

MEETING 13/03/2014

Ref: 12123

ASSESSMENT CATEGORY - Improving London's Environment

Epping Forest Charitable Trust

Adv: Jenny Field

Amount requested: £1,497,000

Base: City

Benefit: Several London boroughs

Amount recommended: £388,000

Purpose of grant request: Educate and involve Londoners in protecting and conserving the trees and ecosystems of Epping Forest and Hampstead Heath.

Background

This application has been made by Epping Forest in partnership with Hampstead Heath. The Mayor, Commonality and Citizens of the City of London is the corporate trustee of both charities. It requests funding over three years to enable Epping Forest and Hampstead Heath to deliver an education and volunteering programme designed to increase Londoners' knowledge and understanding of the green environment and biodiversity; and to maintain and enhance the biodiversity of London.

Funding History

In April 2011, you approved a grant of £3,000,000 over 3 years (3 x £1,000,000) towards a wide programme of environmental education and biodiversity activities within open spaces across London, subject to the approval of the Court of Common Council, which was granted in June 2011. The applicant body on that occasion was Hampstead Heath Charitable Trust on behalf the charities Epping Forest, West Ham Park and of Highgate Woods and Queen's Park Kilburn. The grant was to support the environmental education work and to maintain and enhance London's biodiversity of those open spaces. It is due to end at the end of March 2014.

The grant was awarded from income of £5 m from Bridge House Estates that the Policy and Resources Committee in July 2010 determined was surplus to bridge requirements and therefore could be transferred to the CBT budget in order to "...supplement the grant-making capability of the City Bridge Trust.". The grant was awarded under the criteria of your previous Working with Londoner's programme, *London's Environment*.

Reporting on the work undertaken has been of a consistently high standard and has enabled the open spaces concerned to undertake a wide range of work that has either delivered environmental education to London's communities, or has maintained and enhanced London's biodiversity, in line with the criteria of the funding programme.

By the time of submitting the application before you today, the previous grant had enabled 30,000 students and 3,000 teachers to participate in environmental education sessions. Much of the funded work has focused on outreach to disadvantaged and hard to reach communities by targeting schools in areas of particular disadvantage. Outreach work has also taken place to target new and

traditionally hard to reach communities, for example, engagement with primary-aged children from one of the estates in Hackney that were most affected by the 2011 riots in London; and outreach through Euston Time Bank Homework Club.

A plethora of volunteering opportunities has been made available that enable communities to engage with the environment, ranging from meadow mowing, restoration of heathland habitats, species surveys and tree wardens.

Overall, the work funded has engaged many thousands of Londoners at a number of levels. For example, events for families at Epping Forest, including special events for children with special needs, have reached an estimated 12,000 people in the past year. The four visitor centres at Epping Forest saw an increase in visitor numbers of 37% compared with the previous year, with 87,953 visits being made. Informal outreach has made local families more aware of the adventure playground at Hampstead Heath with a 7% increase in over 12s using the site last year (12,474 visits).

Current Application

You are asked to support Epping Forest and Hampstead Heath's education and volunteering programmes. It is proposed to continue to target the education programme at areas of disadvantage as these children usually have least access to environmental education in green areas. Your continued support will enable new schools to be targeted in the thirteen boroughs with areas of deprivation near to Epping Forest and Hampstead Heath. Where the previous outreach programme had focused on children and families, it is proposed to broaden this out to general visitors with the aim of developing volunteering opportunities for adults that will increase their knowledge of the green environment and biodiversity. Volunteers will also be given the opportunity to work alongside paid staff and engage in activities such as species identification that will maintain and enhance biodiversity in London.

A detailed breakdown of the proposed activities for Year 1 has been provided to complement the application form. This includes working in partnership with LB Camden's youth services to enable cohorts of four young people on reparation orders to learn valuable conservation skills; engaging volunteer tree wardens to identify signs of stress in trees and vegetation in Epping Forest; developing the Kenwood Education Centre to pilot a programme with 200 schoolchildren; education sessions for primary and secondary schools that will bring at least 4,000 pupils and students to Epping Forest; a series of learning events to reach new visitors with the aim of attracting approximately 500 people; evening courses on the historical and ecological importance of Epping Forest; and health walks and park runs from Epping forest.

The workplan also breaks down plans to involve volunteers in the maintenance and enhancement of the biodiversity of these open spaces through species identification and monitoring activities. This includes developing volunteers' skills to identify and remove non-native species, and how to recognise and remove problematic native species and the importance of this to habitat management; training volunteers in species identification and monitoring, such as stag beetles and grass snake populations; involving volunteers in the photographic monitoring of vegetation tracts to measure the impact of grazing and wood-pasture restoration work; and in species

monitoring as a means of measuring the wider impacts of conservation management, grazing re-establishment and environmental conditions each year.

