

**The City Bridge Trust**  
**Investing In Londoners:**  
**Application for a grant**



**About your organisation**

Name of your organisation: <b>Ethical Property Foundation</b>	
If your organisation is part of a larger organisation, what is its name? <b>n/a</b>	
In which London Borough is your organisation based? <b>Hackney</b>	
Contact person: <b>Ms Antonia Swinson</b>	Position: <b>Director</b>
Website: <b>http://www.ethicalproperty.org.uk</b>	
Legal status of organisation: <b>Registered Charity</b>	Charity, Charitable Incorporated Company or company number: <b>1101812</b>
When was your organisation established? <b>01/01/2003</b>	

**Grant Request**

Under which of City Bridge Trust's programmes are you applying? <b>Strengthening London's Voluntary Sector</b>
Which of the programme outcome(s) does your application aim to achieve? <b>More organisations with improved skills in financial management</b>
Please describe the purpose of your funding request in one sentence. <b>Provide high quality property advice to London's voluntary sector to reduce property costs, risks and worry and enable organisations to focus on vital frontline work.</b>
When will the funding be required? <b>01/05/2014</b>
How much funding are you requesting? Year 1: <b>£49,710</b> Year 2: <b>£49,256</b> Year 3: <b>£48,442</b>  <b>Total: £147,408</b>

## **Aims of your organisation:**

Our aims are driven by our core beliefs:

We believe that buildings can be used to deliver financial, social and environmental returns.

Use of buildings should balance the interests of owners, managers, tenants, staff and the community.

Balancing the interests of all stakeholders in a building involves changing behaviour.

Balancing the interests of all stakeholders in a building challenges unequal power relations.

Challenging unequal power relations requires access to knowledge, resources and advice.

All involved with a building can work together as a positive force in society.

To this end our core aims are:

- 1 - to work proactively for a charity sector where no charity suffers reduced effectiveness due to lack of appropriate property support
- 2 - to work proactively for a commercial property sector driven by a triple (environmental, social and financial) rather than single financial bottom line.
- 3 - to continue developing with care and imagination as a sustainable, well run organisation, capable of creating lasting change.

## **Main activities of your organisation:**

### **1 - A Free Property Services for Charities**

Our Service was launched in 2006. We have since provided individual property advice to over 1,000 charities and community groups (736 charities in London saving more than £1.7m.) We have successfully helped them to rent, buy, let and manage property, empowering them to spend less time, money and worry on property issues, transforming buildings into assets that support frontline work.

We also offer in-depth consultancy which contributes to our sustainability.

### **2 - Research**

To deepen knowledge of charities' property concerns, we work in partnership with the Charity Commission, developing our annual Charity Property Matters survey; online resources plus a new property advice portal.

### **3 - Delivering high industry standards in the commercial property sector**

Since 2011, the Foundation, championed by charities, academics and property professionals, have developed the fairplace award -- a unique quality mark which recognises socially and environmentally responsible management of buildings. Successfully piloted, fairplace will be launched this summer.

## Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:
<b>3</b>	<b>3</b>	<b>7</b>	<b>80</b>

## 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?
<b>Leased</b>	<b>Ongoing, a rolling agreement</b>

## Summary of grant request

### 1 - Need

We are immensely grateful to the Trust for previous funding which helped establish our free London-wide Property Advice Service. There remains a fundamental and enduring lack of capacity within the sector, we are therefore seeking funding to maintain and increase this service from 100 to 150 client organisations p.a, with marketing support to ensure we maintain and deepen our reach in all 32 boroughs.

Funding cuts and changes in local borough policies on rent setting, non-domestic rates, asset transfers as well as community rights and the push to engage in public service delivery are the key factors creating a crushing need for charities to access our free quality property advice. We bring clarity to trustees and staff and prevent expensive mistakes which can lead to closure. We currently handle 100 cases p.a. and cannot satisfy demand.

We help evaluate property offerings, and work with borough property managers to understand the culture, constraints and language of the voluntary sector.

Since 2006, the Foundation has built a strong reputation as a trusted provider of property advice to small and medium sized charities. We have to date helped 736 London charities with individual support.

Our recent Charity Property Matters survey showed:

40% of charities consider their building is the greatest risk facing their organisation

40% found the cost and availability of professional advice a problem in the last 3 years.

Our prompt advice delivers a multiple of each grant pound: saving local projects from closure, enabling groups to raise new income from their premises, reduce property risks and enabling more people to access existing and new services.

### 2 - Delivery

We will deliver:

Tailored telephone advice and support e.g. site visits

Hands-on support to the least well-resourced groups, including those working in disadvantaged areas, with disabled people, and black and minority ethnic-led organisations.

A comprehensive free website with jargon-free, regularly updated information on finding, renting, buying and managing premises - from a charity perspective.

A Register of 35+ London Property Professionals including solicitors, surveyors, relocation and refurbishment experts and agents, who offer pro bono/discounted advice and services.

Marketing our service to a wide range of infrastructure and network organisations

A pilot training workshop tailored to non-property managers

In 2016 - a 10th Anniversary celebration of the London Property Advice Service

### 3 - Aims

Over the three years our London Property Advice Service aims to:

- \* support 450 small & medium charities and community groups. Calculating at a conservative 100 stakeholders per organisation this would benefit 45,000 Londoners
- \* Market proactively to networks and organisations across London to deepen our reach
- \* Create vibrant online support for 570 registered London organisations

Our Service will be delivered by our current team with 35+ years' combined property experience. We will also recruit a Senior Property Adviser. Marketing will be undertaken by the Director and Marketing Co ordinator.

The Foundation offers a unique and comprehensive service, combining passion for charities with practical commercial property knowledge.

#### Strengthening London's Voluntary Sector

Our work improves the financial management and planning skills of staff and trustees through better understanding of property costs, risks, waste, and increased confidence in working with professionals.

#### 'Principles of Good Practice'

- We track cascade benefits through six monthly client surveys which show savings made and income generated.
- Feedback on our training, 6 monthly surveys, independent client follow up, equip us for continuous improvement e.g. updating online resources.
- We improve access to our services through network marketing, exhibiting at conferences, and tailoring services to need
- We share learning across the wider sector -- collaborating with key partners e.g. the Charity Commission

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

**n/a**

Do you have a Vulnerable Adults policy? **No**

What Quality Marks does your organisation currently hold?

## 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.

**Our London Property Advice team will deliver tailored property advice for 450 voluntary organisations. This includes telephone, face to face and written advice as well as site visits and client surgeries.**

**Refer 87 London based voluntary organisations over three years for pro bono or discounted professional support via our Register of London Property Professionals - which include valuers, project managers, solicitors and surveyors.**

**Provide on-line information resources to 570 London based voluntary organisations over three years through our website support, which will include regularly updated resources.**

**Work with City Bridge Trust to pilot a 'Property Management for Non Property Managers' workshop for 25 City Bridge Trust grantholders and selected participants drawn from across London.**

**Market our activities to London's third sector with a full marketing charity2charity communications plan including quarterly newsletters, articles in the charity press, extensive of social media, speeches/appearances at London charity events plus a 10th Anniversary celebration of the London Property Advice Service in 2016.**

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.

**We will save these 450 organisations around £261,000 in avoidable property and organisational costs. The savings in staff stress, lost organisational capacity and other personal consequences are harder to quantify, but we know from our surveys, these are very real off balance sheet realities.**

**We will save at least 87 client organisations around £175,500 in professional fees through referrals to our Register of committed property professionals.**

**We will help 450 organisations generate £513,000 in new finance and income.**

**Through marketing across London we will expand the reach of our services and ensure we hit and preferably exceed our property advice service targets.**

**Through offering free 'Property Management for non Property Managers' training for City Bridge Trust grant holders, we will equip 25 senior managers & trustees to understand the complex role property plays in their organisational development; questions to ask stakeholders and suppliers and how to access support.**

Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to sustain it? If not, what is your exit strategy?

**Yes. We are working diligently to diversify income: building a consultancy portfolio, planning sponsorship packages and developing our industry standard fairplace award which will be launched later this year. However to continue to give quality, detailed free property advice to London's smallest and most vulnerable charities, we will always require some element of grant funding.**

## Who will benefit?

### About your beneficiaries

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

**15,000**

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

**London-wide (100%)**

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
Property Advice Service team salaries & related costs	35,250	35,276	36,335	106,861
Marketing - staff salaries & related costs	6,753	6,956	7,164	20,873
Marketing costs - photography, webinars, events & publications	5,600	4,738	4,880	15,218
Office overheads	10,251	10,558	10,875	31,684
Web hosting and development	4,456	4,590	4,727	13,773
Travel and subsistence	1,000	1,030	1,061	3,091
Staff training	900	900	900	2,700
	0	0	0	0
	0	0	0	0

<b>TOTAL:</b>	<b>64,210</b>	<b>64,048</b>	<b>65,942</b>	<b>194,200</b>
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### What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
Trust for London	12,500	7,292	0	19,792
Consultancy Income (to be raised)	2,000	5,000	15,000	22,000
Sponsorship Income (to be raised)	0	2,500	2,500	5,000
	0	0	0	0

<b>TOTAL:</b>	<b>14,500</b>	<b>14,792</b>	<b>17,500</b>	<b>46,792</b>
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### 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

<b>TOTAL:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
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### How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
Property Advice Service team salaries & related costs	22,750	27,984	26,830	77,564
Marketing - staff salaries & related costs	4,753	5,147	5,230	15,130
Marketing costs - photography, webinars, events & publications	5,600	3,506	3,562	12,668
Office overheads	10,251	7,813	7,939	26,003
Web hosting and development	4,456	3,397	3,450	11,303
Travel and subsistence	1,000	762	774	2,536

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Staff training	900	647	657	2,204
	0	0	0	0
	0	0	0	0
<b>TOTAL:</b>	<b>49,710</b>	<b>49,256</b>	<b>48,442</b>	<b>147,408</b>



## Finance details

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

Financial year ended: 30	Month: September	Year: 2013
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Income received from:	£
Voluntary income	
Activities for generating funds	206,505
Investment income	734
Income from charitable activities	73,175
Other sources	
<b>Total Income:</b>	<b>280,414</b>

Expenditure:	£
Charitable activities	210,050
Governance costs	17,010
Cost of generating funds	23,338
Other	
<b>Total Expenditure:</b>	<b>250,398</b>
<b>Net (deficit)/surplus:</b>	<b>30,016</b>
<b>Other Recognised Gains/(Losses):</b>	<b>0</b>
<b>Net Movement in Funds:</b>	<b>30,016</b>

Asset position at year end	£
Fixed assets	
Investments	
Net current assets	157,411
Long-term liabilities	
<b>*Total Assets (A):</b>	<b>157,411</b>

Reserves at year end	£
Endowment funds	
Restricted funds	25,484
Unrestricted funds	131,927
<b>*Total Reserves (B):</b>	<b>157,411</b>

\* 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? 1-10%
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### Organisational changes

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

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

	2012 £	2013 £	2014 £
City of London (except City Bridge Trust)	0	0	0
London Local Authorities	0	0	0
London Councils	39,000	39,295	39,000
Health Authorities	0	0	0
Central Government departments	0	0	0
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	2012 £	2013 £	2014 £
Esmee Fairbairn Foundation	20,000	37,500	61,250
Tudor Trust	30,000	22,500	30,000
Big Lottery Basis	23,436	22,087	28,001
Trust for London	12,083	14,500	14,500
Woodlark Trust	0	11,181	23,819

## 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: **Antonia Swinson**

Role within                      **Director**  
Organisation: