

Report of the Strategic Director of Children's Services to the meeting of Regulatory and Appeals Committee to be held on 29th February 2024

Subject:

The Charles Semon Educational Foundation Trust and the allocation of grant funding.

Summary statement:

This report provides an update on the current position and intended grant allocations from The Charles Semon Educational Foundation Trust.

Established in 2003, following sale of a convalescent home and associated land, the income generated from this sale, as stipulated in the deeds of the then owners, was split between Bradford Girls School, Bradford Grammar School and the Local Education Authority. This report focuses on the Local Education Authority element of the fund.

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Overview & Scrutiny Area:
Regulation and Appeals Committee

1. SUMMARY

- 1.1 This report provides an update on the current position and intended grant allocations from The Charles Semon Educational Foundation Trust.

Established in 2003, following sale of a convalescent home and associated land, the income generated from this sale, as stipulated in the deeds of the then owners, was split between Bradford Girls School; Bradford Grammar School and the Local Education Authority. This report focusses on the Local Authority element of the fund.

2. BACKGROUND

- 2.1 City of Bradford Metropolitan District Council are Trustees of The Charles Semon Educational Foundation Trust (Charity Number 1095912). The Trustee function is devolved to the Regulatory and Appeals Committee of the Council.

- 2.2 The object of the foundation is to promote the education of persons who:

1. Are under the age of 25 and
2. Are in need of financial assistance and
3. Are resident in the area of benefit (defined as Bradford Metropolitan District) and
4. Have attended, at any time, as a pupil of any school within the area of benefit.

The proposals outlined in this report fully align and further the charitable purposes of The Charles Semon Educational Foundation Trust.

- 2.2 The Charles Semon Educational Foundation Trust has previously looked to allocate grant funding from income from investments and interest on bank balances. However, for a number of years (in part due to Covid), the Trust was not able to allocate grant funding, so the income has accumulated resulting in an increased amount of funds being available for use in this financial year (2023-24) and the next financial year (2024-25), after which the funds available each financial year will reduce.
- 2.3 The delay in the allocation of grant funding of The Charles Semon Educational Foundation Trust has been communicated to The Charity Commission, who recognised the impact of Covid and of the need for a recovery period. The Charity Commission acknowledged the pause in grant allocations and agreed to review grant allocations within the next 12 months to ensure we are bringing this back on track.
- 2.4 There has been a long-standing intention to allocate grant funding to further the opportunities for young people who had in some way been disadvantaged in education and who had missed mainstream opportunities, ensuring these young people are given priority in the delivery of activity provided under the allocation of this funding.

EQUALITY & DIVERSITY:

The allocation of grant funding from The Charles Semon Educational Foundation Trust, whilst complying with the charity objectives, will ensure, demonstrate, and have due regard to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by or under the Equality Act 2010
- Reduce inequalities in educational attainment
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it
- Foster good relations between people who share a relevant protected characteristic and persons who do not share it

3. OTHER CONSIDERATIONS

3.1 There are no other considerations in relation to this grant funding allocation.

4. FINANCIAL & RESOURCE APPRAISAL

4.1 The total net assets of The Charles Semon Educational Foundation Trust as at 31.03.2023 were £714,982.81, including accrued income from investments and interest on bank balances of £312,672.08.

The income from investments and interest on bank balances accrued in the period from 31.03.2004 to 31.03.2023 was £256,702.84, and further income from investments and interest on bank balances will be received in 2023-24 and 2024-25.

The proposal for the allocation of grant funding that is included in Appendix A outlines total expenditure of £85,099 for the financial year 2023-24 and £83,000 for the financial year 2024-25.

5. RISK MANAGEMENT AND GOVERNANCE ISSUES

5.1 There is no significant risk arising out of the allocation of grant funding from the Trust Fund to local organisations.

6. LEGAL APPRAISAL

6.1 The Trustees will need to be satisfied that the applications to the trust are being awarded in the best interest of the Trust and offer value for money.