Financial Observations

As this is a partnership bid between Epping Forest and Hampstead Heath, with Epping Forest acting as the lead applicant, financial observations are provided for both charities.

Epping Forest Charity:

Audited accounts for the financial year ended 31st March 2013 show a break-even position on operating activities. Designated funds increased by £663,203 during the year due to the receipt of grant funding from the Heritage Lottery Fund, Essex County Council and the Metropolitan Police towards the restoration and development of heritage assets at Epping Forest and towards works at Jubilee Pond. Restricted funds reduced during the year by £101,083 due to the spending of monies, received in prior years, on the Epping Forest Branching Out Project and education and biodiversity services. A net gain on investment assets of £1,081 contributed to an overall increase in funds of £563,201.

The charity does not hold any free unrestricted general reserves due to its operating activities being supported each year by investment income and grant funding, largely from the City of London Corporation. However, at the 31 March 2013 the charity held £29,035 in restricted funds and £1,057,735 in free designated funds towards the costs of several projects and activities, such as £538,804 towards the purchase, construction or repair of buildings or the purchase of land, £193,851 towards the EF Branching Out Project and £194,400 towards works to Jubilee Pond on Wanstead Flats.

Expenditure of £6.5m has been approved for 2013/14 and £6.8m in 2014/15.

Hampstead Heath Charity:

Audited accounts for the financial year ended 31st March 2013 show an overall deficit of £173,634 (2.1% of turnover), comprising £136,966 on unrestricted funds and £36,668 on restricted funds. A net gain on investments of £3,447,270, contributed to an overall increase in funds of £3,273,636.

At 31st March 2013 free unrestricted reserves stood at £64,402 equating to approximately 3 days' worth of total expenditure. However, the reserves policy of the charity is that the original endowment of £15m provided by the London residuary Body (now worth £26.5m) should be preserved in real terms and produce income to cover a proportion of the running costs of Hampstead Heath; the endowment fund provided income of £1,146,583 during the year 2012/13, equivalent to 1.7 months' worth of operating expenditure. The balance of expenditure each year is met from donations, sales, fees, charges, rents, external contributions and grants, largely provided by the City of London Corporation.

Expenditure of £8.2m has been approved for 2013/14 and £8.7m in 2014/15.

Officer's Appraisal

Funding has been requested for three years. However, as you will be aware, there are currently corporate financial Service Level Reviews underway. These are due to report to the Members of the Court in June 2014. Officers are of the view, therefore, that should you agree funding for Epping Forest and Hampstead Heath today, this should be for one year only to enable it to continue its educational and volunteering activities until the outcomes of the Reviews are implemented in 2015/16.

When you awarded the grant on the previous occasion, due to the unusual circumstances of the application (being made by the City Corporation in its capacity as the trustee of Hampstead Heath) advice was sought from Leading Counsel. He advised that it would "very rarely, if ever, be a proper exercise of the Trustee's discretion to apply income of the [BHE] Charity in a manner which relieved the City Corporation of an obligation which it was legally subject, whether by statute, by contract or otherwise, even if the purpose for which it was applied would in other circumstances be regarded as charitable."

Leading Counsel advised that it would therefore not be proper for the Trustee to apply any part of the income of BHE to meet the City Corporation's duties towards the open spaces, which broadly could be categorised as protecting and preserving them for the benefit of the public. Leading Counsel advised, however, that CBT could properly consider making a grant towards the expense of carrying out environmental and educational projects which take place in the Forest or on the Heath; particularly as, on that occasion, the funding was coming from additional budgetary provision from surplus income of Bridge House Estates and would not, therefore, prejudice the policy which had been formulated for the majority of applications.

Officers are of the view that most of the proposed activities meet the funding outcomes of your new Investing in Londoners programme, *London's Environment*, specifically:

- more Londoners with a greater knowledge and understanding of the green environment and biodiversity
- more Londoners reporting improved well-being through greater use of open spaces and through growing and greening initiatives.

However, on the evidence that officers have seen and carefully assessed in support of this application, some of the proposed activities do not appear to extend beyond the City Corporation's duties to preserve and protect these open spaces or do not fall within the scope of the Investing in Londoner's programme. These costs have therefore, been extracted from the level of grant recommended.

Recommendation

£388,000 over one year towards Epping Forest and Hampstead Heath's volunteering programmes which will increase Londoners' skills, knowledge and understanding of the green environment and biodiversity.

