

# *Fieldwork: the first phase*

**T**rustees were determined from the outset to emphasise the role of the Field Officers.

They did not simply want the Trust to be reactive to demands made upon it - they wanted small community organisations to benefit from the trust and for decisions on applications to be made with as full an understanding as possible of the context in which organisations were operating.

They wished the staff to be knowledgeable about the world of small groups both locally and from a pan-London viewpoint.

Moreover, they themselves wished to be fully informed about the staff's discoveries.

It was a priority for the Trustees that there should be no confusion about the quite separate roles of the Trust for London and the City Parochial Foundation. The Trust was not to be seen as the 'small grants arm' of the Foundation and there was an early acknowledgement that the new trust would require a different approach and a quite distinct *modus operandi*.

Field staff had to make this clear in promoting the new trust at the same time as encouraging applications. The fact that the staff were actually employed by the City Parochial Foundation never caused any confusion. Indeed, among charitable groups who could have been forgiven for some misunderstanding, there was rarely any mix up over the identity or role of the

## PROFILE

### THE MUSLIM WOMEN'S ASSOCIATION

The Muslim Women's Welfare Association is a registered charity and company limited by guarantee. It was established in 1980.

The organisation aims to improve the quality of life of Muslim women living in the borough of Waltham Forest and in particular carries out projects to provide for their welfare.

In 1988 the organisation received a grant of £9,360 spread over two years from the Trust for London to enable it to employ a part-time Toy Library Organiser and a Finance Worker. At that time the organisation was running mother tongue classes, classes in English for adults, sewing, cookery and music classes, organising a luncheon club for the elderly and carrying out liaison work with schools, including interpreting and counselling. In addition, the group offered advice to women and organised holiday schemes.

The Trust made grants to the Muslim Women's

Welfare Association on several occasions. Now, ten years later the organisation is still involved in a wide variety of activities. It still runs classes in English, dress-making and Urdu for children. However, it also organises health and beauty sessions, design sessions, runs toy and video libraries, and is active in work on domestic violence and drug awareness. Funding is now received from a wide variety of bodies including the National Lottery Charities Board, and the organisation is well and truly established as an important resource for Muslim women in Waltham Forest.

Mrs Meher Khan, the original Co-ordinator of the project, with a small group of management committee members, has been the driving force in this organisation. Mrs Khan, a former Mayor of Waltham Forest, still works as the Co-ordinator and remains a champion of Muslim women in the borough.

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**Carers in Barking and Dagenham**

Carers in Barking and Dagenham was formed in 1986 and is affiliated to the Carers National Association. It now has its own office and two experienced members of staff.



Trust and the Foundation.

**The early years**

The necessity for a pro-active approach had been identified in the early voluntary sector consultations. Had this recommendation not been adopted the targeting of small groups would have been a somewhat futile gesture. Small groups are not on networks and many are isolated, so a purely reactive approach may well have resulted in the trust spending little money or only spending it on a favoured few. It was decided to divide the 32 London boroughs between the two Field Officers with the Secretary to the Trust, Tim Cook, also assuming responsibility for some

boroughs (and the City of London) in order to keep in close touch with developments. Work in the boroughs was spread over a four year period with eight different boroughs targeted each year. Thus it was intended that all small groups in each London borough would have a fair chance of applying for funds.

Organisations within the priority categories (black and minority ethnic groups and womens groups in any borough) could apply at any time. They did not have to wait for 'their turn' in the borough programme. The same applied to small groups wanting grants of up to £500.

**The Borough programme**

The borough programme operated on the following basis:

1988	1989	1990	1991
Tower Hamlets	Hackney	Westminster	Lewisham
Islington	Southwark	Kensington and Chelsea	Greenwich
Camden	Lambeth	Wandsworth	Richmond
Hammersmith and Fulham	Newham	Brent	Harrow
Barking and Dagenham	Haringey	Hounslow	Havering
Ealing	Waltham Forest	Barnet	Bromley
Merton	Redbridge	Enfield	Bexley
Croydon	Kingston	Hillingdon	Sutton

A mixture of outer and inner London boroughs each year was obviously desirable and it seemed fair that those boroughs which had responded positively to the Trust's request for consultation should have an early opportunity to benefit. Other than this, the selection was somewhat arbitrary, and initially this particular distribution of the boroughs was frequently questioned.

While most who raised questions accepted the explanations, others bitterly attacked the basis upon which the boroughs had been divided. One particular council for voluntary service general secretary angrily telephoned, to query why her particular borough had not been included in the list for the first year. She had called the press to a public meeting of 'angry' voluntary sector organisations who 'wanted answers' and the field officer was 'invited' or rather, required to be there. In the event, a handful of people (and no press) attended what became a very pleasant session.

### Guidelines for applicants

In 1988 the Trust produced the first in a series of leaflets entitled '*Guidelines for applicants, priorities, policies and procedures.*' Ten years later, such leaflets are regularly produced by funders and it is hard to believe the enthusiasm with which the Trust's first guidelines were received. At that time many funders operated almost secretly and few made clear what type of groups and applications they would welcome. (A similarly warm response was received when the Trust published its first annual report thereby becoming one of a very select number of trusts which produced such a document).

The leaflet detailing the Trust's guidelines for applicants was distributed widely across London. Umbrella bodies, local authorities, community meeting places, places of worship, indeed any location which might be in touch with small groups, were sent copies.

The media, including the voluntary sector press, appropriate national publications, local radio and television were all circulated and responded. An extremely effective means of publicising

Grants by Borough 1988-1997

Borough	TOTAL	
	No of Grants	Amount £
London Wide	39	388,482
Barking and Dagenham	14	64,712
Barnet	42	165,756
Bexley	52	185,275
Brent	50	425,230
Bromley	29	127,855
Camden	50	273,680
Croydon	43	165,252
Ealing	25	130,092
Eafield	45	231,962
Greenwich	42	223,598
Hackney	73	387,922
Hammersmith and Fulham	47	199,120
Haringey	52	308,700
Harrow	25	125,085
Havering	39	105,228
Hillingdon	18	77,785
Hounslow	44	197,795
Islington	52	209,715
Kensington and Chelsea	45	307,893
Kingston	31	146,605
Lambeth	47	308,770
Lewisham	35	153,222
Merton	38	202,515
Newham	42	219,353
Redbridge	28	100,850
Richmond	17	72,000
Southwark	63	303,785
Sutton	38	230,650
City of London	-	-
Tower Hamlets	50	258,407
Waltham Forest	61	317,520
Wandsworth	34	136,690
Westminster	36	219,950
<b>TOTAL</b>	<b>1,340</b>	<b>6,871,943</b>

the Trust and its grant-making priorities, turned out to be the local free press, more than 800 such papers are published in London. In all, several thousand copies of the leaflet were distributed this way. The result? Two field officers spent three weeks on the telephone answering one call after another as news began to spread of the Trust and the groups which it was interested to fund.

### Work in the boroughs

Work in the eight boroughs targeted for 1988 began in earnest in March of that year. In general, the response in the boroughs was positive, though some

## PROFILE

### THE UMBRELLA CLUB

The Umbrella Club for elderly people began in 1980. When it received a grant of £218 from the Trust for London in 1988 it was constituted as a voluntary organisation which aimed to assist elderly people living on the High Park Estate of South Wimbledon. At that time it provided a weekly get-together and various social events. It offered its members help with particular problems such as queries over rent payments, and it also arranged regular outings and an annual holiday. It had 114 members, 90 of whom were women, almost all widows. The group received no financial support and raised all its money through its ten pence a week fee and events such as jumble sales.

The women of the Umbrella Club were keen dancers and they needed a twin tape system and three tapes. The grant of £218 allowed them to purchase this equipment.

Ten years later the Umbrella group meets regularly; the age range of its members is from 60-90 years and members do tap dancing, line dancing and singing to the music system purchased ten years ago. The organisation receives no funds from any source.

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organisations denied the existence of small groups as defined by the Trust (those with no more than the equivalent of two full-time members of staff) and particularly the priority groups (black and minority ethnic groups and womens groups). Some other large charitable organisations felt that the Trust's priority groups had been wrongly decided and that small was synonymous with irresponsible.

Word of mouth proved to be a particularly effective way of reaching small groups, and field staff sought a slot on every public meeting agenda to speak about the Trust and encourage approaches from small groups. Visits were made to local umbrella bodies and any individual or organisation likely to be knowledgeable about the kind of groups we wished to reach. By talking to a wide range of bodies a profile of each borough was established and kept up to date thereafter.

For the most part the co-operation received was outstanding. Local authorities and the voluntary sector forums were extremely helpful, as were councils for voluntary service, councils for racial

equality (as race equality councils were then known), inter-faith groups and many others. Without the assistance of such bodies the Trust's efforts would have been much less productive.

At an early stage in this process it was discovered that it was not possible to use the same approach in all the boroughs. For example, in Tower Hamlets, divided as it was into neighbourhoods, the situation was especially complicated as the neighbourhoods often seemed to require different approaches.

Running surgeries was, and still is, very effective in some places. An appropriate umbrella body gathers together in its office up to 12 small groups who are interested in talking to a field officer. Each group has an initial interview with the field officer which may result in a follow up visit to the group's base. Alternatively, the group may be told that it is not eligible for funding.

Through these sessions information and advice can easily be provided, and if a group needs help urgently it can be given immediately, or arranged via the host umbrella body. Most importantly, groups know they are being taken seriously.

Surgeries were not always successful. One field officer spent two days in the offices of one umbrella body waiting for 16 scheduled groups to turn up. None did despite firm reassurance from the umbrella organisation that they were all due!

Spending lengthy periods of time in the boroughs at different times of day and at weekends meant that field officers were able to build up a substantial bank of knowledge about the situation in the different London boroughs. It is striking how different the same place can seem at 10 am and 10 pm and how remote some places seem even in the heart of London.

