

**MEETING: 28/11/2013**

**Ref: 11979**

**ASSESSMENT CATEGORY - Accessible London - Arts**

**Otakar Kraus Music Trust**

**Adv: Ciaran Rafferty**

**Base: Richmond**

**Amount requested: £35,520**

**Benefit: Richmond &  
neighbouring boroughs**

**Amount recommended: £35,600**

**Purpose of grant request:** Provide a specialised 'Music School' to enhance the musical talent and personal development of children and young people with special needs.

**Background**

Otakar Kraus Music Trust (OKMT) is a small but impressive charity which was established in 1991 to provide music therapy for people of all ages who have physical, psychological, behavioural, learning or emotional difficulties. It is managed on a voluntary basis by its founder but employs some part-time staff for its general administration and for its therapy programmes. (The charity is named after Otakar Kraus OBE, a renowned opera singer and voice teacher.) It now provides over 2,000 individual and 300 group therapy sessions per year.

**Funding History**

An application to your Small Grants programme in 2007 was declined as the organisation's turnover exceeded the programme's threshold.

**Current Application**

This application is to provide a Music School project for young people with special needs. In fact a grant, if awarded, would be used to expand an existing one day-per-week project (funded by BBC Children in Need) and for which there is a long waiting list. The School will target children and young people aged 5 – 25 and who have a range of special needs, including many who have no verbal communication at all. OKMT's specialist lead therapist has devised a range of techniques and activities to use music to help the young people to interact socially and to gain confidence and improve communication.

In the current project the young people have achieved significant personal outcomes and, in many cases, been able to perform in public or to take music exams. Whilst the project will continue to use OKMT's purpose-built studio it will also deliver sessions in local church hall and community venues to ensure that young people can access the scheme from as wide an area as possible. The Music School targets young people from families who would be unable to afford to pay for private or unsubsidised therapies.

## **Financial Observations**

Audited accounts for the year ended 31<sup>st</sup> December 2012 show an overall surplus of £13,965 (7.7% of turnover) comprising a surplus of £19,234 on restricted funds partially offset by a deficit of £5,269 on unrestricted funds. Free unrestricted reserves held at the year-end amounted to £50,161, equating to 3 months' worth of forecast expenditure for 2013. The organisation's reserves policy is to aim to hold 6 months' worth of total expenditure.

The budget for the current year to 31<sup>st</sup> December 2013 forecasts total income of £207,000 of which £186,000 (90%) has been secured as at 13<sup>th</sup> November 2013. After total expenditure of £198,600, a surplus of £8,400 is anticipated, all on unrestricted funds.

The charity is currently preparing a budget for the next financial year to 31<sup>st</sup> December 2014 and, should any grant be recommended by the Committee today, it is suggested that it be subject to receipt of a satisfactory budget for 2014.

*Generating funds* - Q8 in the application form shows income from generating funds of £18,650, whereas the total cost of generating funds is reported as £44,759. However, on clarification with the organisation they state that only £3,240 was actually spent on fundraising events during the year.

## **Officer's Appraisal**

OKMT has been providing music therapy for 22 years and has developed expertise and systems appropriate to achieving very valuable and tangible results. Its work with young people takes a whole-family approach and provides, directly and indirectly, much comfort and support to parents and siblings. Key personnel within the organisation are registered with the Health and Care Professions Council and all therapists are suitably qualified and with proper supervisory arrangements in place. Your funding, as requested, would make a significant difference to the lives of young people with special needs.

## **Recommendation**

**£35,600 over three years (£11,200; £11,800; £12,600) for the costs of providing a specialised Music School for one day per week, subject to receipt of a satisfactory budget for 2014.**



# 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)

11979

Date Received:

05/07/2013

Programme  
Area:

01

### 1. About your organisation

Name of organisation applying for grant: <b>Otakar Kraus Music Trust</b>	
If the organisation is part of a larger organisation, what is its name?	
Address for correspondence: [Redacted]	RECEIVED The City Bridge Trust  24 JUL 2013
Postcode: [Redacted] Is this your home address? <b>Yes</b>	MH
Contact person: <b>Dr Margaret Lobo</b>	Position: <b>Founder / Director (unpaid)</b>
Phone: [Redacted]	Fax:
E-mail: <b>okmtrust@aol.com</b>	
Website: <b>http://okmtrust.co.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	
If registered, please give charity number: <b>1009797</b>	
Date organisation established: <b>07/01/1991</b>	