The City Bridge Trust

Investing In Londoners: Application for a grant



About your organisation

Name of your organisation: Epping Forest Charitable Trust	
If your organisation is part of a larger organisation, what is its name? Open Spaces, City of London	
In which London Borough is your organisation based? City	
Contact person: Mrs Jennifer Allott	Position: Departmental Business Manager
Website: http://www.cityoflondon.gov.uk/openspaces	
Legal status of organisation: Registered Charity	Charity, Charitable Incorporated Company or company number: 232990
When was your organisation established? 01/06/1878	
<p>Aims of your organisation:</p> <p>This application is made by Epping Forest Charitable Trust in partnership with Hampstead Heath Charitable trust. Both charities are governed by separate acts of parliament which outline the statutory obligations regarding the land. The aims of the Open Spaces department, which administers the charities, are to:</p> <ol style="list-style-type: none"> 1) Provide safe high quality accessible open spaces and services in accordance with nationally recognised standards for the benefit of London and the nation. 2) Celebrate a sense of place by involving communities in the care and management of our sites. 3) Adopt sustainable working practices, promote the variety of life and protect the Open Spaces for the enjoyment of future generations. 4) Promote opportunities to use and enjoy the outdoor environment for recreation, health, learning and inclusion and ensure the value of the open spaces is recognised. 5) Manage, develop and empower and capable and motivated workforce to achieve high standards of safety and performance. 	
<p>Main activities of your organisation:</p> <p>The City of London manages over 11,000 acres of Open Spaces in and around London for the recreation and enjoyment of the public. These are breathing spaces for our communities, London's important natural habitats and rare species. In this application we are focusing on the activities of two charitable trusts, Epping Forest, which has for centuries been a place of work and play for the communities of north and east London and Hampstead Heath, an iconic open space for the capital.</p>	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
188	35	35	1,000

Property occupied by your organisation

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

Grant Request

Details of grant request

Under which of City Bridge Trust's programmes are you applying? Improving London's Environment
Which of the programme outcome(s) does your application aim to achieve? More Londoners with a greater knowledge and understanding of the 'green' environment and biodiversity More people reporting improved wellbeing through greater use of open spaces and through growing and greening initiatives
Please describe the purpose of your funding request in one sentence. Educate and involve Londoners in protecting and conserving the trees and ecosystems of Epping Forest and Hampstead Heath.
When will the funding be required? 01/04/2014
How much funding are you requesting? Year 1: £489,000 Year 2: £499,000 Year 3: £509,000 Total: £1,497,000
Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to fund it? Both charities intend to continue volunteering and educational programmes beyond the time frame of the grant application, although specific activities are planned only for the three year period of the bid. It is intended that a funding strategy for these activities is developed which will investigate the funding options for these programmes.
If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached? None required.

Summary of grant request

The purpose of our project is to encourage Londoners to deeply engage in two open spaces: Hampstead Heath and Epping Forest. The project aims to deliver CBT's environment programme aims by delivering a diverse range of educational and volunteering projects relating to the ecosystems and trees of the sites. While we have a statutory duty to protect the sites and promote biodiversity, we do not have a statutory duty to educate people about the importance of the sites or involve people in our conservation work. This project seeks to support activities which go beyond our statutory duties.

Our project is led by the Epping Forest Charitable Trust, but is delivered in partnership with the Hampstead Heath Charitable Trust. The theme of the bid is Healthy Trees, Healthy Ecosystems and Healthy Londoners. These themes will each be delivered across the two sites with activities planned to best suit the unique features of the sites.

There are three mechanisms by which our activities will achieve CBT's aims. The first are educational activities which provide opportunities for a wide range of people to learn at our sites. We will also focus some of activities on developing our educational programme and facilities. The second mechanism involves volunteering opportunities, where individuals can deepen their understanding through participating in conservation or monitoring activities. The third mechanism involves building a richer picture of the ecosystems of our sites for the benefits of current and future visitors through surveys and monitoring.

Healthy Trees

This strand of work uses all three mechanisms. Firstly there are activities which build up a picture of the health of trees, including veteran trees of national importance. Both sites will support the Open Air Laboratories Tree Health Survey, which seeks to encourage people to participate in science. The survey takes place between May and September and aims to train members of the public in how to survey trees and encourage people to report on tree health across the country. We would deliver training and seek to maximise participation at our sites. Other elements of the work include surveying trees for disease and to develop the Veteran Tree Register. We would also develop an education session focused on trees, which would be delivered to primary school children from communities around Hampstead Heath.

Health Ecosystems

This strand of work focuses on involving volunteers in work to protect and enhance biodiversity at our sites. Volunteers will receive intensive training from ecologists so that they become competent in conducting species surveys or management techniques such as clearing invasive species. These volunteering opportunities are of great value to young people who wish to build careers in ecology or land management. We will offer a range of opportunities which will allow volunteers to focus on their areas of interest -- for example carrying our grass snake population monitoring or conducting a census of the orchid population.

