



## The City Bridge Trust Committee

**Date:** MONDAY, 6 FEBRUARY 2017  
**Time:** 1.45 pm  
**Venue:** COMMITTEE ROOMS, 2ND FLOOR, WEST WING, GUILDHALL

**Members:** Alderman Alison Gowman (Chairman)  
Ian Seaton (Deputy Chairman)  
Karina Dostalova  
Simon Duckworth  
Stuart Fraser  
Marianne Fredericks  
Deputy Stanley Ginsburg  
Deputy the Revd Stephen Haines  
Alderman Vincent Keaveny  
Vivienne Littlechild  
Edward Lord  
Jeremy Mayhew  
Wendy Mead  
Dhruv Patel  
Alderman Andrew Parmley (Ex-Officio Member)

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**Lunch will be served in Guildhall Club at 1PM**  
**NB: Part of this meeting could be the subject of audio or video recording**

**John Barradell**  
Town Clerk and Chief Executive

# **AGENDA**

## **Part 1 - Public Agenda**

1. **APOLOGIES**
2. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**
3. **MINUTES**  
To agree the minutes and non-public summary of the meeting held on 10 January 2017.  
**For Decision**  
(Pages 1 - 6)
4. **OUTSTANDING ACTIONS**  
Report of the Town Clerk.  
**For Information**  
(Pages 7 - 8)
5. **PROGRESS REPORT**  
Report of the Chief Grants Officer.  
**For Decision**  
(Pages 9 - 14)
6. **CITY BRIDGE TRUST DRAFT STRATEGIC REVIEW, 2018-2023**  
Report of the Chief Grants Officer.  
**For Discussion**  
(Pages 15 - 114)
7. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**
8. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT**
9. **EXCLUSION OF THE PUBLIC**  
MOTION – That under Section 100A(4) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part I of Schedule 12A of the Local Government Act.

## **Part 2 - Non-Public Agenda**

10. **NON-PUBLIC MINUTES**  
To agree the non-public minutes of the meeting held on 10<sup>th</sup> January 2017.  
**For Decision**  
(Pages 115 - 116)
11. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**
12. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

## THE CITY BRIDGE TRUST COMMITTEE

**Tuesday, 10 January 2017**

Minutes of the meeting of The City Bridge Trust Committee held at Guildhall, EC2 on Tuesday, 10 January 2017 at 2.30 pm

### **Present**

#### **Members:**

Alderman Alison Gowman (Chairman)  
Ian Seaton (Deputy Chairman)  
Karina Dostalova  
Marianne Fredericks  
Deputy Stanley Ginsburg  
Alderman Vincent Keaveny  
Edward Lord  
Wendy Mead

#### **Officers:**

Philippa Sewell	-	Town Clerk's Department
Karen Atkinson	-	Head of Charity & Social Investment Finance
David Farnsworth	-	Chief Grants Officer
Sufina Ahmad	-	Head of Strategic Review
Sandra Davidson	-	The City Bridge Trust
Olivia Dix	-	The City Bridge Trust
Martin Hall	-	The City Bridge Trust
Joan Millbank	-	The City Bridge Trust
Ciaran Rafferty	-	The City Bridge Trust
Shegufta Rahman	-	The City Bridge Trust
Tim Wilson	-	The City Bridge Trust
Kristina Drake	-	Communications Team

#### **In Attendance:**

- Donnachadh McCarthy from 3 Acorns Eco-audits
- Jaq Cameron from Kensington and Chelsea Foundation
- Irene Lafferty from SSAFA the Armed Forces charity

#### **1. 3 ACORNS ECO-AUDITS**

The Committee welcomed Donnachadh McCarthy from 3 Acorns Eco-audits to the meeting.

Mr McCarthy advised that eco-audits assessed current environmental performance, noting good practices already in place and devising a detailed plan for improvements and reducing costs in the process. Members noted that eco-audits took the form of a site visit and walkabout, along with meetings with staff, managers and lobbyists to ensure a holistic approach. A follow-up meeting was carried out after a year to ascertain what had been successful and

what hadn't, and to secure feedback for the eco-audit process. 3 Acorns Eco-audits also offered workshops for charities working with vulnerable people to enable workers to offer eco-tips to the users of the charity, thereby supporting them to reduce their personal outgoings in addition to the other assistance given.

In response to Members' questions, officers advised that the Trust funded the costs of eco-audits for all London-based third sector organisations (not just CBT grantees) and Mr McCarthy detailed some examples of the positive outcomes of eco audits and confirmed that 3 Acorns Eco - audits had carried out an eco-audit of the CBT team and its office area and the results would be acted upon by the CBT team.

The Chairman thanked Donnachadh McCarthy for his presentation.

2. **APOLOGIES**

Apologies were received from the Right Hon. the Lord Mayor Dr Andrew Parmley, Simon Duckworth, Deputy the Revd. Stephen Haines and Vivienne Littlechild.

3. **MEMBERS' DECLARATIONS UNDER THE CODE OF CONDUCT IN RESPECT OF ITEMS ON THE AGENDA**

The Chairman, Alderman Alison Gowman, declared a non-pecuniary interest in the Greenwich Foundation for the Old Royal Naval College, West London Mission (a withdrawn application) and the Kensington and Chelsea Foundation.

The Deputy Chairman, Ian Seaton, declared a non-pecuniary interest in SSAFA, Upper Room and London Youth.

4. **MINUTES**

**RESOLVED** – That the public minutes of the meeting held on 24 November 2016 be agreed as an accurate record.

**Matters Arising**

Proposed Revenue Budgets

Officers advised that the 2017/18 budget had been approved by the Resource Allocation Sub Committee.

ClientEarth

Officers advised that due diligence had been completed and the grant had been approved. A letter had also been sent making reference to salary levels, which seemed unduly high. In response to a Member's question, officers confirmed ClientEarth were working with the pollution team at Walbrook Wharf.

5. **OUTSTANDING ACTIONS**

**March 2017 meeting**

Members discussed the timing of the meeting and its proximity to the elections, and agreed to reschedule for earlier that morning.

**RESOLVED** – That the Outstanding Actions update be noted, and the March meeting be rescheduled for 9.15am on Monday 20<sup>th</sup>.

**6. TERMS OF REFERENCE AND FREQUENCY OF MEETINGS**

Members received a report of the Town Clerk.

**RESOLVED** – That the Committee approves the Terms of Reference of the City Bridge Trust Committee for submission to the Court of Common Council, and agrees that meetings should remain scheduled at the same frequency.

**7. PROGRESS REPORT**

The Committee received the regular progress report of the Chief Grants Officer and discussed the updates provided.

CBT Strategic Review

The Chief Grants Officer encouraged Members to contact the Head of Strategic Review for further information or to feed-in at any stage of the process, and advised that research and analysis from the review so far was anticipated to be brought to and made the main focus of the February meeting.

Communications

The Chief Grants Officer advised that the communications table had been streamlined by audience and would be combined with the events table (currently later in the agenda) in the future. He thanked the Media Officer for the Trust, Kristina Drake, who continued to secure media activity and publications and who was issuing a weekly email to Members regarding media coverage.

