



**Executive**  
27<sup>th</sup> May 2008

**Report from the Director of  
Housing and Community Care**

Wards Affected:  
None

**Edward Harvist Trust Fund Criteria**

Forward Plan Ref: n/a

**1.0 Summary**

- 1.1 This report seeks Members approval to revise the local criteria used to assess applications for the Edward Harvist Trust, and also to increase the funding available to individual organisations. The amendments are requested following the decision made at Executive on 18 March 2008 to transfer organisations previously funded by the Council's Main Programme Grant to the Edward Harvist Trust funding programme.
- 1.2 If the proposal is accepted the new criteria will be effective from May 2008, when the first round of the grant for 2008/09 will be advertised.

**2.0 Recommendations**

Members are asked to:

- 2.1 Approve the revised local criteria for which applications for funding from the Edward Harvist Trust are considered. The revised criteria are set out in Appendix A of this report.
- 2.2 The following are the changes being recommended to the current criteria that were agreed by the Executive on 13 September 2006.

Add to paragraph (b)	The grant will be awarded for expenses made after the Council approves funding, any expenses incurred prior to approval will be the responsibility of the organisation.
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Revise paragraph (g)	The maximum grant payable is up to £7,000 for each project subject to the resources held by the fund.
Revise paragraph (h)	In order to encourage new applications organisations that received funding within the first round of the financial year will not be considered in the second round.

### 3.0 Detail

- 3.1 The Edward Harvist Trust dates back to 1610 when it was first established to maintain the Edgware Road. Five Boroughs (Brent, Barnet, Camden, Harrow and the City of Westminster) receive income from the Trust proportionate to the length of the Edgware Road passing through their respective areas. The London Borough of Harrow acts as Administrator of the Trust and is responsible for distributing the income to the other participating boroughs. All 5 boroughs receive income from the fund twice a year. Brent Council receives approximately £40,000 each year from the fund, but this amount will vary depending on the amount for allocation by the Fund.
- 3.2 The object of the charity is to further 'relief of aged and poor inhabitants, relief of distress and sickness, provision and support of education and recreation and other leisure time activities.' The Council is required to spend the funding received for the purposes of achieving this objective, but subject to that can determine the criteria for making grants from it. Over the years the grant has mainly been awarded for one-off capital expenditure such as the purchase of equipment or other non-recurring expenditure such as summer playschemes, outings, faith and cultural events organised by local voluntary organisations throughout the year.
- 3.3 The Voluntary Sector Team has administered the Fund for some time and currently it is allocated in two rounds each year. The first round is in June/July for summer activities and the second round is advertised in October/November for winter activities.
- 3.4 Although the grant is widely advertised by the Team, the number of applications received from voluntary organisations has fallen over the last few years, and as a result the Council has built up a large surplus in the Edward Harvist Trust budget.
- 3.5 The Executive met on 18 March 2008 to consider allocations of Main Programme Grant 2008/09 and it was agreed that the funding for nine organisations should be transferred from Main Programme Grant funding to Edward Harvist Trust funding either in full or in part. Several of these groups currently receive funding over the maximum limit of £5,000 currently awarded for the Edward Harvist Trust.
- 3.6 The Executive approved the current criteria for the Edward Harvist Grant on 13 September 2006 (see Appendix B). In order to transfer organisations previously funded by Main Programme Grant to Edward Harvist Trust, and to enable those organisations to continue to receive the same level of funding, the following changes to the exiting criteria are proposed.

- Extend paragraph b, relating to purpose of the grant to ensure it covers costs incurred after the Council approves the grant and not expenses sustained prior to approval. This will ensure the fund is allocated appropriately and used according to the terms agreed by the Council.
- Amend paragraph g, increase the funding limit from £5,000 to £7,000. This will encourage new applications utilise, the current surplus in the budget, and increase the funding opportunities in the borough.
- Delete paragraph h, which currently excludes organisations from receiving the grant in successive years, and add a new criterion that will allow organisation to apply each year, either in the first or second round.

3.7 The above amendments are set out in the revised criteria attached as Appendix A of this report. Officers are seeking member's approval to implement the new criteria in May 2008, when the first round of the grant will be advertised.

#### 4.0 Financial Implications

4.1 There is currently £101,869.83 in the Edward Harvist Trust budget and this does not include monies the Council will receive for the final distribution for 2007/08.

4.2 However it is estimated that the annual income to Brent Council from this Fund is approximately £40,000 per year

4.3 The table below shows the resources available for distribution in 2008/09

	£
Balance as at the 1 <sup>st</sup> April 2007	86,402.58
Additional grants received in the year	63,972.25
Amount paid out in 07/08	48,405
<b>Balance available for allocation in 2008/09</b>	<b>101,869.83</b>

4.4 If the criteria are not approved the Council may continue to carry forward large surpluses. Members should note that any surplus accumulated by the Authority cannot be utilised for Council purposes and is restricted to the aims specified by the Charity.

4.5 Approving the proposed delegation to the Director of Housing and Community Care and the proposed allocation criteria will enable grant awards to be made. Allocations of grant will be made from within the available budget and the nature of the awards does not commit the Council to on-going funding.

## 5.0 Legal Implications

To be considered for the Edward Harvist Fund organisations must satisfy the objects of the Edward Harvist Trust and , in addition, the local criteria approved by the Executive as well as the Council's Standard Conditions of Grant Aid,.