### 2. Request for funds

Under which of the Trust's themes are you applying (see our website or brochure for further details)? <b>Accessible London\Accessible Arts</b>
Purpose for which funds are requested: (25 words maximum) <b>Provide a specialised 'Music School' to enhance the musical talent and personal development of children and young people with special needs.</b>
How much funding is requested? <b>Year 1: £11,160 Year 2: £11,836 Year 3: £12,524 Total: £35,520</b>

### 3. Aims of your organisation

Otakar Kraus Music Trust is an independent charity established in 1991 to provide subsidised music therapy for people of all ages who have physical, psychological, behavioural, learning or emotional difficulties, in order to improve the quality of their lives and allow them to reach their potential.

Music Therapy is a worldwide scientifically proven method of reaching people and helping them to communicate. It is based on the understanding that the innate ability to respond to music remains unimpaired by disability, injury, illness or trauma. Music has a universal appeal, moving us at all levels of our being: body, mind and spirit. Its communicative power transcends verbal or physical barriers, creates a connection and unlocks creativity. We aim to use Music Therapy to harness this power to enable people who find it hard to communicate through traditional channels to express and fulfil themselves.

We also aim to provide information to health and education agencies, the media and the general public.

### 4. Main activities of your organisation

OKMT provides over 2,500 individual and group therapy sessions annually throughout the London Borough of Richmond and surrounding areas, including Hounslow. Our highly qualified music therapists work with all age groups from toddlers to the elderly, either at our own studio, or in many innovative projects with schools, voluntary groups or community groups. Projects include:

Music & Me - parent/carer toddler group for children aged 18 months to 3 yrs old with special needs, to help develop communication.

Music Club - group music therapy for children with special needs aged 2 - 14 using the exploration of sound and movement to help build positive relationships, develop confidence, self-expression and communication skills.

Music School - 1-1 or small group sessions for children to explore their musical talent, and over time focus on one instrument, with the intention of working towards performance and music exams.

Music School Choir

Music Therapy for Adoption

Art Therapy and Singing Therapy for parents of children with special needs

Therapists give regular lectures and workshops to promote awareness and understanding of music therapy and its healing role.

### 5. Number of staff

Full-time	Part-time	Management committee members	Active volunteers
0	10	8	2

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

We provide induction & in house training with our administrator. We give volunteers the opportunity to observe our therapists, to learn how music therapy works. We welcome feedback, invite them to functions such as concerts and reimburse 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?
Owned	

## 8. Finance

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

Financial year ended - **Month: December**

**Year: 2012**

<b>Income received from:</b>	<b>£</b>
Voluntary income	8,950
Activities for generating funds	18,650
Investment income	168
Income from charitable activities	152,892
Other sources	0
<b>Total Income</b>	<b>180,660</b>

<b>Expenditure:</b>	<b>£</b>
Charitable activities	121,786
Governance costs	150
Cost of generating funds	44,759
Other	0
<b>Total Expenditure:</b>	<b>166,695</b>
<b>(Deficit)/surplus for the year:</b>	<b>13,965</b>

<b>Asset position at year end:</b>	<b>£</b>
Fixed assets	0
Investments	0
Net current assets (liabilities)	108,189
Long-term liabilities	6,768
<b>*Total A:</b>	<b>101,421</b>

<b>Reserves at year end:</b>	<b>£</b>
Endowment funds	0
Restricted funds	51,260
Unrestricted funds	50,161
<b>*Total B:</b>	<b>101,421</b>

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

## 9. Statutory funding

For the financial year above, what % of your income was from statutory sources?  
**50%**

## 10. Material changes

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

**Hired two part time Administration staff**

## 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)			
(ii) London Borough of Hounslow	20,000	20,000	0
(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
BBC Children In Need	9,000	9,000
Mercers		5,000
Hampton Fuel Allotment		7,340
HACC	1,470	
St. James Place		9,700
Several other Grants	2,777	6,080

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

We do not have an office and so save on energy costs. The Director and all admin staff work from home reducing travel costs. We work mainly on email to reduce paperwork. Clients come to one facility at our Centre in Twickenham; all outreach work the therapists travel to them, saving petrol costs to the parents/carers and schools. We enforce a re-cycling policy for paper e.g. using the back of unwanted paperwork in the printer. We use a local source for re-cyclable ink cartridges.