Association of Charitable Foundations (ACF) Annual Conference

The Chief Grants Officer advised that there was a mistake in the papers – the ACF conference was scheduled for Wednesday 8<sup>th</sup> November 2017 and the National Council of Voluntary Organisations conference was scheduled for Thursday 20<sup>th</sup> April 2017.

**RESOLVED** – That the report be noted.

**8. GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS**

**8a London Youth Quality Mark Awards**

**APPROVED** - £150,000 to continue the London Youth Quality Mark Awards scheme until the implementation of the City Bridge Trust's new programmes in 2018.

**8b BiPolar UK**

Members discussed the application and agreed that, despite the project's reach outside of London (and therefore outside the Trust's Charitable Objects), the charity was unique and particularly worthwhile and the grant recommendation reflected the fact that 25% of the BiPolar UK eCommunity were Londoners (not 15% as reported by mistake in the agenda). In addition, officers confirmed that

they would ask the organisation to implement appropriate systems to ensure that the London benefit could be determined.

**APPROVED** - £200,000 over three years (£65,300; £60,500; £74,200) towards 25% of the full-time Information & Support Manager's salary; part-time Moderators; eCommunity platform development; IT support and on costs.

**8c Mind in Camden**

**APPROVED** - £132,350 over three years (£42,850; £44,100; £45,400) towards a full-time salary, running costs and overheads to develop networks of peer support for people who hear voices at places of detainment in London.

**8d Greenwich Foundation for the Old Royal Naval College**

**APPROVED** - £100,000 towards costs of the access work to the entrance area to the Painted Hall.

**8e The Soldiers, Sailors, Airmen and Families Association -Forces Help (SSAFA)**

**APPROVED** - £102,000 over 3 years (£33,300; £34,000; £34,700) for the salary of the full-time Stepping Stones House Home Manager. The grant in years 2 and 3 is conditional on sufficient funds being raised to make the initiative viable.

**8f Cripplegate Foundation**

**APPROVED** - £141,000 over three years (£45,640, £47,000, £48,360) towards staffing and operational costs of the Saturday Socials programme.

**8g Royal Trinity Hospice**

**APPROVED** - £107,100 over three years (£35,400; £35,300; £36,400) towards the salary of a full-time Dementia Specialist Nurse and associated project costs.

**8h Refugee Action**

**APPROVED** - £165,000 over three years (£54,900; £54,700; £55,400) towards the costs of 4 days per week Project Co-ordinator; 1 day per week Deputy Manager; volunteer costs for 10 volunteers; and associated running costs.

**8i Upper Room (St Saviour's with St Mary's)**

**APPROVED** - £107,114 over three years (£35,000, £35,700, £36,414) for 2 days per week of the Project Co-ordinator salary plus project costs of the UR4Driving Project.

**8j Eastside Primetimers Foundation**

Members noted this item had been deferred.

**8k Sound Connections**

**APPROVED** - £60,000 over three years (£14,000; £22,000; £24,000) towards staff costs - project management and coordination, freelance costs, associated running costs and training sessions to develop and expand the Challenging Music Network in London.

8l **The Kensington and Chelsea Foundation (KCF)**

**APPROVED** - £100,000 over two years (2 x £50,000) to continue to pay the salary of the head of Business and Community Together and some associated costs.

9. **TO CONSIDER REPORTS OF THE CHIEF GRANTS OFFICER AS FOLLOWS:-**

9a **Applications recommended for rejection**

The Committee considered a report of the Chief Grants Officer, which recommended that thirteen grant applications be rejected for the reasons identified in the schedule attached to the report.

**RESOLVED** – That thirteen grant applications detailed in the schedule attached to the report be rejected.

9b **Grants/expenditure considered under Delegated Authority**

The Committee received a report of the Chief Grants Officer which advised Members of six expenditure items, totalling £181,520, which had been presented for approval under delegated authority to the Chief Grants Officer in consultation with the Chairman and Deputy Chairman.

**RESOLVED** – That the report be noted.

9c **Withdrawn & Lapsed applications**

The Committee received a report of the Chief Grants Officer which provided details of eight applications which had been withdrawn or had lapsed.

**RESOLVED** – That the report be noted.

9d **Report on monitoring visits**

The Committee received a report of the Chief Grants Officer about two visits that had taken place.

**RESOLVED** – That the report be received.

9e **Events Attended**

The Committee noted a report of the Chief Grants Officer regarding the key meetings and events attended by Members and officers since the last meeting. The Chief Grants Officer advised there were some duplications in the table.

**RESOLVED** – That the report be noted.

10. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

11. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT**

There was no other business.

12. **EXCLUSION OF THE PUBLIC**

**RESOLVED** – That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting for the following items of business on the grounds that they involve the likely disclosure of exempt information as defined in Part 1 of Schedule 12A of the Local Government Act.

<b>Item No.</b>	<b>Exempt Paragraphs</b>
13, 15	3
14	-

13. **PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS**

The Committee received a report of the Chief Grants Officer outlining the pipeline for strategic grants.

14. **QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE**

There were no questions.

15. **ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS URGENT AND WHICH THE COMMITTEE AGREE SHOULD BE CONSIDERED WHILST THE PUBLIC ARE EXCLUDED**

There was one item of other business.

**The meeting ended at 3.18 pm**

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Chairman

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## The City Bridge Trust Committee – Outstanding Actions

Item	Date	Action	Officer responsible	To be completed/ progressed to next stage	Progress Update
1.	22 Sep 2016	<b>Website</b> Phase 2 (making the website more interactive) will be implemented in autumn 2017.	CBT team	<b>September 2017</b>	On track.
2.	24 Nov 2016	<b>Strategic Initiative Grants in management</b> Future updates to be staggered throughout the year.	CBT team	<b>From February 2017</b>	On track.
3.	10 Jan 2017	<b>2017 Dates</b> The additional meeting in March 2017 be rescheduled.	Town Clerk	<b>January 2017</b>	Meeting rescheduled for 9.15am on Monday 20 <sup>th</sup> March 2017.
4.	10 Jan 2017	<b>Stepping Stones</b> Proposal for an invitation-only strand for Stepping Stones.	CBT Team	<b>February 2017</b>	On agenda for February meeting.
5.	10 Jan 2017	<b>Support Into Employment for Disabled People</b> Specific recommendations for funding be presented.	CBT Team	<b>March 2017</b>	On agenda for March meeting.
6.	10 Jan 2017	<b>Strategic Review</b> Initial conclusions from research and analysis be presented.	CBT Team	<b>February 2017</b>	On agenda for February meeting.

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<b>Committee:</b> The City Bridge Trust (CBT) Committee	<b>Dated:</b> 6 <sup>th</sup> February 2017
<b>Subject:</b> Progress Report	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

## Summary

The principal focus of the February CBT Committee meeting is the 5 Year Strategic Review rather than the usual grant-making and analysis (see separate paper below). This report includes:

- An update on the City Bridge Trust website;
- A draft CBT high-level departmental business plan; and
- Detail of a new pilot element of the next Stepping Stones grants round.

## Recommendations

- a) To review and provide feedback on the draft high-level CBT business plan – both its format and content.
- b) To agree the new pilot element of the next Stepping Stones grants round and that £5,000 of the agreed £500,000 be used to fund a social investment intermediary organisation to work with CBT and the selected grantees on delivering the pilot.