Local authorities, health authorities and others were generous with information but the 'soft' information acquired by sitting through lengthy community meetings whilst awaiting the Trusts' 'advertisement slot' was equally useful. (A field officer's knowledge of 16 boroughs



### **Acton Homeless Concern**

Acton Homeless Concern was established in 1988 and currently employs two full-time and one part-time workers. It sees 120 people per day and provides hot meals, runs an advocacy service and provides welfare rights advice.

An optician, chiropodist, health visitor, nurse, dentist, GP and barber all undertake regular sessions.

became very detailed whilst her knowledge of the other 16 might well be zero). Visits to small groups also add to the intelligence about a borough, not only facts and figures about the voluntary sector, but where communities and other organisations and services are located, (if they exist at all). What are the needs or problems in different localities? How good is transport? (In certain boroughs it is easier and quicker to travel back into central London, change Underground lines, and travel back to the same borough, than go across it by public transport). This 'soft' information is very helpful to the staff as background to their grant recommendations.

### **The process of application**

Trust staff thought long and hard about the appropriateness of an application form and eventually decided that this could be helpful. However, it was agreed, and the policy has endured ever since, that

application forms would not simply be handed out in response to requests.

The process of making an application involves early contact between the applicant group and the appropriate field officer. There is then considerable discussion about the group, its structure, management, work and finances (if any), as well as the nature of the potential application. Only when the field officer is satisfied on all of these issues will an application form be handed over, by which time it should not present the group with any surprises. The field officer goes through the form to ensure understanding and, if necessary, will assist with completion.

This approach means that groups making an application can receive a considerable amount of help from the field officer. However, it is equally effective in deterring those not yet ready

to make an application. Only when the field officer judges the application to be complete does it go before the Grants Committee. These methods mean that few applications are rejected. Indeed by the end of 1988 while grants had been made to 184 organisations, only 19 applications had been turned down.

### Advisory committees

As the work of the Trust progressed, issues arose about which the field officers did not feel confident and it was decided to seek advice. During the initial consultations with the voluntary sector it had been recommended that an advisory group on black and minority ethnic issues be set up.

This body came into being during 1988 with five members: Bharat Mehta, David

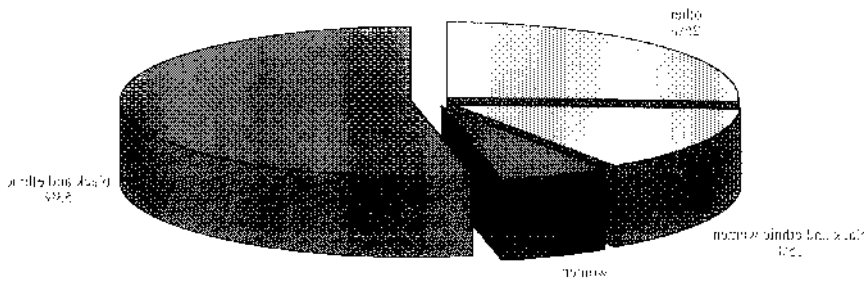
addition to financial help became evident. Field officers came across groups engaged in important work in neglected areas where the need for funds was indisputable. What was in doubt was their capacity to manage any funds made available. Thus the opportunity was taken to ensure that grants provided a positive experience rather than a potential or indeed actual nightmare.

To avoid such problems, during 1988 the Trust made available funds to several organisations to pay for consultancy help to enable them to put in place management and operational systems and structures to ensure they achieved full benefit from the grant. Clearly this was only done where there were no relevant support agencies to help. However, the Trust soon found that for a wide variety of reasons appropriate support was frequently not available, though it has to be said that the help by an organisation for small black and minority ethnic groups now known as SIA, was particularly valuable at this stage.

Over the following years the Trust increasingly used the services of consultants. However, Groups needed assistance with long-term development whereas, consultants could best assist an organisation to overcome a particular problem but not necessarily move much further forward.

By the end of the first four years of the Trust's operations, the need that small groups had for this technical support on issues such as accountancy and employment law was undeniable. The seeds had been sown for the establishment of the small groups worker scheme (see page 28). A report on the Small Groups Worker Scheme, *Voluntary groups: helping them develop*, is available from the Trust for London.

### Distribution of grant



Bryan, Albert Tucker, Efua Dorkenoo and Simin Azimi, (later replaced by Tzeggai Yohannes). The group did not consider individual applications but was concerned with general issues affecting the wide range of minority ethnic communities across London.

Advice was received from the group in relation to arts organisations, mother tongue classes, supplementary education, elderly people, and the striking absence of applications from bodies concerned with any form of disability. The contribution of this group was immensely valuable and sessions with them were highly enjoyable. They remain in the memory of field staff as being exciting, enlightening and encouraging.

### The need for technical support and practical assistance

Very early in the Trust's operations the need for support for small groups in