OKMT also researches into organisations, both charitable and commercial, who will consider passing on to it free of charge equipment they no longer use but are still in good working order - our computers were procured in this way. Most of our musical instruments are second hand as they have been donated to us

## 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 children and young people we aim to help have learning, physical, emotional or behavioural difficulties. Some have behavioural problems and most have little or no verbal communication. They are often isolated and have difficulties with social interaction, self-confidence, and focus, suffering from a lack of opportunity for development and expression.

Music has the power to reach children who have profound communication difficulties. Our therapist, Edison Carolino, has devised projects to help isolated children use music to socially interact and gain confidence and communication skills. He observed the natural musical talent of some and created Music School to develop this talent using specialist therapeutic techniques.

Music School started at our music studio for one day a week in Autumn 2012 and already we have a waiting list of 45, and so are seeking funding from The City Bridge Trust to expand to a second day in the community to meet this demand. We aim to help over 200 children over 3 years.

Music school is open to children and young people aged 5 to 25.

Stage 1: Individual sessions to develop auditory skills by listening to different instruments and interacting on the keyboard.

Stage 2: 40-45 minute sessions learning to sing and play instruments such as xylophone, recorder, drums, flute or piano.

Stage 3: 1-1 or small group sessions. When the children show an attachment to a particular instrument, this is focused on with the intention of preparing for performance and to provide the grounding to take music exams. A choir will also be formed.

The aims of the Project are to

1. Improve relationships, increase confidence, communication skills, ability to concentrate, and develop self-expression and joy while playing music with others
2. Improve musical skills to progress to music exams
3. Encourage the pupils to perform in public helping to increase their confidence and independence as they learn a skill and perform in front of others
4. Allow improved self-esteem and social interaction skills to help with a better learning focus at school, a more stable home life for child and family; increased personal development leading to happier children and young people able to fulfil their potential.

Music School gives its pupils with special needs the highly specialised therapy, training and focused attention unavailable to them elsewhere and the opportunity to develop their musical talent gaining a joyous friend for life, and the confidence to perform in public or take music exams.

OKMT has been providing music therapy for over 22 years. Its founder and Director, Dr Margaret Lobo is a Fellow of the RSA and was awarded an Honorary Doctorate in 2010 by Middlesex University for her work. All of our therapists are highly qualified and Edison is vastly experienced at using different strategies to build confidence and promote learning.

We involve the children by following their choice of instrument, and as their social interaction skills improve they will be involved in choosing what to perform or what exams to take.

Christopher has autism and was non verbal and withdrawn. After many years of music therapy, his speech improved and he asked to learn the flute. He is now preparing for his grade 4 flute exam and has performed in public. Luke, a 16 year old with Down's Syndrome, who previously had speech and short term memory problems is composing and performing his own music and enjoys interacting with others. These are the opportunities we wish to offer to others.

We welcome people of all backgrounds as our therapists or clients - more than 20% of our beneficiaries are from minority ethnic groups and all have special needs.

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

Evidence will be collected through therapist and parent observation, filming of sessions and questionnaires. The therapist produces an evaluation for all the children attending Music School based on this observation and how much progress they have made in musical skill and also communication and confidence. Surveys are also used for parents to provide feedback on how the progress the children have made in social interaction and communication has spread to other environments such as home or school.

The children's feedback will be gathered - smiling, eager to take part, saying they 'love it'. We can observe the development in their musical skill as they focus on one instrument and progress can be measured by music exams taken. Evidence of increased confidence and self-expression will be gathered through the public performances they give and the choices they go on to make. The first Music School Concert is on 12th July 2013.

**17. Beneficiaries**

In line with our anti-fraud policies, we may, in exceptional circumstances, require you to provide contact details of your beneficiaries (see Guidance Notes).

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

What age group will benefit? **Over 5 years, over 11 years, over 16 years**

In which local authority is your organisation based?  
**Richmond**

Which borough(s) of Greater London will benefit from this grant?  
(if more than one, please give % for each)  
**Richmond and surrounding Boroughs including Hounslow, Ealing, Kingston**

At what address will the activity be located?  
**United Reformed Church, First Cross Road, Twickenham TW2 5QA**

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

	%		%
White - British	<b>65</b>	Black - Caribbean	<b>2</b>
White - Irish	<b>3</b>	Black - African	<b>3</b>
White - Other (please describe) European	<b>9</b>	Black - Other (please describe)	
Asian - Indian	<b>5</b>	Black - British	<b>8</b>
Asian - Pakistani	<b>2</b>	Chinese	<b>2</b>
Asian - Bangladeshi	<b>1</b>		
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 £
Music Therapist Fee x 2 days per week	18,000	19,000	20,000	57,000
Fees for assistant musician x 2 half days per week	1,800	1,900	2,000	5,700
Rent for United Reformed Church Hall x 36 weeks	1,260	1,386	1,524	4,170
Admin Costs £12 x 4 hrs per week x 36 weeks	2,592	2,850	3,136	8,578
<b>TOTAL</b>	<b>23,652</b>	<b>25,136</b>	<b>26,660</b>	<b>75,448</b>

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

Source	Year 1 £	Year 2 £	Year 3 £	Total £
Help a Capital Child (funding expires January Feb 2014)	3,675			3,675
Mercers (funding expires February 2014)	5,000			5,000
<b>TOTAL</b>	<b>8,675</b>			<b>8,675</b>

What other funders are currently considering the proposal?

Funder	£
BBC Children in Need (over 3 years)	40,000
<b>TOTAL</b>	<b>40,000</b>

## 19. Funding requested from the Trust

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

Expenditure heading	Year 1 £	Year 2 £	Year 3 £	Total £
Music therapist fee £250 per day 1 day per week x 36 weeks	9,000	9,500	10,000	28,500
Assistant Musician fee £25 per day 1 hf day per wk x 36 wks	900	950	1,000	2,850
Rent for United Reformed Church Hall £35 per week for 36 weeks. 10% increase each year	1,260	1,386	1,524	4,170
<b>TOTAL</b>	<b>11,160</b>	<b>11,836</b>	<b>12,524</b>	<b>35,520</b>

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

When will the funding be required?

**05/11/2012**

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

If so, how will it be resourced?

**We will make funding applications to national and local Grant giving bodies and to Rotary Clubs. Also through donations, fundraising concerts & events.**

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

**None required**

## 21. Referee

Please provide us with the contact details of a current or recent funder of your organisation who is willing to act as a referee.

### Referee

**Name:** Richard Horsnell

**Organisation:** Help a Capital Child

**Address:**

30 Leicester Square  
London WC2H 7LA

**Tel:** 020 7054 8396

**E-mail:** Richard.Horsnell@capitalfm.com

## Declaration on behalf of applicant organisation

I, Margaret Lobo (your name)

am an authorised representative of

Otakar Kraus Music Trust (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. I fully understand that the City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.**

Signature



Date 18/07/2103

### How your information will be used by the Trust

City Bridge Trust (which is administered as part of the Bridge House Estates by the City of London Corporation) processes personal data in compliance with the Data Protection Act 1998. The Trust obtains and uses information, including personal data, as part of the process of assessing grant applications and monitoring the use of grants. The information you provide on the application form may be made public as part of the assessment of this application. In addition, the Trust may share this information with third parties, including other funders, its external consultants and external auditors, police and regulatory bodies for the purpose of determining, preventing or detecting crime; or ensuring that no organisation is receiving duplicate funding; or the validation of contracts; or where this is otherwise required by law.

**By signing and submitting your application form you give your explicit consent for us to use data relating to your application as set out above.**

Our contact details for enquiries about how we process your information are:

The City Bridge Trust, City of London, PO Box 270, Guildhall, London EC2P 2EJ. Telephone: 020 7332 3710

### Concerns over fraud and corruption

Should you, at any time, have concerns of fraud and corruption within your organisation relating to the grant, then please raise your concerns with us using our Whistle Blowing facilities. You may use our Audit team's 24 hour answer phone number, 020 7332 3663, to report the details or email [raiseyourconcern@cityoflondon.gov.uk](mailto:raiseyourconcern@cityoflondon.gov.uk)

**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