (and which is then better skilled, and more competent, as a deliverer through the commissioning/bidding process); confidence in Pilotlight's successful process as charities engage with Local Authorities.
- For local/local national businesses - improving corporate and employee engagement by the exercising of skills/knowledge sharing with their local community; on-going corporate involvement.

Funding request is Learning & Evaluation staff costs (£38,925), and for workshops (£12,000).

Applicable to size of grant request, see also attached organisational evaluation/support documents.*

* on file

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

As indicated throughout this application, a comprehensive evaluation process is intrinsic to Pilotlight's remit. We employ a dedicated Evaluation Manager who works on all our programmes with pre and post process assessment and measurement - and we also produce an annual formal evaluation report documenting the impact of our work, and the learning to be gained from it. In overall respect of Pilotlight Local, whilst some elements of success may be determinable within the relatively short-term (18 months), the true success of the joint-working initiative lies in the long-term results achieved by the the charities and for the benefit of their communities. Pilotlight will be tasked with ensuring that the charities have the skills, expertise, and local business/funding support to continue their work once the Pilotlight partners have withdrawn. The longterm aim is, thus, to bring about sustainable improvements that will continue to make a measurable impact locally. To this end, Pilotlight will seek to carry out an annual evaluation of each charity/social enterprise for at least five years after the completion of the project - and to inform replication and roll-out of the model across London boroughs and further afield.

17. Beneficiaries

How many people will benefit from the grant per year? **c. 2,500 helped in Hillingdon. Up to this maximum per borough expected elsewhere.**

In which local authority is your organisation based?
Camden and City of London (we have two Pilotlight offices in London)

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Hillingdon, Lambeth, Lewisham, Southwark. Pilotlight Local aims to work equally with each borough.

At what address will the activity be located? **The programmes works within each locality; but administered centrally.**

What age group will benefit? **All**

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			YES

What proportion of the beneficiaries will be disabled people?
Pilotlight responds to a range of charities and works widely with communities addressing social welfare, access, and exclusion concerns.

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 £
Core Staff Costs for delivery of Local	23,250	23,250		46,500
Workshops	6,000	6,000		12,000
Pilotlighting charity costs	84,000	84,000		168,000
Publicity	3,000	3,000		6,000
Local Authority bursary place	12,000	12,000		24,000
Learning & Evaluation process, & includes writing Process Manual	13,650	13,650		27,300
TOTAL	141,900	141,900		283,800

What income has already been raised?

(List amounts and main sources)

Source	Year 1 £	Year 2 £	Year 3 £	Total £
£120,000 achieved in partnership funding through Membership contributions to our working with charities in process	60,000	60,000		120,000
TOTAL				

What other funders are currently considering the proposal?

Freemasons' Grand Charity have been approached to fund the Pilotlight Local element of our Head of Programme Development position. We will have a decision from them by Autumn 2012.

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 £
Learning & Evaluation (as shown above)	13,650	13,650		27,300
Learning & Evaluation (core staff costs)	5,812	5,812		11,625
Workshops	6,000	6,000		12,000
TOTAL	25,462	25,463		50,925

20. Funding requested from the Trust (continued)

When will the funding be required? **We would be able to use the funds as soon as they might become available.**

Is the activity to continue beyond the period for which funding is requested?
If so, how will it be resourced? **The four initial boroughs for Pilotlight Local will lead to our extending the process elsewhere. In terms of finance, our Pilotlighters make a donation towards the cost of managing their time and, thus, the running of our programmes; and we operate with approx 75% of our costs covered by these business-membership contributions and that of our Associates. The remaining income is derived from grants.**

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, **Mary Loxley** (your name)

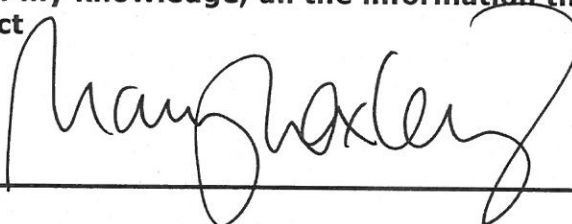
am an authorised representative of

Pilotlight (your organisation)

within which I am **Development Officer** (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

- **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

MEETING: 18/04/2013

ANNEX NUMBER: 15

ASSESSMENT CATEGORY - Strengthening the Third Sector

Heart of the City

Ref: 11640

Adv: Jenny Field

Amount requested: £108,640

Base: City

Benefit: Several London boroughs

Purpose of grant request: To extend the funding of our City fringes Newcomers Programme in order to give us the flexibility to build a sustainable, self-funding model. Y2 includes provision for final research report on impact.

Background

Members will be familiar with Heart of the City (HotC). Established in the early 2000s, it was the brainchild of the late Lord Eddie George, when Governor of the Bank of England, together with the then Lord Mayor and the Chairman of the Financial Services Authority, Howard Davies. HotC works to encourage City businesses to extend their corporate social responsibilities and to "put something back" into the surrounding community. It aims to enable businesses in the City and adjoining boroughs to learn from one another to create prosperous, healthy and sustainable communities through the development of socially responsible programmes.