In addition, the Trustees must consider the proposal in terms of what is in the best interests of the charity. The Charity Commission Guidance (The essential trustee: what you need to know, what you need to do”, Updated 3 May 2018) advises that “Acting in the charity’s best interest means always doing what the trustees decide will best enable the charity to carry out its purposes, both now and for the future.”

The object of the charity is: to promote the education of persons who are under the age of 25; and are in need of financial assistance; and are resident in the area of

benefit (defined as “Bradford Metropolitan District”); and have at any time attended, as a pupil, any school within the area of benefit.

7. OTHER IMPLICATIONS

7.1 SUSTAINABILITY IMPLICATIONS

7.1.1 There are no issues for sustainability from the allocation of grant funding from the Trust Fund.

7.2 TACKLING THE CLIMATE EMERGENCY IMPLICATIONS

7.2.1 There are no impacts on greenhouse gas emissions.

7.3 COMMUNITY SAFETY IMPLICATIONS

7.3.1 There are no community safety implications from the allocation of grant funding from the Trust Fund.

7.4 HUMAN RIGHTS ACT

7.4.1 There are no implications for the Human Rights Act with the allocation of grant funding from the Trust Fund.

7.5 TRADE UNION

7.5.1 There are no implications for Trade Unions.

7.6 WARD IMPLICATIONS

7.6.1 There are no ward implications.

7.7 AREA COMMITTEE LOCALITY PLAN IMPLICATIONS

7.7.1 There are no Area Committee Locality Plan implications – the proposals support the statutory guidance for local authorities in “Securing Sufficient Services to Support Young People’s Well-being”.

7.8 IMPLICATIONS FOR CHILDREN AND YOUNG PEOPLE

7.8.1 The Proposals outlined will directly benefit young people, opening new opportunities to increase learning and provide experiences outside of the classroom. Specifically delivered in an outdoor education environment, the young people who participate in these will be identified from across the Bradford district, in line with the criteria of The Charles Semon Educational Foundation Trust.

7.9 ISSUES ARISING FROM PRIVACY IMPACT ASSESMENT

7.9.1 There are no implications arising from privacy impact assessment. The method employed to manage the proposals and reporting of activity of the Trust-supported activity will pay due regard to GDPR.

8. NOT FOR PUBLICATION DOCUMENTS

8.1 None

9. OPTIONS

9.1 None

10. RECOMMENDATIONS

10.1 That members acknowledge and approve the proposals outlined in Appendix A for the allocation of grant funding from The Charles Semon Educational Foundation Trust for 2023-24 and 2024-25.

10.2 That the members receive an updated report in February 2025 that reports back to the committee the outcomes from the proposal and that further outlines the intended allocation of grant funding from The Charles Semon Educational Foundation Trust for the future.

11. APPENDICES

11.1 Appendix A – The outline proposal for allocation of grant funding from The Charles Semon Educational Foundation Trust for the delivery period 2023-2025

12.1 Background Documents

None

Appendix A

Outline Proposal for Allocation of Grant Funding from The Charles Semon Educational Foundation Trust for the delivery period of 2023-2025

Proposal

The proposal outlined is one that sees a delivery collaboration between the Bradford Children and Families Trust and City of Bradford Metropolitan District Council's Childrens Services Department. This collaboration ensures that the delivery is achievable; able to be monitored; evidenced for charitable purposes; and that the distribution of the offers are far reaching to ensure the widest possible access for eligible beneficiaries whilst remaining committed and aligned to the objectives of the charity.

The outline proposals are:

2023-2024

1. Provision of 8 residential experiences for cohorts of up to 12 young people with additional needs, learning disabilities, poor mental health or other identified vulnerabilities that means they have missed educational learning opportunities outside of the classroom in an outdoor environment.

Delivery timetable for these is between December 2023 and March 2024.

Staffing is provided at the appropriate level to enable young people to fully engage with the outdoor offer – this is envisaged to be at least 3 experienced practitioners who are well-known to the visiting group and who already have a relationship with the young people who are to take part in the experience.

Staff at the outdoor education centre of Buckden House will build a bespoke programme of activity to enable all group members to take part in a shared experience for the duration of the residential experience.

Residential experiences would run from Friday evening to Sunday late afternoon and would include activity offers across all parts of the weekend – as outlined in the table below.

Friday evening	Saturday morning	Saturday afternoon	Saturday evening	Sunday morning	Sunday afternoon
Activity provided by Youth Work practitioners / Support staff	Activity provided by outdoor education specialists	Activity provided by outdoor education specialist	Activity provided by Youth Work practitioners / Support staff	Activity provided by outdoor education specialists	Activity provided by outdoor education specialists

Accommodation would be at the outdoor education centre Buckden House and would be a self-catering arrangement. The provision of self-catering boxes for young people will ensure ease of use – this will include Breakfast boxes, packed

meals and snacks throughout the residential experience. The Saturday evening meal will be provided as a hot meal suitable to meet the dietary requirements of the visiting groups.

Transport will be provided to the young people to travel as one group – in the main this would be provided in the form of a minibus with a separate vehicle for the transportation of luggage and personal items.

Equipment required to take part in the outdoor experiences will be provided by the outdoor education centre, ensuring that they have adequate specialist equipment to enable the individuals participating to share the experiences as one group, and without any segregation.

Bedding will also be provided by the outdoor education centre.

Buckden House has extensive grounds that are fully accessible and has low level play equipment on site that can be utilised by the visiting groups.

There are also localised trails and walks that can be used, including a photo trail of the local village.

Description	Cost
Cost of outdoor learning / use of Buckden House and instructional staff x 2	£4,000
Additional instructional staff member to meet bespoke needs	£300
Youth and support work staffing x 3	£1,650
Additional support staff member to meet bespoke needs (signers etc)	£300
Transport – minibus and van and fuel with driver (Specialist transport as reqd)	£750
Catering package for 18 people (young people and staffing)	£1,000
Additional resources to support engagement (balls with bells / tactile maps etc)	£600
Laundry hire / cleaning service	£310
Total cost per residential	£8,910

X 8 residentials

Total £71,280

- Alongside this we would look to provide a number of single day activities for young people for who are not yet ready to spend an overnight away from the home.

This would see smaller groups of 5-6 young people coming together to share an outdoor learning experience. We would be looking to have more localised delivery to reduce the impact the journey time would take on the activity delivery and to make this more accessible for young people who are less able to manage longer journeys.

Each day would require 3 staff members to support the young people, who we would target due to their complexity of support need, to work alongside outdoor instructional staff.

Description	Cost
Instructional staff member to meet bespoke needs	£300
Youth and support work staffing x 3	£650
Additional support staff member to meet bespoke needs (signers etc)	£150

Transport – minibus and van and fuel with Driver (Specialist transport as reqd)	£120
Catering package	£150
Additional resources to support engagement (balls with bells / tactile maps etc.)	£100
Total Cost per specialist day	£1,470

X 6 delivery days **Total £8,820**

3. We are proposing to purchase a “para trekker”, which is an off-road, all-terrain wheelchair that will ensure long-term and increased accessibility for a wider cohort of children and young people who visit the centre in the future. Cost of such equipment and lack of availability of this sort of equipment in the centre is one of the reasons some children have previously not been able to fully engage alongside their peers.

Total £4,999

Delivery of outdoor learning packages for 2023-24 would total £85,099.

2024-2025

During 2024-25 we would look to replicate the offer of outdoor learning packages, as outlined above, identifying new cohorts of young people to participate in the 2024-25 offers. We would intend to offer both single day and full residential / overnight experiences as outlined above.

We would not envisage the need for additional equipment as any items used in delivery in the 2023-24 period would be able to be reallocated to support 2024-25 delivery.

Our planned delivery for 2024-25 would total £83,000 across the programme delivery which replicates costs for 2023-24, plus a 4% increase.

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