## 6.0 Diversity Implications

- 6.1 To be considered for the Edward Harvist Fund organisations must meet the funding criteria set by the Funders as well as the Council's criteria for funding and the Standard Conditions of Grant Aid.
- 6.2 Edward Harvist Trust funding can be significant in assisting local voluntary organisations in meeting the need of our diverse community. Funding is potentially available to agencies working across the full range of diversity issues and with disadvantaged members of the community.
- 6.3 Each organisation which is recommended to receive Edward Harvist Trust funds are required to provide a copy of the Equal Opportunities policy to council officers before funding is released.

## 7.0 Staffing Implications

- 7.1 There are no staffing implications arising from this report

### Background Papers

- Appendix A – Edward Harvist Trust Funding Criteria – May 2008
- 5.1 Appendix B – Current Funding Criteria as approved by the Council in September 2006

### Contact Officers

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Director of Housing and Community Care



## APPENDIX A

### London Borough of Brent Housing & Community Care

## CRITERIA FOR THE EDWARD HARVIST TRUST FUND

### BACKGROUND

The Edward Harvist Charity was established in 1610 from the estate of a prominent local land owner Edward Harvist. The original purpose of the charity was to maintain 2 roads in North West London, the Edgware Road and Harrow Road. This responsibility was passed to Local Authorities and the Charity and its purpose were revised to assist the sick and elderly people living in the boroughs bordering the two roads e.g. Barnet, Brent, Camden, Harrow and the City of Westminster.

The London Borough of Harrow administers the funds on behalf of the Trust and Brent receives 28% of the annual income. The fund is then distributed to voluntary organisations in Brent that meet the following purposes.

The objects of the Trust as stated in the Trust deed is to further:

1. The relief of the elderly and poor inhabitants of the London Borough of Brent (and other Boroughs);
2. The relief of distress and sickness among the said inhabitants;
3. The provision and support of facilities for recreation and other leisure time occupation;
4. The provision and support of education facilities for the said inhabitants;
5. Any other charitable purpose.

In addition to the above criteria the following will apply to grants from the Trust:

- a. The organisation must be based in Brent and/or provide services for people living in Brent.
- b. The Grant will be awarded for one-off expenditure or expenditure of a non-recurrent nature such as furniture, equipment, outings and costs relating to one off events. Requests for ongoing commitment such as salaries, rent and annual running costs will not be considered. The grant will be awarded for expenses made after the Council approves funding, any expenses incurred prior to approval will be the responsibility of the organisation.
- c. Organisations must be financially viable, have a good management structure and the ability to deliver quality services to the diverse communities in Brent.
- d. Organisations must submit a clear explanation of their proposed project in their application.
- e. All projects/activity must be completed by the end of the financial year for which the grant is given and all funds must be claimed by the end of the financial year. For the purpose of the Fund the financial year will be from the 1<sup>st</sup> April to 31<sup>st</sup> March the following year.
- f. Payment of the grant will be made in arrears i.e. organisation's must first incur the expenditure and then submit the relevant receipts before the grant is paid.
- g. The maximum grant payable is up to £7,000 for each project subject to the resources held in the Fund.
- h. In order to encourage new applications organisations that received funding within the first round of the financial year, will not be considered for the Fund **in the second round**.
- i. The purpose of this grant is to 'top-up' funds already raised by organisations and therefore, organisations **must contribute up to 30%** towards the proposed project and must provide evidence of their contribution with their application.
- j. All organisations must comply with the London Borough of Brent's Standard Conditions of Grant Aid.
- k. If funding is approved, organisations will be expected to submit a short evaluation report of the project to the Council by the end of

the financial year. The report should detail how the grant was used, outcomes and achievements.

- I. Please note that if your application is successful, the grant must be used for the purpose it was approved. The Council reserves the right to withdraw or reclaim part or whole of the grant awarded in event of the organisation failing to carry out the work for which the grant was awarded or failing to carry out the project within the financial year.

**May 2008**



## APPENDIX B

### London Borough of Brent Housing & Community Care

## CRITERIA FOR THE EDWARD HARVIST TRUST FUND

### BACKGROUND

The Edward Harvist Charity was established in 1610 from the estate of a prominent local land owner Edward Harvist. The original purpose of the charity was to maintain 2 roads in North West London, the Edgware Road and Harrow Road. This responsibility was passed to Local Authorities and the Charity and its purpose were revised to assist the sick and elderly people living in the boroughs bordering the two roads e.g. Barnet, Brent, Camden, Harrow and the City of Westminster.

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- d. Organisations must submit a clear explanation of their proposed project in their application.
- e. All projects/activity must be completed by the end of the financial year for which the grant is given and all funds must be claimed by the end of the financial year. For the purpose of the Fund the financial year will be from the 1<sup>st</sup> April to 31<sup>st</sup> March the following year.
- f. Payment of the grant will be made in arrears i.e. organisation's must first incur the expenditure and then submit the relevant receipts before the grant is paid.
- g. The maximum grant payable is up to £5,000 for each project subject to the resources held in the Fund.
- h. In order to encourage new applications organisations who have received Edward Harvist funding within the last 12 months i.e. funded in the last financial year, will not be considered for the Fund.
- i. The purpose of this grant is to 'top-up' funds already raised by organisations and therefore, organisations **must contribute up to 30%** towards the proposed project and must provide evidence of their contribution with their application.
- j. All organisations must comply with the London Borough of Brent's Standard Conditions of Grant Aid.
- k. If funding is approved, organisations will be expected to submit a short evaluation report of the project to the Council by the end of the financial year. The report should detail how the grant was used, outcomes and achievements.
- l. Please note that if your application is successful, the grant must be used for the purpose it was approved. The Council reserves

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**October 2006**