It should be stated at the outset that whilst HotC has close links with the City Corporation, it is a wholly independent registered charity and a company limited by guarantee, with its own board of governors and advisory council. Only one of the ten trustees is a Corporation nominee and only two of the 25 members of the advisory council are Corporation representatives.

HotC's activities include its Newcomers Programme, an 18-month programme that encourages businesses new to Corporate Social Responsibility (CSR) to develop and implement CSR programmes. Businesses that complete this programme are then invited to join its Alumni Programme upon 'graduation'. There are currently over 600 businesses in its network, including more than 450 Alumni businesses.

Funding History

In September 2009, you awarded a grant of £157,500 over three years towards the salary and associated running costs of a Project Manager, leading its Newcomers Programme. This grant is due to end in June 2013 and you are now asked to fund the post for a further two years.

Current Application

Over the next two years, HotC will aim to recruit 50 new businesses to engage with its 18-month CSR programme, through its recruitment breakfasts that attract approximately 200 Chief Executives. All of those joining the programme will receive tailored, personalised support from the Project Manager. HotC Newcomers are linked up with businesses that have existing CSR policies (HotC's "Contributors") in order to share best practice. By helping businesses to develop quality CSR programmes, HotC enables voluntary organisations and local communities within the City fringe boroughs to harness the expertise of their local business community.

During 2011/12, Deloitte LLP undertook a strategic review of the quality of the programme. 97% of HotC's business members would recommend its services to clients or colleagues; 95% rated HotC's workshops as 'good' to 'excellent' and 90% rated HotC's CSR toolkits as 'good' to 'excellent'.

Financial Observations

Audited accounts for the year ended 31st March 2012 show a surplus of £64,486 (10.4% of turnover). The income and expenditure figures include contributions in kind valued at £355,468. This relates primarily to the time spent by HotC's business supporters in assisting with programme promotion and delivery. It also includes £61,485 worth of governance costs, including costs associated with trustees meetings, auditor's fees and additional time given by HotC's trustees, over and above the quarterly Board meetings.

The charity's reserves policy, as set out in its 2011/12 annual report, does not state a specific amount to be held though it notes that reserves are to be held for wind-down purposes. During the assessment meeting it was explained that the Board has agreed that it requires a reserve of three months' operating costs which it calculates to be £90,000. As at 31st March 2012, unrestricted free reserves totalled £128,036, an excess of £38,036 above the required holding. A recent forecast for the current year to 31st March 2013 shows a further surplus of £84,500.

During 2013/14, HotC plans to utilise some of its free reserves for additional activities, including the engagement of an Events and Communications Manager to help it develop its Alumni programme over the coming year.

Officer's Appraisal

Whilst three years is the maximum period that you will usually fund a project or activity, your current policies allow you to consider funding for a further two years, work which is of particular strategic importance to London. Given HotC's unique position as a bridge between businesses and

the local communities where they are based, officers are of the view that the work of HotC meets this criterion.

The Newcomers programme has been dependent on grant funding since its inception. In order to become more sustainable HotC plans to introduce a paid-for service for its Alumni Programme over the next two years which will then be used to subsidise the Newcomers programme.

Monitoring of the grant currently held has been of a high standard. A final report will be due when the current grant ends in June. If you approve a grant today it is, therefore, recommended that it be conditional upon receipt of a satisfactory final monitoring report.

Recommendation

£108,000 over two years (£51,000; £57,000) towards the full-time salary and associated running costs of a Project Manager.



The City Bridge Trust

Charity Registration Number: 1035628

Working with Londoners: Application for a grant

Please read the guidance notes before completing this form

Reference:
(office use only)

11640

Date Received:

4.2.13

Programme
Area: 7

1. About your organisation

Name of organisation applying for grant:

Heart of the City

If the organisation is part of a larger organisation, what is its name?

None but hosted by City of London Corporation

Address for correspondence

Guildhall, PO Box 270, London

RECEIVED
The City Bridge Trust

04 FEB 2013

Box

Postcode: **EC2P 2EJ**

Is this your home address? **No**

Contact person:

Ms Carolyn Housman

Position:

Director

Phone: **02073323745**

Fax:

E-mail: **carolyn.housman@cityoflondon.gov.uk**

Website: **www.theheartofthecity.com**

Legal status of organisation: **charity**

If registered, please give charity number: **1117212**

Year and month organisation established: **December 2006**

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)

To extend the funding of our City fringes Newcomers Programme in order to give us the flexibility to build a sustainable, self-funding model. Y2 includes provision for final research report on impact.

How much funding is requested?

Year 1: £51,227 Year 2: £57,413 Year 3: £

Total: £108,640

3. Aims of your organisation

Heart of the City's Mission is to enable businesses in the City and City fringes to learn from one another how to create prosperous, healthy and sustainable communities through the development of voluntary and socially responsible programmes.

The four key AIMS which support the delivery of its Mission are:

1. To inspire businesses that are new to the area of Corporate Social Responsibility ('CSR') to get started;
2. To provide practical support, through our NEWCOMERS' PROGRAMME, to these businesses to help them build sustainable programmes of engagement;
3. To raise awareness of effective of CSR programmes by showcasing good practice;
4. To maximise the reach and impact of the programme by inspiring the ongoing commitment of current and future funders and our business volunteers.

4. Main activities of your organisation

1. Delivery of our Newcomers Programme to encourage businesses without Corporate Social Responsibility programmes to start them.
2. Monitoring our our Newcomers Programme impact on business.
3. Delivery of a broker-lite pilot to encourage greater involvement from small to medium-sized enterprises in employability education to young people aged 12 to 19 years-old.
4. Delivery of an Alumni Programme for graduating Newcomers to ensure they continue to engage in the community and on relevant community themes, as well as to fund future cohorts of Newcomers.

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
4		10	100

6. How do you support your volunteers?

We meet each volunteer on a 1-1 basis at least once p.a. to see how we can best support them. We run one large volunteer event p.a. to talk to them collectively and have ongoing dialogue with each one through their individual support for our work.

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?
no	n/a

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	622,622
Activities for generating funds	0
Investment income	0
Income from charitable activities	0
Other sources	0
Total Income	622,622

Expenditure:	£
Charitable activities	496,641
Governance costs	61,495
Cost of generating funds	0
Other	0
Total Expenditure	558,136
(Deficit)/surplus for the year:	64,486

Asset position at year end	£
Fixed assets	
Investments	
Net current assets	148,479
Long-term liabilities	
*Total A	148,479

Reserves at year end	£
Endowment funds	
Restricted funds	20,443
Unrestricted funds	128,030
*Total B	148,479

* 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?
33%

10. Material changes

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

Heart of the City will be launching a paid-for service in early 2014 which we expect will significantly enhance our ability to self-fund our programme. We also have received funding from businesses to deliver an employability education programme to SMEs. See extra 'Purpose' attachment for explanation of reserves.

11. Previous applications to the Trust

Have you applied to the Trust before? If so, please give details:					<input checked="" type="checkbox"/>
Month/Year: May	/	2009	Ref: 9580	Grant received: £157,500	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: 2010	Year: 2011	Year: 2012
(i) City of London Corporation	189,000	198,000	207,000
(ii)			
(iii)			
(iv)			
(v)			
(vi)			

13. Previous grants received

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

	Year: 2011	Year: 2012
private sector employability pilot		55,000
Private Foundation (Peter Sherratt)		5,000

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

- We use recycling bins, double-sided printing and print two pages to one side of paper
- We have very little printed material and instead ensure all our marketing materials are downloadable from our website. Any printed material we do use is laminated for presentation purposes and therefore re-usable
- We take notes at meetings on our computer rather than in notebooks, saving paper
- We ensure all our computers are switched off at night
- We use public transport whenever possible
- We are based at the City of London Corporation and therefore link into and adhere to its sustainability programmes, including playing an active role in the City environmental forum and in the CoLC sustainability group

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.

Heart of the City's purpose is to create a sustainable society by changing and improving the system of small business engagement with local communities. Our model is simple: to transfer learnings from companies with robust, impactful community and environmental programmes to those which do not currently have them. This model, known as the 'Newcomers programme', takes shape through freely accessible tailored workshops of practical advice, an online portal of best practice tools and resources, Project Manager support and business-to-business mentoring. We work with traditionally 'sceptical' business leaders in order to create real change in their operations. We also target small to medium-sized enterprises without the resource to consider these issues in a structured or comprehensive manner. We know our model works as demand for our services is unprecedented and our impact on the community continues to grow and attract attention. The delivery of our Programme in the City fringes (Hackney, Tower Hamlets, Camden, Islington, Southwark, Lambeth and Westminster) is particularly important as it is an area containing significant levels of deprivation, with nearly 5,000 chairites in need of support and a high concentration of businesses (over 128,000).

Although our Newcomers Programme has been running in the 'City fringes' since 2008, we do not have a reliable source of funding to continue this free programme. Over the course of 2013 and 2014, we will be setting up a paid-for alumni service, the revenue from which will be used to fund the Newcomers Programme. We are seeking assistance from City Bridge Trust to help us deliver the free Newcomers Programme in the City fringes for two years while we get our Alumni Programme up and running.

With the City Bridge Trust funding, we will have six objectives: 1. To increase awareness in the private sector of the importance of supporting the third sector (thus exponentially increasing positive impact in the community); 2. To increase awareness in the private sector of the need to reduce carbon emissions (thus significantly decreasing carbon emissions); 3. To strengthen the third sector by channelling business support where the need is; 4. To improve the evaluation of not only our own services but also other third sector organisations through the education of their business partners; 5. To strategically use ICT to improve our services and to share our learning with other third sector organisations; 6. To build a self-funding model so that we have sustainable charitable operations.

A full set of measurable outputs and outcomes is set out in the attached Purpose.*

* on file

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

We have an entrenched culture of evaluation and are continuously improving our monitoring through the strategic use of ICT. To measure the outputs and outcomes from our Newcomers Programme, we will set up a baseline against which we will measure our progress at the end of the two years. We capture all resulting data on our database so we can run reports against a range of themes eg levels of volunteering, types of organisations supported, sustainability systems introduced etc. We can adapt and add to these questions to ensure that the outcomes relevant to this grant programme can also be measured. We will happily share data from our latest reporting round with you if it would be helpful.

To further measure our ability to strengthen the third sector, we will track the number and type of charities to which we give advice and the number of business referrals we make. We will also collect data on the quality of our engagement and our delivery of service.

At the end of Year 2, additional funds have been requested to do a full, cumulative evaluation of our work and our impact. This will be shared with our business supporters and our third sector colleagues.

17. Beneficiaries

How many people will benefit from the grant per year? **approx 10,000 directly affected through CSR programmes; more indirectly.**

In which local authority is your organisation based?
City of London

Which borough(s) of Greater London will benefit from this grant?
(if more than one, please give % for each)
Tower Hamlets, Hackney, Islington, Camden, Southwark, Westminster, Lambeth. Exact proportion is not known until we begin our recruitment.

At what address will the activity be located? **City and surrounding boroughs**

What age group will benefit? **All ages - both staff within the businesses engaged and the service users of their community partner organisation**

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?
Not known.

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 £
Total Cost of Newcomers Programme:				
1. Staff of 4, plus on-costs	211,227	213,413		
2. Programme delivery costs	303,000	303,000		
3. General Office costs	30,000	35,000		
TOTAL	544,227	545,000		1.08M

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
City of London Corporation	193,000	194,000		387,000
Business volunteers (in-kind; approx)	300,000	300,000		600,000
TOTAL	493,000	494,000		987,000

What other funders are currently considering the proposal?

Garfield Weston

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 and on-cost	46,227	47,413		93,640
Office costs (15% of total overhead)	5,000	5,000		10,000
research on impact		5,000		5,000
TOTAL	51,227	57,413		108,640

20. Funding requested from the Trust (continued)

When will the funding be required? **July 2013 (current funding runs out in June 2013)**

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

If so, how will it be resourced? **Staff member is on fixed-term contract, however we are building a self-funding model through our alumni programme (which will charge fees).**

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, **Carolyn Housman** (your name)

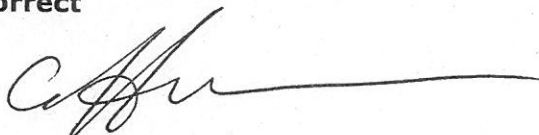
am an authorised representative of

Heart of the City (your organisation)

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

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

Signature



Date

18/09/2013

Return the completed form to: The City Bridge Trust

City of London

PO Box 270

Guildhall

London EC2P 2EJ

Please

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

ASSESSMENT CATEGORY - Strengthening the Third Sector

Forum for Health and Wellbeing

Ref: 11438

Amount requested: £58,886

Adv: Joan Millbank

Base: Newham

Benefit: Newham

Purpose of grant request: To establish 'Ready to Deliver', an accredited black and minority ethnic partnership to deliver health improvement services for people with or at risk of diabetes and heart disease.

Background

Forum for Health and Wellbeing (FHW) was set up in 1991 to develop a network of Black, Asian and minority ethnic (BAME) users and provider groups in Newham; a borough marked by high indices of poverty and cultural diversity. Over the years it has positioned itself as the strategic voluntary agency for BAME health and social care issues in Newham; it sits alongside health commissioning bodies in planning and reviewing provision. It gives voice to BAME service users and communities of interest, and provides capacity building support to Newham's 600+ BAME provider groups. FHW hosts and supports Newham LINK (sic), the local health involvement network. FHW is seeking to broaden its reach across London, where it has bid for contracts in collaboration with local voluntary organisations to provide the new 'Health Watch' service within the City of London and three East London Boroughs from April 2013.

FHW has developed a Communities of Health Framework (CoHF) to enable local community-based health and social care groups to gain recognition for their work and to provide for continuous improvement in their service provision. The framework has attracted interest from others, and won a national award in the Liberating Ideas National Prevention Category 2010, an award given by Capgemini consultancy and the Health Service Journal.

Funding History

You awarded a grant of £32,400 in May 2005 to strengthen and support Newham-based Black and Minority Ethnic community groups and voluntary organisations. The grant was satisfactorily monitored.

Current Application

FHW is seeking your support for its 'Ready to Deliver' initiative. It is seeking two year match funding to provide targeted capacity building and partnership development support to 30 BAME groups to provide health promotion and self-management services for approximately 680 residents with and at risk of diabetes and cardiovascular disease in Newham. Groups will be supported to achieve CoHF accreditation in order to become recognised providers by the Newham Clinical Commissioning

Group, the new health procurement body from April 2013. They will also be supported to form partnerships in order to provide a route for small BAME groups to access and secure commissioned funding. Skills and knowledge will be built through the provision of one-to-one support, group training and partnership learning sets, and the dissemination of up-to-date information via e-bulletins, social media and project website.

The approach has been endorsed by the emerging Newham Clinical Commissioning Group, which is investing £400,000 in FHW over two years to support BAME groups to provide tailored support to local residents in preventing and managing ill health. The Commissioning Group has indicated that funding could be extended to 10 years. A toolkit will be developed to share learning and, if successful, the model will be used to mainstream the approach, involve BAME groups in meeting other areas of clinical need within Newham and provide a model for other North East London boroughs.

Financial Observations

The audited accounts for the year ending 31st March 2012 show income of £617,892 and an end-of-year surplus of £38,734 (6.3% turnover). The reserves policy states that it aims to hold 20% of the organisation's annual income in reserve, equating to £123,600 in the year. At 31st March 2012 free undesignated reserves stood at £127,539, which is on target. The balance sheet shows that the organisation held £181,203 cash against creditors of £35,213.

For 2012-13 FHW set a balanced budget with expenditure of £587,719; all income has been secured and expenditure is on course. The 2013-14 draft budget shows a break-even position with estimated expenditure of £886,000.

Officer's Appraisal

The need for the project arises from changes in local health commissioning arrangements set out in the Health and Social Care Act 2012, health inequalities within Newham (BAME communities are at particular risk of diabetes and cardiovascular disease) and the challenges faced by BAME organisations too small and/or inexperienced to secure contract funding. Ready to Deliver provides a timely and creative way of building the capacity of Newham's BAME organisations and positioning the sector to meet the needs of its diverse communities in the new funding regime.

Recommendation

£58,900 over two years (£29,800; £29,100) towards a salary of a part time (18 hpw) Partnership Development Officer and on-costs required to establish Ready to Deliver.



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)

11438

Date Received:

10/10/2012

Programme
Area:

07

1. About your organisation

Name of organisation applying for grant: Forum for Health and Wellbeing	
If the organisation is part of a larger organisation, what is its name? Not Applicable	
Address for correspondence: St Marks Community Centre Tollgate Road Beckton, London	
Postcode: E6 5YA	
Is this your home address? No	
Contact person: Mr. Aidan Keightley	Position: Deputy Director
Phone: 020 7055 5970	Fax: 020 7474 3356
E-mail: aidan.keightley@bemccf.org.uk	
Website: http://www.bemccf.org	
Legal status of organisation: Registered Charity	
If registered, please give charity number: 1118229	
Date organisation established: 30/06/1991	

RECEIVED
The City Bridge Trust
12 OCT 2012
mit

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) To establish an accredited black and minority ethnic partnership to deliver health improvement services for people with or at risk of diabetes and heart disease.
How much funding is requested? Year 1: £29,793 Year 2: £29,093 Year 3: £0 Total: £58,886

3. Aims of your organisation

Charitable Purpose

"To improve the health and wellbeing of primarily black and ethnic minority individuals and communities through the delivery of effective challenge and solutions, thus enabling the statutory, voluntary and community sectors to create accessible, user defined services and ways of working."

Aims:

- * To ensure services effectively meet the health and social care needs of all but particularly black and ethnic minority communities by supporting at all levels of decision making and by campaigning,, researching and advocating for provision that meets the needs and aspirations of all
- * To develop and facilitate a strong, collective and informed voice of voluntary groups, service users and carers, which defines issues, provides solutions both by supporting effective networks and providing accessible, relevant information.
- * To capacity build the black and ethnic minority third sector enabling them to deliver their own health and social care services by providing tailored development support, access to funding, brokerage of partnerships and the identification of opportunities.

4. Main activities of your organisation

Four Cornerstones

1. Challenge with Solution --. We have a seat on all Newham's health and social care strategic decision making bodies as the recognised third sector representative. We are also the host for Newham Local Involvement Network, (LINK) and for the social care Co-Production Partnership ensuring effective representation of patients and social care users views.
2. Meaningful involvement -- Effectively engaging service users and carers in the planning, delivery and evaluation of services and supporting them to be representatives through consultation events and focus groups; recruiting, supporting, training and succession planning for representatives; assisting. national and regional organisations to engage with diverse communities.
3. Resilient communities - We assist primarily black and ethnic minority communities to fulfil their potential by providing capacity building services to develop internal systems, structures and sustainable strategies; one to one fundraising advice, training and partnership brokerage.
4. Building the Evidence - Ensuring an evidence base for our work by ensuring evaluation is factored in at the planning stages of our projects and services, undertaking research into the needs and solutions and delivering pilots .

5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
9	2	7	10

6. How do you support your volunteers?

- Volunteer policy developed and reviewed with volunteers
- Robust recruitment and induction, aligning volunteer aspiration to meaningful tasks.
- Clear task descriptions along with personal development plans, including training
- Agreed Reward and Recognition mechanisms
- Inclusion of volunteers within internal communication and consultation

7. Property occupied by your organisation

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

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	85,913
Activities for generating funds	0
Investment income	75
Income from charitable activities	531,904
Other sources	0
Total Income	617,892

Expenditure:	£
Charitable activities	567,515
Governance costs	11,643
Cost of generating funds	
Other	0
Total Expenditure	579,158
(Deficit)/surplus for the year:	38,734

Asset position at year end	£
Fixed assets	5,206
Investments	0
Net current assets	151,590
Long-term liabilities	0
*Total A	156,796

Reserves at year end	£
Endowment funds	0
Restricted funds	14,000
Unrestricted funds	142,796
*Total B	156,796

* 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?
70%

10. Material changes

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

N/A

11. Previous applications to the Trust

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

Month/Year:	2011	Ref:	0	Grant received:	£244,290	OR application rejected?	Yes
Month/Year:	6/05	Ref:	6353	Grant received:	£32,400	OR application rejected?	No
Month/Year:	6/03	Ref:	3120	Grant received:	£62,000	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)			
(ii) London Borough of Newham	177,037	172,611	214,502
(iii) London Development Agency	154,886	57,006	0
(iv) NHS Newham	109,064	108,480	132,039
(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
Big Lottery Fund	84,397	133,920
New Choices for Youth	0	16,200

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

- A regularly reviewed policy that sets out how we
- Reduce energy wastage and inefficiencies, cut back on overall energy use and reduce impact by sourcing renewable energy
 - Reduce travel by eliminating unnecessary journeys including holding events at venues near public transport, choosing and supporting use of sustainable transport and providing guidance on minimizing impact on cars
 - Use venues and suppliers that can demonstrate a commitment to reduce their impact
 - Maximize use of IT to support a paperless office and for promotion
 - Ensure we recycle and reuse our materials
 - Using local sources and fair-trade food option
 - Train and develop staff, volunteers, users and partner organizations
 - Set objectives and monitor and evaluate our impact

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.

From March 2013 Clinical Commissioning Groups (CCGs), headed by GPs will want new relationships with the third sector and new ways of evidencing impact. In Newham the CCG has committed to commissioning accredited third sector organisation to deliver a pathway of ill health preventative and health maintenance support through a patient tracked, locality based model of social prescription. Offering 5 interlinked services of nutrition, exercise, self-help, health promotion and well-being the accredited voluntary groups will eventually find their funding following the patient. This change requires business acumen and organisational capacity amongst organisations that, whilst being able to provide culturally diverse and tailored services, tend to be smaller and under resourced. This proposal will establish a skilled partnership with the range of services required for accreditation and commissioning. One of the poorest London boroughs, Newham's population dies younger and experiences some of the highest incidents of ill health. With a steering group of stakeholders The Forum has, through desk top research and consultation events/interview with over 50 people, ensured the relevance and impact of the project and subsequent partnership .

A comprehensive capacity building and partnership development support project for black and ethnic minority community organisations based in Newham to enable them to achieve accreditation and provide the pathway of care required by NCCG. We will provide support through four distinct but interlinked strands,:

1. Tailored recruitment of 40 potential partners followed by a comprehensive workshop induction and organisational baseline assessment. 30 partners will pledge to participate on basis of an organisational and partnership development plan.
2. Organisational Development to enable 30 individual partners to achieve Communities of Health Accreditation
3. Development of a partnership agreement, through group training and partnership facilitation, establishing joint purpose, work methodology, responsibilities, accountabilities and resource allocation
4. Using monitoring and evaluation to develop and disseminate a partnership and social prescription toolkit for the voluntary sector and CCGs

Employing a part time Partnership Development officer who will be responsible for strands 1, 3, and 4 above and support of the project steering group we will ensure.

40 individuals from organisations will report increased skills, knowledge and capacity including better awareness of support within the community and how to use techniques to improve organisational performance

30 organisations will have an improved understanding, experience and therefore confidence in undertaking collaborative working to achieve better outcomes.

30 organisations have increased reputation and networks within the local health system and are better able to inform the statutory sector decision making.

300 people with or at risk of contracting diabetes and cardiovascular disease will experience an improvement in the services they receive from supported organisations

The Forum

- A 19 year track record of successful delivery in health and social care including brokering productive partnerships and national awards
- Is based in and from black and minority communities
- Has strong supportive relationships with all key stakeholders
- An evidence base to work resulting in service improvements and increased capability
- Is accredited itself, 10 years Investors in People

The project specifically will assist minority ethnic and refugee community organisations become more sustainable through individual support and accreditation and to work more collaboratively in delivering health and care services in a manner that will be commissioned in the future.. Our commitment to each principle is set out in a specific policy and procedure and is underpinned by training and development of staff and volunteers, within our capacity building work, partnership arrangement and as part of our service and organisational monitoring/evaluation. Ready to Deliver will use this method within its work and is being specifically develop to promote diversity and share learning.

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

Outcomes established with the Project Steering Group, including those that measure Funding Programme impact will inform key performance indicators that will be a key element of our project plan review and a performance dashboard for reporting back to the Steering Group, the management committee and funders. The collection of information to support reports against indicators will be the responsibility of the staff member and the partner organisations with agreed clarity on the frequency and nature of what is to be collected as part of their commitment to be involved in the project and the partnership agreement. This computer held information will be drawn from qualitative and quantitative sources, for example numbers, profile and satisfaction with training. Reports will feature interpretation of data underpinned by quarterly internal and an independent evaluation with beneficiaries and stakeholders. The Steering Group will assess success, mitigate risk and test their impact conclusions with communities themselves.

17. Beneficiaries

How many people will benefit from the grant per year? 340			
In which local authority is your organisation based? Newham			
Which borough(s) of Greater London will benefit from this grant? (if more than one, please give % for each) Newham			
At what address will the activity be located? St Mark's Community Centre, Tollgate Road, Beckton, London E6 5YA			
What age group will benefit? Adult, All			
What will the ethnic grouping(s) of the beneficiaries be?			
	%		%
White - British		Black - Caribbean	12
White - Irish		Black - African	36
White - Other (please describe)		Black - Other (please describe)	
Asian - Indian	17	Black - British	12
Asian - Pakistani	23	Chinese	
Asian - Bangladeshi			
Asian - Other (please describe)		Other (please describe)	
			Open to everyone
What proportion of the beneficiaries will be disabled people? 60%			

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 salaries (inc NIC)	136,893	136,893		273,786
Management (supervision and finance & admin)	29,500	29,500		59,000
Operating costs				
Staff operating costs (travel, training)	4,950	4,950		9,900
Rent, rates	12,300	12,300		24,600
Photocopying, stationery, post	3,700	3,700		7,400
Telephone, broadband	3,600	3,600		7,200
Fees (Governance, IT, Audit, Insurance)	4,950	4,950		9,900
Project costs	33,900	33,200		67,100
TOTAL	229,793	229,093		458,886

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Newham Clinical Commissioning Group	200,000	200,000		400,000
TOTAL	200,000	200,000		400,000

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 £
Salary - 1 p/t post inc NIC	17,043	17,043		34,086
Project running costs				0
Partnership development activities	4,000	4,000		8,000
Partnership meeting costs	1,250	1,250		2,500
Project promotion	1,400	700		2,100
Overhead costs (including supervision and finance & admin fees)	6,100	6,100		12,200
TOTAL	29,793	29,093		58,886

20. Funding requested from the Trust (continued)

When will the funding be required? <p style="text-align: center;">01/04/2013</p>
Is the activity to continue beyond the period for which funding is requested? If so, how will it be resourced? The development and accreditation of the partnership will enable it to meet commissioner's intentions to purchase a comprehensive health improvement service from Newham's third sector. The robust nature of the partnership will enable it to effectively tender for this opportunity and to apply for other funds as part of an agreed fundraising strategy.
If any planning or other statutory consents are required for the project to proceed, what stage have the applications reached? Not applicable

Declaration on behalf of applicant organisation

I, Sahdia Warraich _____ (your name)
am an authorised representative of
The Forum for Health and Wellbeing _____ (your organisation)
within which I am Director _____ (your position)
To the best of my knowledge, all the information that I have provided in this application form is correct
Signature <u></u> Date 11 th October 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 use the correct postage** – the completed form and additional materials are likely to exceed 100g in weight

Committee(s):	Date(s):	
The City Bridge Trust	18 th April 2013	ANNEX N ^o . 17
Subject: Strategic Initiative – Centre for Accessible Environments Advisory Service	Public	
Report of: Chief Grants Officer	For Decision	
<u>Summary</u>		
<p>This paper seeks your approval to continue funding the Centre for Accessible Environments to provide an Access and Sustainability Advice Service for a period of three years, from July 2013, to be funded from your 2013/14 allocation for Strategic Initiatives.</p>		
Recommendation		
<p>That you approve a sum of £192,900 over three years (£65,000,; £62,800; £65,100) to continue an Access and Sustainability Advice Service, to be costed against your allocation for Strategic Initiatives 2013/14.</p>		

1.0 Purpose

- 1.1 This paper seeks your approval to commission the Centre for Accessible Environments to continue to provide an Access and Sustainability Advice Service over the next three years, from July 2013, for the benefit of applicants to your *Access to Buildings* programme and for the wider third sector in London.

2.0 Background

- 2.1 Since December 2005, you have commissioned the Centre for Accessible Environments (CAE) to provide an Access and Sustainability Advice Service in order to support applicants to your

Access to Buildings programme as well as the wider third sector in London.

- 2.2 You asked CAE to create the post delivering this service because applicants to your *Access to Buildings* programme often found it difficult to secure the full range of good quality advice and information needed when making access improvements. There was a great need for information on areas such as what an access audit is; how to find an access auditor; finding and appointing architects and quantity surveyors; what is liable for VAT; and disability equalities training. "*Sustainability*" was built into the job title in order to encourage organisations to consider the environmental impact of their buildings at the same time as when considering making access improvements.
- 2.3 This service is one of several specialist projects you fund in order to underpin and add value to your wider grant-making. These include your support for Charities Evaluation Services; the London Property Service at Ethical Property Foundation; the Cranfield Trust; and the Media Trust.
- 2.4 In 2007, you published '*Opening Doors Across London*' as a result of an evaluation of your Access to Buildings programme. Although it showcases examples of good practice, it also illustrates just how stressful managing a building project can be, especially for smaller organisations and highlights the importance of accessing good quality advice and information.
- 2.5 The postholder provides a much needed 'hand-holding' service from pre-application stage through to the completion of the building work, including site visits as required. She also provides workshops for third sector organisations on access and sustainability issues. The service is promoted on your website and applicants are encouraged to contact the postholder prior to submitting an *Access to Buildings* application.
- 2.6 We regularly receive feedback from organisations about the helpfulness of this service. Here are two typical examples:

"The service gave excellent guidance on how to choose a surveyor to undertake our access audit. It was also good to have a second opinion on the access report produced."

"Wai-Mei (the postholder) has provided advice and information to us since 2010 until now, throughout our project to refurbish the new Crossroads Women's Centre. It began with help in appointing an access auditor in 2010 and has continued until after we moved in,

our last meeting with her being in July 2012. We are very glad that City Bridge Trust established her post to support grantees undertaking building work, as this role is very much needed and greatly appreciated. "

3.0 Current Position

- 3.1 Your current funding for the post is due to end in June 2013 and this paper seeks your approval to commission the service for a further three years from July 2013. During early consultation on your Quinquennial Review, you agreed that you would continue to make grants towards access improvements to community buildings and officers are, therefore, of the view that the service will continue to be needed.
- 3.2 During 2012, the postholder worked with 95% of successful applicants applying on your *Access to Buildings* programme (compared with 47% in 2006). She also ran 12 workshops with an average attendance of 25 people.

4.0 Why the Centre for Accessible Environments?

- 4.1 CAE is the only disability charity that focuses specifically on accessibility and the built environment. It was established in 1969 to provide information and advice on making the built environment accessible to everyone. CAE collects and disseminates information on accessible building design, advances the understanding of the access needs of disabled and older people, and promotes good practice in the improvement of the quality of building and product design for all.
- 4.2 In June 2012, it became a wholly owned subsidiary of Habinteg, a housing association that promotes accessible homes for life and independent living. This move cemented what had been a long working relationship and has strengthened Habinteg's inclusive design offer. CAE, in turn, has benefited from becoming part of the Habinteg family and the resulting reduction in overhead costs.
- 4.2 Since the move, CAE has been able to continue its core activities, which comprise: access consultancy, including access audits and drawing appraisals; publications and design guides; training; a library and website; a quarterly magazine, *'Access by Design'*; and one-off research projects, such as the accessibility of ATM machines. It was instrumental in establishing the National Register of Access Auditors (NRAA) and provides NRAA's administrative base. It is also a co-sponsor of the RIBA Inclusive Design award.

- 4.3 It has therefore amassed considerable expertise in this field. The Access and Sustainability Advice Service complements CAE's wider work and the postholder is able to draw on CAE's resources to inform and support her work.

5.0 Proposals

- 5.1 If you agree to commission the service for a further three years, the postholder will continue to promote the service and the funding available from the Trust widely, including through workshops and other events and through various second tier bodies such as the CVS network. The postholder is also making increased use of social media, such as Twitter, Facebook and blogging.
- 5.2 She will continue to attend third sector networks, relevant to managing community buildings, such as the London Premises Subgroup (whose membership includes the Ethical Property Foundation, Locality, Planning Aid London and Community Matters). She will also continue to maintain links with local disability networks, including the London Access Forum. The promotion of this service reflects well on the Trust and its commitment to an inclusive London.
- 5.3 A number of building regulation changes are due to be implemented during 2013/14 and the postholder will therefore be involved in a radical overhaul and updating of the full range of publications, factsheets and webpages relating to accessible buildings. Topics range from best practice for accessible toilets; clarification about tax exemptions in relation to changes to Listed Buildings Exemptions; and recycling and sustainability development.
- 5.4 She will continue to encourage organisations to consider making their buildings more sustainable and to promote your Greening the Third Sector programme whereby you provide organisations with a free eco-audit.

6.0 Cost

- 6.1 The total cost of providing the Access and Sustainability Advisory Service over the next three years is £192,900 (£65,000; £62,800; £65,100). This includes the salary and on-costs of the postholder; technical support from across the CAE team; publications; website development; line management and a contribution to core costs.
- 6.2 During the past three years you have awarded a total of £2.7m in grants under your Access to Buildings programme. The cost of

continuing the service for a further 3 years represents 7% of this sum.

- 6.3 The allocation for Strategic Initiatives for 2013/14 amounts to **£747,500**. This represents 5% of your total grants budget of £14,950,000 for 2013/14. If you approve funding to continue the Access and Sustainability Advisory Service for a further three years, the allocation remaining for the rest of this financial year will be £554,600.

7.0 Conclusion

- 7.1 The Access and Sustainability Advice Service has grown into an extremely important element of your funding portfolio. It adds value to your grant-making by ensuring that those funded on your *Access to Buildings* programme have access to good quality advice and support.
- 7.2 As part of your Quinquennial Review, you have agreed that you wish to continue to make grants to help voluntary organisations make their buildings accessible. The need for organisations to continue to access good quality advice and support will therefore continue.
- 7.2 CAE is a leading authority on inclusive design in the UK and is ideally placed to host the Access and Sustainability Advisory Service over the next three years.

8.0 Recommendation

That you approve a sum of £192,900 over three years for an Access and Sustainability Advice Service, to be costed against your budget for Strategic Initiatives 2013/14.

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