Health Londoners

This strand of work primarily consists of formal learning activities. At Hampstead Heath these focus on environmental education and expanding and developing our work with local primary and secondary schools. We will also pilot in the first year of the project a partnership with Camden Youth Services for young offenders to carry out reparation projects at Hampstead Heath, allowing them to gain useful conservation and land management skills through the scheme. This work would be expanded in the second and third years of the project. At Epping Forest educational activities are focused on improving wellbeing and encourage new people to visit the Forest, as well as formal learning sessions focused on the history of the site.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

New educational sessions delivered to more school children

A wider range of educational activities for all ages

New volunteer opportunities in active conservation and surveying work

Increased understanding of management aims through volunteer opportunities

Activities to encourage new visitors and volunteers to the sites

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Increase the number of school children accessing educational activities at Hampstead Heath and Epping Forest

Develop and broaden our range of education activities at Hampstead Heath and Epping Forest

Improve the understanding of volunteers of conservation aims and activities at Hampstead Heath and Epping Forest

Involve volunteers in a broader range of activities at Hampstead Heath and Epping Forest

Improve understanding of biodiversity at Hampstead Heath and Epping Forest through monitoring and surveying

Who will benefit?

About your beneficiaries

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

18,700,000

In which Greater London borough(s) or areas of London will your beneficiaries live?

Waltham Forest (35%)

Redbridge (35%)

Camden (20%)

Barnet (10%)

What age group(s) will benefit?

All ages

What gender will beneficiaries be?

All

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

A range of ethnic groups

If Other ethnic group, please give details:

What proportion of the beneficiaries will be disabled people?

1-10%

Funding required for the project

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

Expenditure heading	Year 1	Year 2	Year 3	Total
Healthy Trees	128,000	180,500	173,000	481,500
Healthy Ecosystems	176,000	146,000	165,000	487,000
Healthy Londoners	185,000	172,500	171,000	528,500
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	489,000	499,000	509,000	1,497,00
---------------	----------------	----------------	----------------	-----------------

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
---------------	----------	----------	----------	----------

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
	0	0	0	0
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	0	0	0	0
---------------	----------	----------	----------	----------

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Healthy Trees	128,000	180,500	173,000	481,500
Healthy Ecosystems	176,000	146,000	165,000	487,000
Healthy Londoners	185,000	172,500	171,000	528,500
	0	0	0	0
	0	0	0	0
	0	0	0	0

TOTAL:	489,000	499,000	509,000	1,497,00
---------------	----------------	----------------	----------------	-----------------

Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month: March	Year: 2013
-----------------------	---------------------	-------------------

Income received from:	£
Voluntary income	1,642,998
Activities for generating funds	0
Investment income	15,803
Income from charitable activities	729,268
Other sources	4,622,644
Total Income:	7,010,713

Expenditure:	£
Charitable activities	6,056,082
Governance costs	392,511
Cost of generating funds	0
Other	0
Total Expenditure:	6,448,593
Net (deficit)/surplus:	562,120
Other Recognised Gains/(Losses):	1,081
Net Movement in Funds:	563,201

Asset position at year end	£
Fixed assets	5,427,202
Investments	1,575,474
Net current assets	1,086,770
Long-term liabilities	42,750
*Total Assets (A):	6,471,222

Reserves at year end	£
Endowment funds	0
Restricted funds	29,035
Unrestricted funds	6,442,187
*Total Reserves (B):	6,471,222

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?
61-70%

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

No significant changes have occurred to the structure, financial position or core activities of either the Hampstead Heath Charitable Trust or the Epping Forest Charitable Trust.

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.

	2010 £	2011 £	2012 £
City of London (except City Bridge Trust)	5,804,677	4,313,121	4,622,644
London Local Authorities	0	0	0
London Councils	0	0	0
Health Authorities	0	0	0
Central Government departments	309,158	439,686	303,079
Other statutory bodies	0	0	0

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.

Name of Funder		2010 £	2011 £	2012 £
Heritage Lottery Fund	840,000	1,994,764		825,237
Football Foundation	34,532	12,946		11,375
Tubney Trust	66,238	0		0
	0	0		0
	0	0		0

Declaration

I confirm that, to the best of my knowledge, all the information I have provided in this application form is correct. I fully understand that City Bridge Trust has zero tolerance towards fraud and will seek to prosecute and recover funds in every instance.

Please confirm: Yes Full Name: **Jennifer Allott**

Role within **Departmental Business Manager**
Organisation: