

<b>Committee:</b>	<b>Date:</b>
The City Bridge Trust Committee	28 <sup>th</sup> January 2015
<b>Subject:</b> Progress Report	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>
<b>Summary</b>	
<p>This is a regular Progress Report by the Chief Grants Officer.</p> <p><b>Recommendations:</b></p> <p>(i) that delegated authority be given to the Chief Grants Officer to inform unsuccessful stage one applicants to the Stepping Stones Fund that they have been rejected;</p> <p>(ii) that a list of Committee meeting themes be agreed; and</p> <p>(iii) that a decision be reached on the use of the Central Risk underspend, prior to considering the grants applications before you today.</p>	

### **Main Report**

#### **The Work Continues**

1. Your Chief Grants Officer and Mrs Littlechild went on the first Friday grantee visit of the year last week to the charity Fareshare: [www.fareshare.org.uk](http://www.fareshare.org.uk)
2. Fareshare takes surplus food and redistributes it around the country, through its 20 regional centres, where it is used by partner charities, to help feed those who need it. Your grant is to expand the London operation.
3. The visit was to the main London food distribution centre which is co-located within the head office. Your Chief Grants Officer and Mrs Littlechild donned high-visibility jackets and viewed the impressive operation: food is received from many different suppliers, from Asda to Borough Market, and then volunteer teams support paid staff in sorting, order picking, and driving the food to frontline charities or local distribution centres. The charities pay a processing fee, dependant on the amount of food received, but this is significantly below food cost. The project has benefits on many levels: reducing food waste; creating volunteering and employment opportunities; saving charities money and enabling them to give food to those who need it.

## **Fit for Purpose**

4. Building on the officer and Committee Members away half day and informed by the Grantee Perception survey, your CBT team will be working, with the support of external consultants Lasting Transformation, to review and improve its operation. This will include considering the end to end grant making process, drawing on good practice examples from others; considering how the social investment work, and the work to increase philanthropy, can be better integrated with the grant-making; looking back over successes and failure of the last 20 years to inform our future work; and setting up an information management strategy, and shared learning programme, to support better learning and collaboration between CBT and grantees.
5. This will take place over the next 3 months and the results will be reported to your May Committee.

## **Moving On Up**

6. In September 2014, you approved a grant of £400,000 to co-fund, with Trust for London (TfL), an initiative aimed at increasing employment rates amongst young black men. This initiative, called Moving On Up, followed research and census data which showed that the unemployment rate for this cohort was more than double that of young white men. A total of £875,000 over two years was made available for grants.
7. Organisations then were invited to apply for funds to address one or more of the following:
  - Projects that wanted to develop new ways of supporting young black men into employment. This could be a completely new model or an extension of current work.
  - Projects that could demonstrate successful employment outcomes for this target group and which, with further investment, had the potential to influence mainstream employment programmes.
  - Projects that created new pathways into employment and which created new opportunities to gain work experience and skills.
8. 49 applications were received. These were considered by a shortlisting panel comprising officers from CBT and TfL; and Black Training & Enterprise Group (the authors of the research). 10 organisations were shortlisted and subsequently visited for an in-depth assessment by officers from TfL and CBT.
9. Following this process, a decision panel (comprising your Deputy Chairman and Mr Edward Lord, as well as two trustees from TfL) met on 26<sup>th</sup> November to consider the allocation of the funds. This panel was attended by officers in an advisory capacity.

10. The two-year grants outlined in the table below were agreed. The funding for internships is to support each successful organisation employing (on London Living Wage) a young person as an intern.
11. All shortlisted organisations have been informed of the decisions. Successful projects will be expected to commence in early 2015 and to have undergone training together in bespoke monitoring and evaluation systems, so that they are working to common aims and utilising common frameworks wherever possible.

Name of Organisation	Borough	Target Employment Outcomes	Amount Requested	Amount Recommended
Action Acton Elevations Network	Brent/Ealing	75	£120,078	£120,100
Hackney Council for Voluntary Service	Hackney	60	£118,220	£118,230
London Youth	Lambeth/Croydon	50	£118,739	£119,000
Making the Leap	London-wide/Brent	50	£113,036	£113,040
Step Ahead	Southwark/Lambeth/Lewisham/Newham	150	£147,672	£147,680
Internship Programme				£105,000
Project Support				£19,950
<b>TOTAL</b>			<b>£1,346,246</b>	<b>£875,000</b>

## Communications

12. Since your last meeting, the following media coverage has been achieved by the media team of the Public Relations Office:

Charity	Publication	Circulation	Links	Reach
Positive East	Docklands and East London Advertiser	7,859	<a href="W:\File Transfer\Morning Media Briefing\05.01.14\Docklands and East London Advertiser.pdf">W:\File Transfer\Morning Media Briefing\05.01.14\Docklands and East London Advertiser.pdf</a>	East London including Tower Hamlets
Enfield Citizens Advice Bureau	This is local London		<a href="http://www.thisislocallondon.co.uk/news/11683908.Advice_bureau_welcomes_130_000_grant/?ref=rss">http://www.thisislocallondon.co.uk/news/11683908.Advice_bureau_welcomes_130_000_grant/?ref=rss</a>	London-wide
	Enfield Independent	58,131	<a href="http://www.enfieldindependent.co.uk/news/11683908.Advice_bureau_welcomes_130_000_grant/">http://www.enfieldindependent.co.uk/news/11683908.Advice_bureau_welcomes_130_000_grant/</a>	Enfield
Prince's Trust	Philanthropy Impact		<a href="http://www.philanthropy-impact.org/news/city-bridge-trust-approves-extra-funding-support-princes-trust">http://www.philanthropy-impact.org/news/city-bridge-trust-approves-extra-funding-support-princes-trust</a>	UK charitable sector
Havering and Brentwood Bereavement Service	Romford Recorder	21,448	<a href="http://www.romfordrecorder.co.uk/news/funding_boost_for_bereavement_charity_to_deal_with_rise_in_numbers_1_3906175">http://www.romfordrecorder.co.uk/news/funding_boost_for_bereavement_charity_to_deal_with_rise_in_numbers_1_3906175</a>	Havering-wide
	Brentwood Weekly News	14,544	<a href="http://www.brentwoodweeklynews.co.uk/news/11705456_40_000_grant_for_charity_supporting_bereaved_children/">http://www.brentwoodweeklynews.co.uk/news/11705456_40_000_grant_for_charity_supporting_bereaved_children/</a>	Brentwood
	Yellow Advertiser (Havering)		<a href="http://www.yellowadvertiser-today.co.uk/news.cfm?id=20633&amp;headline=Magnificent_bereavement_charity_recognised">http://www.yellowadvertiser-today.co.uk/news.cfm?id=20633&amp;headline=Magnificent_bereavement_charity_recognised</a>	Havering
Norwood	Get West London	250,000	<a href="http://www.getwestlondon.co.uk/news/local-news/jewish-charity-gets-121000-boost-8398822">http://www.getwestlondon.co.uk/news/local-news/jewish-charity-gets-121000-boost-8398822</a>	Across West London
	Jewish News	30, 110	<a href="http://www.jewishnews.co.uk/norwood-given-120000-boost-new-disability-sports-programme/">http://www.jewishnews.co.uk/norwood-given-120000-boost-new-disability-sports-programme/</a>	Jewish Community in Greater London
	Harrow Times	39, 937	<a href="http://www.harrowtimes.co.uk/news/11714715.Sports_programmes_get_boost_after_charity_donation/">http://www.harrowtimes.co.uk/news/11714715.Sports_programmes_get_boost_after_charity_donation/</a>	Harrow
	This is local London		<a href="http://www.thisislocallondon.co.uk/news/11682698.Grant_to_help_people_with_learning_disabilities_take_part_in_sport/">http://www.thisislocallondon.co.uk/news/11682698.Grant_to_help_people_with_learning_disabilities_take_part_in_sport/</a>	London-Wide
Buttle UK	Evening Standard (Letter from Chairman Jeremy Mayhew)	824,500	<a href="http://www.standard.co.uk/comment/letters/letters-to-the-editor-main-parties-sums-dont-add-up-9976075.html?origin=internalSearch">http://www.standard.co.uk/comment/letters/letters-to-the-editor-main-parties-sums-dont-add-up-9976075.html?origin=internalSearch</a>	London-wide

13. At your last meeting, Members asked for statistics relating to visitors to the Trust's website.
14. During the six months ended 31<sup>st</sup> December 2014 there were 16,982 visitors to the CBT website, who initiated a total of 23,344 sessions (ie some visitors visiting the website more than once during a month). These sessions resulted in 108,801 individual page views. 70% of visits to the site originated from within greater London.
15. The breakdown, below, reveals a consistent flow of visitors to the site numbering approximately 3,000 per month with slight reductions during the summer holiday period and in December.

<b>Month 2014</b>	<b>Number of visitors</b>	<b>Number of sessions</b>	<b>Number of page views</b>
July	2,911	4,061	19,451
August	2,633	3,549	17,286
September	2,749	3,760	18,804
October	2,977	4,025	18,689
November	3,067	4,167	18,513
December	2,645	3,782	16,058
<b>Total</b>	<b>16,982</b>	<b>23,344</b>	<b>108,801</b>

In the same period, the five most popular pages were as follows:

<b>Web page</b>	<b>Number of views</b>
1 Grants and payments	14,574
2 Home page	13,363
3 Investing in Londoners	6,428
4 Recent grants awarded	6,318
5 How to apply for a grant	5,305

### **Ethical Property Foundation Charity Property Matters Survey 2014**

16. The Deputy Chief Grants Officer attended the launch of the Ethical Property Foundation's 2014 Charity Property Matters Survey, launched at RICS by Charity Commission CEO, Paula Sussex, and sponsored by Copping Joyce. You are currently funding the Ethical Property Foundation's London Property Advice Service.
17. The survey, which is the only study that asks charities specifically about property matters, was completed by 300 respondents. The results showed that many charities find property issues challenging:
  - 45% charities surveyed said their property posed the greatest risk to their long term survival (up 4% on 2012 figures);
  - one-third of charities had not paid for any property advice in the last three years; and
  - a further 40% relied on informal advice from friends and contacts.

18. The survey also revealed the twin challenges of limited property knowledge and soaring property costs in a competitive market:
- 30% of charities surveyed said that, in the past three years, it had been a significant challenge to find a suitable property;
  - 30% of respondents did not feel they had the expertise to be effective when seeking advice on issues such as rent reviews, lease renewals and negotiations;
  - Almost half (48%) of respondents did not feel they had the expertise to seek new premises; and
  - over 20% had experienced difficulties renting at an affordable price.

### **Stepping Stones Fund**

19. The Stepping Stones Fund, your new grants programme for charities starting to explore the social investment market, was launched on 24 November 2014. Since then, CBT has had a healthy number of enquiries about the programme, and there is every reason to believe that you will receive some high-quality applications from organisations seeking support with their plans to access new revenue streams.
20. Given that the total funds available for the first year of Stepping Stones are £1m, and given that it is expected to be a popular programme, it is anticipated that there will be a relatively high number of unsuccessful applicants. As such, officers have designed the application process to ensure that the level of documentation required from charities is proportionate to the application stage they reach.
21. The first stage is an online eligibility quiz to check whether the applicant meets CBT's basic criteria. Successful completion of the quiz is required before organisations can then access the Stepping Stones Fund application form.
22. The second stage is an application form, similar to those used for your other Investing in Londoners programmes, with some supporting documentation such as financial statements, organisational constitution and budget projections. The deadline for submission of these application forms is 31<sup>st</sup> January 2015.
23. Officers will then shortlist around 40 applications, and invite these organisations to develop their proposals further, and to attend a personal interview (the third stage). This stage will run between March and April. Final recommendations will be made to your meeting on 13<sup>th</sup> May 2015.
24. **You do not have a February meeting, and officers are keen to ensure that those organisations who are not shortlisted at the second stage in late January are not kept waiting for a decision on their proposal. You are asked to give delegated authority to the Chief Grants Officer to inform unsuccessful stage one applicants that they have been rejected. These organisations would, as with all of your programmes, be informed that they could seek feedback on their application from the Trust.**

## Committee Meeting Themes

25. It was agreed that each of the Committee meetings going forward would be themed to enable a 'deep dive' into a particular policy area to inform greater strategic discussion.
26. The following themes are proposed for Committee meetings scheduled to January 2016:
  - March 2015 – Strengthening London's voluntary sector
  - May 2015 – Making London more inclusive
  - July 2015 – Improving Londoners' mental health
  - September 2015 – Older Londoners
  - November 2015 – Improving London's environment
  - January 2016 – Specialist advice and support services (to include those delivered through the 'Reducing Poverty', 'Resettlement and Rehabilitation of Offenders' and 'Making London Safer' programmes).
27. **You are invited to consider these, discuss them at Committee, and decide on a final list.**

## Funding Your Grants

28. Your Investing In Londoners programmes are now well-established. Later in your papers, in the 6 monthly statistics report, you will see the analysis of the grant-making you have done against the agreed criteria.
29. The quality of the applications to your programmes has improved over the last year, and Investing in Londoners is attracting considerable interest. It is anticipated that the demands on CBT's grant-making resources will increase over the coming 12 month as the impact of further cuts are experienced in communities across London, and the not-for profit organisations working in those communities are likely to have access to fewer resources and increased demand on their services.
30. You will recall that your 2015-2016 grants budget (including write backs and revocations) is £15,099,345. Following the November 2014 CBT Committee, you had made grants across the Investing in Londoners programmes such that the balance of the grants budget available for spending to date is £2,072,863.
31. The total value of grants applications before you at the this January 2015 CBT Committee is £3,191,990, representing a full commitment of the baseline grant budget for 2014-15, plus an additional £1,119,127. You have one CBT Committee remaining for 2014-15, on 12<sup>th</sup> March. You will recall that your total funds available for grant-making for 2014-2016 was increased in September 2014, by agreement of the Chamberlain in consultation with the Chairman and Deputy Chairman of the Resource Allocation Sub Committee, by £3,539,000. This represented the carry forward from your Central Risk grants budget from previous years (resulting largely from the diversion of resources away from

grant-making to the quinquennial review and transition to your new grants programme). The carry forward was agreed on the basis that several areas of important work could be resourced from this underspend and the Town Clerk proposed to carry forward the Central Risk underspend to be distributed as grants in 2014-15.

32. In line with this agreement, you are invited to consider the use of this Central Risk underspend (i.e. the 2013-14 carry forward). Options open to you include the following:
- (a) To agree that none of the 2013-14 carry forward should be used for applications made to your Investing In Londoners programmes in 2014-15, and instead should be considered solely for strategic initiatives relating to your 20th Anniversary to be agreed at your March 2015 Committee meeting;
  - (b) To agree that all the 2013-14 carry forward should be used for applications to your Investing In Londoners programmes in 2014-15 and any strategic initiatives relating to your 20th Anniversary should come out of your 2015-2016 baseline grants budget;
  - (c) To agree that a proportion of the 2013-14 carry forward should be used for applications to your investing In Londoners programmes (including those before you at this January 2015 meeting), and a proportion be used for strategic initiatives relating to your 20th anniversary to be considered at your March 2015 meeting
33. **It is recommended that the above options are discussed at this meeting and a decision reached prior to considering the grants applications before you today.**
34. Given the demands on your Investing in Londoners programmes and officers knowledge of applications in the system, it is anticipated that approximately £2M in further applications could be brought to your March 2015 Committee meeting. However, depending on the outcome of the discussion above, some (or all) of these applications could be held over to your May 2015 meeting.
35. The figures referred to in this sub-section may be cross-referenced with the Grant Applications Statistical Report which appears later in your papers.

David Farnsworth, Chief Grants Officer  
020 7332 3713  
[david.farnsworth@cityoflondon.gov.uk](mailto:david.farnsworth@cityoflondon.gov.uk)  
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