## Main Report

### Introduction

#### Draft high-level CBT plan

1. As some Members will be aware, a new framework for corporate and business planning is currently being developed, led by Kate Smith, the Corporation's new Head of Corporate Strategy and Performance. The aims of this new approach include:
  - To align departmental business plans with outcomes in the strategic corporate plan;
  - To lay a "golden thread" such that everything we do and develop is well thought through, aligned with the corporate plan, and included within a departmental business plan, team plan, or individual work plan;
  - To have corporate strategy driving business planning and resource allocation, and;
  - To support a culture of continuous improvement, challenging ourselves about the effectiveness of our services and the value they provide.

2. As this new approach involves in-parallel changes to a number of high-level processes, it will take 2-3 years to be fully implemented. Because of this, 2017/18 is very much a year of transition. Work has started on preparing the revised corporate plan, based on outcomes identified by the People, Place and Prosperity Strategic Chief Officer Groups, leading to full Member approval of the plan before the start of the 2018/19 financial year. Revised departmental business planning documentation is being introduced to address Member concerns over the consistency of presentation across the organisation, and a desire to see a succinct statement of key ambitions and objectives for every department.
3. Whilst the CBT business plan is drafted to deliver the CBT strategy which is driven by the best interests of the charity, it makes sense that CBT adopts the same format as Corporation departments. In the initial phase, Departments and CBT have been asked to produce a draft high-level departmental plan, to a standard template, for discussion with their Service Committees, prior to the Common Council elections, where Committee meeting dates permit.
4. The template for these high-level plans has been developed through consultation so far with Chief Officers, their business planners, and Service Committee Chairmen. As well as key information on ambitions, budget and planned outcomes, the template includes scope for departments to report key projects, development needs, and known future events that will influence service delivery. It should be noted that the format for these plans has not been finally determined, therefore Members are invited to comment on the format of the high-level plan, as well as the content. The draft high-level City Bridge Trust plan is attached at Appendix 1 for your consideration.
5. Following the elections in March, Chief Officers have been asked to present the final draft of their high-level plans to their Service Committees for approval, supported by more detailed plans for 2017/18, in the previously used format. The departmental ambitions agreed at this time will then be used to inform budget setting for 2018/19, and for the development of the 2018-23 Corporate Plan. During 2017/18, consultation will also take place on the format of the more detailed departmental plans, with a view to a standard format being introduced for 2018/19 onwards.

### **Stepping Stones Fund**

6. At your November meeting you approved £500,000 towards the fourth round of Stepping Stones and, within this programme, the end of the scheme's Risk Finance strand since it had attracted so few applications. It was noted that the Trust wished to trial a new invitation-only strand, providing bespoke assistance to CBT grantees who might be willing to consider social investment if they received suitable guidance. The organisations selected would be those who have not previously applied to Stepping Stones, but who Grants Officers think have potential to look to the social investment market in due course if they did further work on their enterprise activities.

7. The Trust proposes to commission a social investment intermediary organisation, most likely one which has had experience of supporting Stepping Stones grantees, for purposes of pilot testing the invitation-only strand. The intermediary would develop a checklist of criteria that help grants officers identify when organisations may be ready for social investment support, and then help CBT select up to ten suitable groups from the current caseload. These groups would be invited to a workshop where they would learn more about the social investment market and the ways in which other charities have used repayable finance to deliver mission.
8. Five organisations would then be selected for one-to-one support, spending half a day with the social investment intermediary to look at current and potential revenue streams as well as skills and capacities needed for loan finance. The intermediary would prepare short reports for each not only to provide them with new ideas for mission delivery but also to help planning for subsequent Stepping Stones applications. The reports would also give the Trust guidance on how to market the support to a wider range of groups. UBS, your partner for the Stepping Stones Fund, has trialled similar work in the past with positive effect.
9. Your approval is sought to pilot this invitation-only trial. It will be funded at a level of £5,000 in the fourth round. As with previous rounds this will allow the majority of funds to be used towards Stepping Stones work under the Capacity Building and Piloting Outcomes strands.

### **City Bridge Trust Website**

10. Following the re-launch of the Trust's website in July 2016, your officers have undertaken a six-month review of the new website in order to respond to feedback received from users including grantees, Members, and officers. This feedback was largely very positive, but it was recognised that the Recent Grant search tool could be improved to make it more user-friendly and intuitive. Work to update this has now begun and will be rolled out in the next few weeks. The website will continue to be updated and improved as necessary and any further Member suggestions are welcomed.
11. In December we began a review of the Trust's Parklife London ([www.parklifelondon.org](http://www.parklifelondon.org)) website which provides a searchable map of London's green spaces. The first stage of this was an audit of the existing site, which has now been completed. Your officers will be considering the results of this over the next few weeks and a further update will be presented at your March committee meeting.

### **Appendix 1: Draft high-level City Bridge Trust plan**

#### **David Farnsworth**

Director of CBT and Chief Grants Officer

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# 2017/2018

**Our vision is to create a fairer London.**

## Our ambitions are:

- To tackle disadvantage in London and make it a fairer place to live and work.
- To develop London further as a global hub for charitable giving and social investment.
- To be a strategic, collaborative and influential funder.

## What we do is:

- Grant-making: We award grants totalling £21M per year to charitable organisations across Greater London.
- Giving: We encourage individuals and businesses to give more time, money and skills/benefits in kind in a way that makes a positive difference.
- Social Investment: We manage the City of London Corporation's Social Investment Fund which aims to achieve a positive financial return and demonstrable social benefit.
- Strategic initiatives: These include research, feasibility studies and conferences, often undertaken in partnership with other bodies.
- Contract management: We manage the City of London Corporation's Central Grants Unit and the Wembley National Stadium Trust.

## Our budget is:

Grants budget	£21,000,000
Total CBT Local risk (Employees/Supplies and Services)	£1,471,000
Wembley National Stadium Trust (admin. Fee)	£108,000
Central Grants Unit (admin. Fee)	£41,000
<b>TOTAL</b>	<b>£22,620,000</b>

## Our top line objectives are:

### To increase the quality and impact of our charitable funding by:

- Agreeing the 2018-2023 strategy resulting from the five year Strategic Review.
- Developing an Evaluation and Learning Plan to underpin the delivery of the strategy.
- Putting in place the resources to implement the strategy.
- Spending the grants budget in full.
- Making the most of our non-financial assets, from our Trustee the Corporation, its networks and related charities to deliver the strategy.

### To grow the social investment market by:

- Implementing a fourth round of the Stepping Stones Fund.
- Committing a further £3million of the Social Investment Fund.

## What we'll measure:

- Successful launch and implementation of the Strategic Review for 2018-2023.
- How staff use knowledge gained through the Learning and Evaluation Strategy and how this is disseminated to other stakeholders.
- Levels of grant spend against each of CBT's funding priorities.
- Evidence of use of the Corporation's non-financial resources to deliver the Strategy.

## What we'll measure:

- Successful launch of the fourth round of the Stepping Stones Fund (to include the quality and quantity of applications relative to previous rounds).

## 2017/2018

- Modelling effective collaboration between sectors.

### To ensure the Trust is led by strategic decisions and is customer focused by:

- Reviewing all grant processes and Business Plan in the light of the Strategic Review.
- Developing KPIs for grants assessment and management.
- Continuing to invest in grantee feedback and implement recommendations of recent survey.
- Ensuring officers keep up-to-date with the funding context.

### To encourage more giving of time, money and skills in an effective way to support thriving communities by:

- Developing a joint Giving Strategy that covers the Trust, the City of London Corporation and Mansion House and links with the work of other key stakeholders.

- The financial return and social impact of the Fund's investments.
- Number of internal/external networks engaged.

### What we'll measure:

- Evidence of increased efficiency in grant procedures and management and turnaround times measured against KPIs.
- Level of positive/negative feedback from grantees relative to sector benchmark and previous survey performance.
- Interaction with the website and social media platforms.

### What we'll measure:

- Giving Strategy agreed and implemented.
- Level of giving of time, money and benefits in kind across our trustee, the Corporation.

### How we plan to develop our capabilities this year:

- Review the Trust's staffing resource and structure to ensure it is fit for purpose.
- Maximise the input and engagement with Members of the City Bridge Trust Committee and enable any relevant training.
- Establish regular training sessions for Grants Officers for their Continuing Professional Development.
- Review the Trust's due diligence and financial procedures and implement recommended improvements.

### What we're planning to do over the following two years:

- Implement the 2018-2023 CBT Funding Strategy.
- Implement a joint Giving Strategy with the Corporation, Mansion House and key partners.
- Move towards full investment and a balanced portfolio approach to our Social Investment Fund.



<b>Committee</b>	<b>Date</b>
The City Bridge Trust Committee	6 <sup>th</sup> February 2017
<b>Subject</b> City Bridge Trust Draft Strategic Review, 2018-2023	Public
<b>Report of</b> The Chief Grants Officer	For information and discussion
<b>Report Author</b> Sufina Ahmad	

## Summary

This paper provides:

- The background to City Bridge Trust (CBT) strategic review;
- An update on progress made on the current review, including details gathered through research; analysis of CBT and its current grant-making; and consultation;
- A ‘straw person’ first draft strategy which will form the basis of a presentation and discussion in the Committee meeting; and
- Detail on proposed next steps prior to the May 2017 CBT Committee meeting when you will consider agreeing a final strategy to recommend to Court in July 2017.

## Recommendations

It is recommended that you:

- a) Note the background and progress update, review and discuss the information and raise any questions;
- b) Receive a short presentation from the Head of Strategic Review and discuss the ‘straw-person’ strategy, providing feedback to shape the next iteration;
- c) Review the proposed next steps and consider if they need amendment or addition – in particular how you would like to engage with/be updated on the refining of the strategy in the coming weeks

## Background

1. The City of London Corporation (CoLC) is the Trustee of the charity Bridge House Estates (Charity No. 1035628). In 1995, the decision was taken to create CBT. The surplus income available was to be applied for charitable activities, in accordance with a governing Scheme brought into effect on the 20 April 1995 (by Statutory Instrument 1995/1047).
2. The Scheme requires the Trustee, where there is applicable income (i.e. income surplus to the requirements to maintain and support the 5 Bridges which is the primary object of the charity), to settle a policy for the application of that income and to consult such persons as the Commission may direct. The Commission, by Order dated 10 July 1997, has directed the Trustee *inter alia*:

*“consult with such persons, bodies corporate, local authorities, government departments and agencies, voluntary organisations and other bodies as the Trustee might think appropriate from time to time, having regard to the purposes, functions and interest of the consultees, and to inform the Commission in writing of the consultation process it progressed from time to time”.*

3. Since 1995, in accordance with this scheme, reviews involving considerable consultation have been conducted every five years. At your May 2016 Committee meeting, you agreed the resources to support your current review. In August 2016, a Head of Strategic Review, Sufina Ahmad, came into post on secondment for 12 months from the Big Lottery Fund’s London team. In August 2016, the review commenced, with an official public launch by your Chairman in October 2016. The Charity Commission has been informed that the current review is underway.
4. The review includes commissioned research, analysis of your current grant-making and a consultation exercise with a range of stakeholders in line with the above Order and in pursuit of fulfilling the broad charitable purposes expressed in the Scheme. This consultation is fundamental in developing CBT’s funding strategy for 2018-2023, to be implemented so that the available funds can be applied most effectively to address the changing needs of Londoners.
5. The intention is for the strategy to be formally agreed by the Court of Common Council in July 2017.

## **Progress Update**

6. Below is an update on progress made on the current review, including detail of the key inputs: research; analysis of CBT and its current grant-making; and the on-going consultation:

## **Research**

7. To support the development of this review, the following research has been commissioned:
  - a) A London Needs Analysis – Literature Review, *Olivia Dix*.  
This was published in October 2016, and circulated to the Committee, as well as forming the basis of a presentation and discussion at your Strategic Review Half Day meeting in October 2016 – the write-up from that session is included at Appendix 1 and the Literature Review is included at Appendix 2.
  - b) Grantee Perception Survey, *Center (sic) for Effective Philanthropy*.  
In December 2016, the survey findings were finalised and in your January 2017 CBT Committee, a top-line summary was reported to you. That summary and a full copy of the survey are included at Appendix 3.

- c) Funding Best Practice, *Rob Bell*.  
In October 2016, initial findings from this work were shared with you at your strategic away half-day. The write up from that session is included at Appendix 1 and the final report will be completed by mid-February 2017.
- d) Mapping the London Funding Ecology, *Collaborate CIC*.  
The concept of a funding ecology relates to research commissioned by the Big Lottery Fund and the Calouste Gulbenkian Foundation (UK Branch), which was delivered by Collaborate CIC. The research explored the theory that funders should consider themselves as operating within an ecosystem, and then provided suggestions of how this could be successfully applied. For this strategy, CBT has discussed the concept of mapping the London funding ecology, in order to benefit both funders and the organisations that seek to work with them. To begin the process of defining the London funding ecology, CBT has initially requested that Collaborate CIC completes a market scoping exercise of CBT, and reports back on its findings. This exercise will be completed by mid-February 2017.
- e) Social Investment Scoping Report, *Eva Varga*.  
This is an options paper exploring the potential role of social investment in CBT's work in the future. This report will be finalised by mid-February 2017.

## **Analysis of CBT and its Current Grant-Making**

- 8. The Grantee Perception survey, referred to above, and the consultation (see below) both draw heavily on organisations' experience of CBT and its existing Investing in Londoners grants programmes. Your Head of Strategic Review led group S.W.O.T. (Strengths Weaknesses Opportunities Threats) analysis sessions and one to one sessions with CBT staff to gather their feedback on its Investing in Londoners programmes. Summaries are provided of the staff feedback below:

## **Staff S.W.O.T of Investing in Londoners strategy**

### Strengths

- Diversity is explored through the portfolio
- Giving of time, talent and money is pursued with ambition
- Will fund a variety of different approaches within some funding streams
- Some long-term commitments are being made to social causes
- Supporting great organisations with expertise
- Some of CBT's funding improves the sustainability of organisations
- Some opportunities in the current portfolio to distribute unrestricted funding
- Some opportunities in the current portfolio to work with new organisations
- Some opportunities to do deep-dive/thematic work, as well as place-based work
- CBT has track-record, expertise and links to networks in certain areas, e.g. inclusion
- CBT funds a diverse range of organisations

- The evidence base behind why CBT supports certain groups, e.g. Older Londoners, is irrefutable
- CBT recognises that cost per beneficiary varies depending on the intervention, and is willing to pay more where needed
- Some parts of the strategy show real clarity as to the kinds of things CBT will fund in pursuit of the aims identified
- In times of austerity and state retrenchment, approaches like social investment and encouraging giving offer strong platforms through which organisations can generate income
- Using all of CBT's assets, such as social investment, is positive for civil society and builds the robustness of the sector

### Weaknesses

- Clearer outcome metrics are needed to determine the benefits of these investments
- The value added by some of the funding approaches pursued could be researched and understood further
- CBT does not make full/effective use of all of its non-monetary assets currently
- The team is at risk of operating in silos in terms of its approaches (social investment, philanthropy, grant-making and influencing public policy)
- Demand for funding across the strategy is very variable
- Success rates for funding across the strategy can be very variable
- Sometimes there are multiple target audiences per priority, and there will be fewer applications from certain audiences, despite knowing the need exists
- Outcomes could be interpreted as outputs in some cases
- Some outcomes are perhaps too specific, and result in CBT potentially preventing groups with other well-evidenced ideas applying
- Some outcomes are too broad
- Some outcomes are difficult to measure/assess the impact made
- Some funding streams lack a clear vision or purpose
- Some lack of clarity on how some of CBT's priorities link to the strategies of others working in the same/similar policy areas
- CBT potentially needs to consider systems-based approaches for some of its work, placing the person and not the issue or the organisation applying at the heart of the process
- Some terminology used in the programmes needs updating
- Some of the strategy focuses on the manifestation of an issue, rather than dealing with the root causes
- Sometimes specialist knowledge is required to make assessments, and more could be done to cultivate this knowledge
- Some parts of the funding programmes only fund a few projects, meaning that it is hard to develop expertise in that area or derive massive amounts of learning
- Sometimes CBT lacks oversight of its overall funding portfolio, making it harder to consider the best ways in which to fulfil the ambitions set out in its strategy

## Opportunities

- To consider multiple approaches to grant making, including longer term investments, core funding etc.
- To consider more joined up approaches within the team, i.e. using grant making, social investment and encouraging more giving to tackle identified social problems in partnership with a range of different players
- To consider a funder plus offer that links to the vision being pursued by CBT
- To do more to support groups CBT funds – a more relational approach to funding
- Some funding streams link to one another, which suggests that there could be an opportunity to adopt a less programmatic approach when supporting Londoners
- To use the assets CBT possess as a funder more effectively, e.g. its links to the private and public sector through the CoLC
- To work in ways that are more proportionate and representative, thus making our work more accessible to a greater range of civil society organisations
- To be a more strategic funder in some areas where it has track-record and expertise
- To fund early action (root cause focus), and short and long term interventions
- To work more collaboratively to fund gaps and emerging/identified needs
- To consider the role of tech in the future of our funding, as well as the potential to learn from the ‘tech for good’ and tech industry ways of working
- To consider asking other funders/partners with the required expertise to distribute funding on our behalf
- Via CBT’s work and networks (including national funders) to can show London benefits all, and not just itself, whilst also gathering learning from a diverse range of non-Londoners
- Opportunities for CBT to be more strategic in its thinking on various issues, making use of all of its assets

## Threats

- Some of the things CBT aims to fund are not well-understood, and more awareness raising is needed too
- Sometimes need to consider how CBT can link the strategy/portfolio together
- The level of statutory cuts is unprecedented in some areas, and changing at a fast pace – both geographically and in terms of a thematic need, meaning demand for funding could change
- The unprecedented statutory cuts could also mean that the added value of CBT funding is at risk of becoming diminished
- The impact of some of the social issues CBT seeks to support is not fully understood, e.g. an ageing population, planned changes to the benefits system
- Some issues of organisations become over-reliant on CBT funding, and more could be done to support these groups
- Need to consider if CBT always has the track record and expertise to assess applications appropriately

- The impact of changing demographics, and movement of poverty to outer-London boroughs needs to be understood further in terms of inequalities and poverty experienced
- Hard to prioritise workloads when there are so many funding priorities
- Some civil society organisations are really struggling in the current funding climate, despite doing vital work – CBT should be as much of a support to these organisations as it can be, hence the need for variety in its approaches

### **Summary of Staff One-To-One Discussions**

9. In addition, staff were asked for feedback in groups and one to one discussions relating to CBT as an organisation. The overarching feedback is presented below, along with a S.W.O.T summary:

### **Staff Roles and Skillset**

10. Staff shared insights into the experience they have gained prior to joining CBT, and some colleagues continue to work or volunteer in a variety of roles alongside their CBT work.
11. Colleagues have worked in civil society, funding, non-departmental public bodies (NDPB), private and public sector organisations. Some colleagues have managed grant programmes of varying sizes, including grant making to individuals. They are linked to a wide range of stakeholders, listed in the longer report.

### **Staff Perspective on CBT**

12. *CBT's mission to 'tackle disadvantage in London through grant making, social investment, encouraging philanthropy and influencing social policy'* was a main driver for colleagues choosing to work at CBT. The CBT brand and its links to various networks such as London Funders, CASS Business School, BAMER Funders Alliance, Corston Alliance etc. was considered positive too. Reference was made to colleagues valuing the fact that CBT bridged communities and strengthened the sector, often backing interesting ideas and organisations with its funding.

### **Staff Workload**

13. The grant portfolios are mixed in terms of size, location and theme. There was some discussion as to whether or not portfolios should be distributed differently, and this is an area that needs to be explored further.
14. Staff were seeking as much flexibility, consistency and clarity as possible in terms of the internal processes used to distribute CBT's assets.

## **Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis of CBT**

### Strengths

#### Grant making best practice:

- Independent, but linked to the Corporation
- Flexible grant-making: nine priorities are akin to gateways
- Can fund other kinds of groups, not just charities
- Core funding and multi-year funding available
- Consistent levels of grants made annually
- Fairly clear themes labels, definitions and criteria for grant making
- Improved website has led to improved applications
- CBT listens to grant holders and stakeholders
- Funding also committed to research and strategic investments
- Consistency in grant making as one person filters the initial applications and coordinates paperwork submitted to committee

#### Staff team:

- Diverse skill set
- High retention rates
- Staff have pushed against some of the more conservative values within the Corporation
- Good levels of communication and teamwork
- Strong ability to maintain relationships with stakeholders and grant holders
- Staff are well linked to a wide range of stakeholders

### Weaknesses

#### Purpose and role of CBT:

- Lack of clarity on if the funding is for the sector, for Londoners or for both
- Improvements in capability and capacity building offer from CBT are needed

#### Data and information:

- Data is collected but unclear on its use
- GIFTs (CBT's grants management software) is not used effectively to support with workflow
- Filing systems need to be implemented fully and too much paperwork is generated currently

#### Policy and influencing:

- Data is not used to influence the funding priorities fully
- CBT should reach out more to local, regional and national policy makers, including unusual suspects
- CBT has highlighted some thorny issues, but perhaps at time has erred towards caution in doing so

#### Effectiveness of current funding:

- Priorities range between being too ambitious/not ambitious and too specific/vague

- Is there a duplication of effort amongst CBT's work and that of other funders?
- Nine priorities are too many
- Social investment and grant making is too disconnected
- Policies need reviewing regularly to ensure they reflect the processes being used and enable effective working practices
- Assessment process is possibly too long
- One size fits all approach to grant making means that work for small/larger grants can feel disproportionate
- Consistency in how a matter is managed within a grant isn't guaranteed
- Grants Officer (GO) portfolios are generic
- GO roles are expanding, but admin function is not expanding accordingly

### Opportunities

- More could be done to showcase the work of grant holders
- CBT could be more 'strategically responsive'
- CBT could be engaging with a wider range of stakeholders
- CBT could use others to distribute its funding or promote its work
- The role of the Corporation in CBT's work needs to be more fully understood
- Consider more proportionate approaches to grant making, including possibly a small grants programme
- More joint working between CBT and the Corporation to review the best possible internal processes are implemented

### Threats

- The Corporation and CBT should work hard to ensure its operating principles are better aligned
- The relationship between the Corporation and CBT requires further development to elicit the best possible outcomes for all
- CBT can become lost in the wider Corporation brand, and within the Corporation it can become lost as it has a separate website etc.
- In some cases, staff characterised as being not self-reflective enough, negative and operating in a bubble
- Is there enough staff capacity to take on work, and can the levels of disparity in the portfolios/workloads be sustained?

### **Consultation**

#### **Summary of Stakeholders Involved To-Date**

15. CBT has been building the evidence base for its next strategy through working collaboratively with Londoners and key stakeholders linked to its work. Stakeholders have been engaged through face-to-face group and one-to-one meetings; attending and contributing to various conferences, workshops and meetings; commissioning an independent grantee perception survey through the Center for Effective Philanthropy (227 anonymous responses received – see above); launching an online survey open to all; and



through our social media hashtag #BridgingLondon. This is a conversation that will continue until the next strategy is agreed, and beyond.

16. The details of the Strategic Review were also promoted at the following events, but no lists exist of the exact people in attendance:
- a) **London Conference, 16.11.16** – A large number of people engaged with us directly at our exhibitor stand, and through the social media hashtag for the event #LonConf2016. The conference was attended by mostly private sector organisations, as well as a good range of civil society and public sector colleagues.
  - b) **Greater London Volunteering Conference, 18.11.16** – CBT co-hosted a workshop on funding and CBT's Strategic Review, and 50 people mainly from the civil society sector, attended the session.
  - c) Since August 2016, CBT have engaged with over 500 people to help inform its thinking. Appendix 4 outlines the details of over 300 named people who have contributed to the review, and briefly summarises how they have been engaged.

### **Summary of External Meetings**

17. Formal 'conversations' have been convened with a range of external audiences, broadly categorised as:
- a) Londoners
  - b) Grantees
  - c) Civil society organisations – charities, sector support (infrastructure) bodies, CICs, not for profits, housing associations etc.
  - d) Policy makers – with a focus on London and communities of interest
  - e) Local Government – at an individual borough level, but also at a GLA and London Councils level
  - f) Funders – national, local, regional and sector support bodies for funders like ACF and London Funders
  - g) Social Investment Market
18. The notes from these meetings have been published on the CBT website [www.citybridgetrust.org.uk/strategic-review](http://www.citybridgetrust.org.uk/strategic-review).
19. The common themes emerging from these discussions included:

### **Funders**

20. The power imbalance between funders and those they fund was considered a real issue facing many of those engaged in the review process. Whilst many agreed that some form of imbalance will exist, due to the involvement of an exchange of assets, the imbalance could be addressed through funders exhibiting the following behaviours:

- a) **Being more transparent and proportionate in their approaches** – Funders should thoroughly examine what they are asking for, and why, from groups. If they are not using information then it should not be requested. Funders need to be acutely aware that they do not place unrealistic and unnecessary demands and pressures on the groups they fund, resulting in them becoming both helpful and unhelpful to an organisation's survival.
- b) **Having a clarity of vision and purpose** – Funders should have a clear vision and mission that they are pursuing, which is clearly expressed and to which they ensure that they hold themselves accountable in terms of measuring the impact that they are having through their investments. It was felt that funders should work more collaboratively and pursue an ambition to operate more effectively as an ecology/ecosystem – in order to make it easier for other stakeholders to work with them.
- c) **Knowing your asset base** – Funders should make better use of their monetary and non-monetary asset base, in order to create change in pursuit of their vision.

#### Future of Civil Society

21. There were frequent discussions on the financial burdens civil society organisations currently face; exacerbated further due to the rising levels of demand on their services. Many felt that the growing levels of inequality and poverty that disadvantaged and marginalised communities face is resulting in the sector facing a crisis/tipping point. Some common themes linked to these discussions included:

- a) **Innovation and the 'tried and tested'** – Many agreed that a better balance needs to be struck between the desire to fund innovation and the desire to fund proven models that have worked over many years. Stakeholders explained that they understood the need for innovation, as the same needs manifest themselves differently over time. However, in order for innovation to be done well, it was felt that it required headspace, collaboration, time and real leadership in the sector, and that the notion that this does not require intensive resourcing is incorrect.

It was also felt by the majority that supporting tried and tested methodologies, with a clear evidence base and learning that has been built up and applied over time should be celebrated more. Whilst it was understood that this work would always need to be open to adapting in response to its environment, it was agreed by most that a seemingly dismissive attitude to tried and tested approaches by funders was inappropriate.

- b) **A Community and Voluntary sector that thrives** – There was passion and ambition throughout so many of the discussions, with stakeholders making it clear that they were committed to ensuring the survival of the sector. Many felt that this could be best achieved through better collaboration within the sector, as well as the need for the sector to reach out to and better connect to

other sectors (private and public) – thinking of itself as an equal partner, rather than an adversary.

- c) **Support to civil society organisations** – Many expressed their concerns about the sector's ability to thrive, particularly due to the continued reductions in the availability of civil society support, predominantly through local infrastructure organisations such as volunteer centres etc. The need for support to be agile and multi-disciplinary was prioritised, but many felt that this could be best pursued by funders, civil society organisations, local authorities, communities etc. working in partnership over a sustained period of time.

### Life for Londoners

22. London and Londoners were spoken about in a myriad of positive ways, with many referencing the breadth of communities represented within the city, London's history and its future. Expressions of anxiety and fear about the future of London following the political and economic unrest in 2016 were cited in most meetings.
- a) **Speaking truth to power** - The need to support Londoners and those supporting them to use their voice and to take on leadership roles, in order to express their experiences and to strive for change to happen was discussed regularly. This was often linked to discussions on the need to develop a more positive narrative about being a Londoner, and living in London, both for those living in the city, as well as for those outside of London in other parts of the UK and globally. Whilst most stakeholders took pride in living or working in London, many expressed their concerns that the city was becoming inaccessible to many (including its current inhabitants) in terms of access to jobs, housing, affordable transport, public services etc.
  - b) **The most unequal city in the world** – London was regularly described as being a city of divides between the 'haves' and 'have nots'; resulting in the need for Londoners to be supported to pull together in order to create more community cohesion and resilience. Many stakeholders referred to the fact that London has the highest concentration of billionaires than anywhere else in the world. The economic inequalities were considered to be the cause for many parts of London changing dramatically and becoming inaccessible to those that were born and raised here. Changing demographics within communities were seen as positive, but many agreed that the confidence they had felt that London was incredibly positive in embracing its diversity had been eroded by the increase in hate crime in 2016.
  - c) **Understanding systems** – Much of the stakeholder feedback centred on the need for the complex systems in which Londoners exist to be more joined up. This was expressed in many different ways, and most agreed that if those within the system took a more collaborative and person-centred approach they would be able to elicit the best possible outcomes for Londoners. Many felt that simply seeking to support someone through the arbitrary label that is applied to them, e.g. older person, LGBTQ person, someone in debt, a minority etc. results in a lack of joined-up approaches, a higher likelihood of

those in need cycling in and out of crisis situations and failing to reach their goals and potential.

### CBT's Approaches

23. CBT was discussed in positive terms in many of the meetings held to-date, and was seen as a much-needed part of the London funding landscape. Some of the discussion points relating to CBT's approaches that were commonly referred to included:

- a) **What CBT does well** - There was lots of positive feedback relating to CBT's application and funding processes, transparent strategic review processes and its staff etc. CBT was considered supportive and generous as a funder by many stakeholders.
- b) **CBT in the future** - CBT was encouraged to have a clearer vision about its work going forwards, ensuring that the vision is clear, ambitious and measurable. Many also felt that in times of crisis/near crisis, the need to utilise CBT's links to other funders and sectors etc. was considered essential. There was also criticism of some of CBT's processes in terms of the application process, the number of themes, and the lack of awareness of the breadth of CBT's work in terms of grant making, social investment, encouraging giving and influencing public policy.

CBT was encouraged to support London and London's civil society to thrive, and that in order to achieve this, CBT must exercise: a commitment to helping organisations thrive/sustain themselves with confidence and flexibility; a commitment to capability and capacity building; a resolution to be more pragmatic and realistic in its approaches; and a promise to lever its non-monetary and monetary assets more effectively. The need to build collective voice and leadership within the funding ecology, civil society, London and its communities was regularly referred to also.

- c) **Opening doors** - Many felt that CBT's links to other sectors was something that needed to be considered carefully, in order to ensure that it benefits Londoners and civil society organisations. It was also felt by many that CBT should renew its ambition to herald a new age of giving in London and to increase the overall levels of giving - which have remained static for some time.

### **'Straw Person' First Draft Strategy**

24. Since the beginning of this year, your Head of Strategic Review has spent time reviewing the above inputs and connecting with a variety of stakeholders including researchers, the Strategic Review Project Steering Group, the CBT officer team, and your Chairman and Deputy Chairman for their feedback and guidance. This work has informed a 'Straw Person' first draft strategy which is attached at Appendix 5.

25. This draft strategy will form the basis of a discussion in the CBT Committee following a short presentation. The intention is that it will evolve through feedback from you, CBT and CoLC officers and a wide range of external stakeholders from multiple sectors. The feedback will be gathered in a transparent and collaborative way. It is hoped and expected that the feedback will be rigorous and robust as it is through this that the final strategy will be developed to be the best that it can be.
26. The key points to highlight are:
- a) At its heart this draft strategy's vision can be simply described as 'Bridging Divides'. The vision set out proposes that CBT's belief should be a London where disadvantaged and marginalised individuals and communities are supported to not just survive, but to thrive too. It asserts that CBT wants to reduce the inequalities that they face too. The mission proposed is that CBT uses all its knowledge, networks and assets to champion London's biggest asset – its people. The draft strategy proposes that this city can only work for everyone once the divides are bridged and the inequalities tackled.
  - b) The proposed strategy enables CBT to take a vision and values led approach to its funding decisions. This means that CBT is looking to partner with organisations who share our vision and values. CBT has funded incredible organisations over the years, and the strategy expresses CBT's desire to work more equally with organisations it supports in order to find the solutions to the divides that it hopes to bridge.
  - c) The strategy that CBT sets out for 2018 will have changed by 2023. There is so much uncertainty ahead, in terms of: Brexit, a general election, a mayoral election and the overwhelming feedback from stakeholders is that there are communities and civil society organisations that are in crisis. It is important therefore to have a strategy that is flexible and committed to adapting and learning: which looks at where it is making progress and where it needs to change.
  - d) This proposed strategy provides CBT's partners with a toolbox of different funding approaches, and a 'funder plus' programme which should help its partners to thrive too. The approaches proposed will be diverse, using both CBT's monetary and non-monetary assets in a way that is fair, representative and proportionate.
  - e) It is proposed that CBT considers funding through the following funding priorities:
    - Place based funding
    - Addressing inequalities
    - Transitions
    - Fairness and voice
  - f) It is proposed that ideas that could be supported through these areas will be broader and less defined than CBT are currently used to. However, by adopting a values and vision led approach to funding our partners, CBT can

be sure that it will work with great organisations doing great work. Over time CBT will learn from the ideas it is supporting linked to these themes and use these to inform more tightly defined areas of support it may wish to consider supporting too.

## Proposed Next Steps

27. The proposed next steps planned for the Strategic Review are set out below. It is recommended you review the proposed next steps and consider if they need amendment or addition – in particular how you would like to engage with/be updated on the refining of the strategy in the coming weeks?

28. The intention is to work with the CBT Committee and officers, CoLC staff and external stakeholders to develop the next iterations of the strategy shared with you today. A final strategy will be submitted to the CBT Committee for approval in May 2017.

29. Proposed Next Steps for the Strategic Review (SR):

January	
30th	Draft strategy shared with CBT Committee, via board papers
31st	Update the Communications Strategy for the SR, to prepare for: Work in February aimed at internal communications campaign, and CBT committee engagement, via: Committee meeting, Member's Briefing and Member's Breakfast event.
February	CBT Committee to review and feed back on the draft funding strategy. Taking on board the discussion from CBT Committee, the next iteration of the draft to be prepared and consulted on with external and internal audiences. The priority will be to initially connect with the CBT Committee, CoLC Member's, CoLC staff and then begin engaging face-to-face externally with external stakeholder audiences.
6 <sup>th</sup>	Activities will include, but are not limited to: CBT Committee Meeting – with a date agreed as to when the draft strategy can be published online
9th	Youth Sector 2020 Panel (Organised by London Youth)
10th	Publishing Rob Bell and Collaborate CIC research on to SR website pages
March	Sufina to continue testing draft funding strategy with external and internal audiences.
7th	Work to be undertaken to engage Member's via a Member's Breakfast (7 <sup>th</sup> ), as well as through Member's Inductions (following the March elections).

April	Sufina to amend strategy following results of CBT Committee feedback, Member engagement, and wider consultation process, and to publish this on to CBT website.
May	Sufina to work with the CBT Committee and your Chief Grants Officer to agree resource needs to deliver new funding strategy, and to then seek approval from the CBT Committee to agree the strategy. The strategy will exist as one version which can be used with all stakeholders, both internally and externally.
11th	CBT Committee Meeting
June	Sufina to continue working with CBT Committee and CoLC staff to prepare to take the strategy to the CoLC Court of Common Council  Plans to be finalized in terms of timeline for implementing the strategy, as well as consideration given as to the actions needed from June 2017 onwards to help prepare the team/others for the next strategy.
20 <sup>th</sup> July	Agreement of CoLC Court of Common Council
August	Contingency

### **Appendices:**

Appendix 1: Away day write up

Appendix 2: Literature review, by Olivia Dix

Appendix 3: Grantee perception survey summary

Appendix 4: Named stakeholders engaged in Strategic Review, as at January 2017

Appendix 5: 'Straw Person' first draft Strategy

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# CITY BRIDGE TRUST



## COMMITTEE MEMBERS AWAY DAY

20<sup>th</sup> October 2016

# DELEGATES

Alison Gowman (Chairman)  
Ian Seaton (Deputy Chairman)  
Karina Dostalova  
Stuart Fraser  
Marianne Fredericks  
Vincent Keaveny  
Vivienne Littlechild  
Jeremy Mayhew

David Farnsworth (Director)  
Sufina Ahmad  
Karen Atkinson  
Rob Bell  
Kyro Brooks  
Olivia Dix  
Rebecca Green  
Martin Hall  
Sandra Jones  
Scott Nixon  
Ciaran Rafferty  
Philippa Sewell  
Tim Wilson



# ALISON GOWMAN, CHAIRMAN OPENED THE MEETING

Welcome to the CBT away day. I am very grateful to members for committing so much time this week to CBT matters.

These are uncertain times and in this context we are making a renewed pledge to a fairer London, a Five Year Review and introducing the hashtag #BridgingLondon. This leaves us plenty of scope for today's meeting which is about our Quinquennial Review.

I heard the other day of three men on a hike really exhausted they came to a river with a raging torrent and seemingly un-crossable. All three fell on their knees to pray for a solution ... and you won't be surprised to hear that it was the one God turned into a woman who came up with the practical answer! Today we need all to bring our thoughts and ideas to the table to be refined through discussions and debate.

The video we have just seen by Respond (the making of which we funded and was intended to be hard hitting) tells us about the experiences of young disabled children who are living lives that we cannot imagine.

We all come here from our own background, experience, stories with our prejudices and peccadillos - these are all assets as we discuss the future direction of the CBT. I want you to bring these nuggets to the table - your connections/histories/ contributions and add them to the Quinquennial Review process. I think it will be helpful to find out and build on all these networks and links - be they in our roles in the City Corporation or our wider and previous experience and personal background. We can then begin to see how these can assist in the wider context of our 5 year review.



#BridgingLondon



# CONNECTIONS & NETWORKS

## CITY BRIDGE TRUST

Members exchanged information about themselves and the connections and networks that they bring to their role with City Bridge Trust.

### IAN SEATON

- Bar (Criminal Justice)
- City experience
- Livery (former Master of Girdlers)
- Director of Crown and Manor Boys Club in Hackney
- Strong interest in St. Giles Trust
- Interest in support for children on the edge of Care and improved educational performance
- Donation Governor of Christ's Hospital
- Chairman of City of London Boys School
- Interest in pressures on school age children
- Extensive Committee experience
- Interest in education, bursaries and tackling disadvantage, apprenticeships

### ALISON GOWMAN

- Solicitor with connections to a range of law firms, especially property
- Corporation experience and other Committees (Police, Culture, Irish Society)
- Strong arts interests especially in theatre
- Green finance
- Sustainability
- Road safety
- Methodist
- Homelessness (have been Trustee of organisations in this space)
- Magistrate
- Risk
- Social investment
- Former Trustee of Soane Museum
- Current Trustee of Museum of London
- Barbican resident and knowledge
- City of London School for Girls
- Strong interest in mental health
- Livery companies



## VIVIENNE LITTLECHILD

- Law (criminal) with especial interest in recidivism
- Samaritan
- Interest in substance misuse, prevention, impact on families
- Magistrate for 12 years
- Interest in prisons
- Good neighbour and provision of support especially to isolated older people
- Governor and Donation Christ's Hospital
- Experience of care provision
- Support and mentoring for young people
- Extensive arts experience
- Extensive Committee experience
- Mayflower 2020
- Promotion of London Metropolitan Archives
- Strong interest in outreach work, especially for arts
- Governor of Freemans and safeguarding, child protection governor

## STUART FRASER

- Life experience and other charities (local and national)
- Fundraising
- East End overspill – visiting tower blocks in danger
- People with mental health problems
- Lack of access (transport)
- Blackheath, Lewisham (including Lewisham Council)
- Changes to Local Government
- Knowledge of the City and contacts

## KARINA DOSTALOVA

- Director of Communications – our messages/ marketing
- Groups newsletters to reach members
- Queens Park
- Deputy Chairman of Hampstead Heath
- Links to other Committees and other parts of Corporations (widen our focus)
- Have run a charity and linked to others – knows how they work (good and bad!) and one with Royal patron
- Have been on a failed charity/misappropriation of funds (importance of money handling process)



## JEREMY MAYHEW

- Strategic and analytical skills
- Trying to ensure the focus on bigger themes rather than too much micro
- Lots of governance experience
- Networks in political and regulatory role – balance between public/private/not-for-profit
- Sees opportunities/wants to find more effective ways of doing things
- Experience as Chairman

## VINCENT KEAVENY

- Banking and Finance – DLA Piper
- City of London Law Society (Chairman)
- Livery companies
- Former Master of the Solicitors' Livery Company
- Tennis (member of Queens Club)
- Corporate donor
- Trustee Actors Touring Company
- Chair of Trustees Exaudi, contemporary music ensemble
- Trustee Soane Museum
- Married 23 years
- Board member City of London Boys School
- Samuel Wilson's Loan Trust
- Thinks strategically

## MARIANNE FREDERICKS

- Family – insurance brokers
- Campaigned for Memorial Park
- Interested in arts and drama and dancing
- Supports nursery and ballet schools, helps with fundraising
- Aldgate and All Hallows Trust
- Supports website for alumni in schools in Tower Hamlets
- Mitchell Trust
- Baker and Firefighters Livery companies
- Children at Trinity School for Arts
- Licensing Forum across London
- Homelessness and discouraging begging
- Experience with media, campaigns, strategy





# DAVID FARNSWORTH

## 5 YEAR STRATEGIC REVIEW

As the Chairman said, the focus of today is the City Bridge Trust's 5 year strategic review. It is indeed a time of considerable change: Brexit, a new Prime Minister, a new Mayor of London, and soon, a new President of the United States. Given this changing context, any new strategy will need to be flexible.

In May, you (the Committee) agreed the approach to your 5 year review and its resources. At the Trust's dinner on Tuesday, the Chairman launched the 5 year review. Today you will hear about the work we have done to date towards this review, have an opportunity to reflect on what you can contribute to the review and discuss how you hope the review will progress.

You will shortly hear from Sufina Ahmad, on secondment from the Big Lottery Fund, as our Head of Review. Sufina will be working with you, me, the team and external stakeholders to ensure that the review is comprehensive, relevant, timely and effective. You will then hear from Olivia Dix who has pulled together the research and data on the needs of Londoners through the prism of disadvantage (the document circulated in advance of today). And finally, you will hear from Rob Bell who has been reviewing best funder practice in the US, Europe and Australasia to inform our own future practice.

My hope for this review is that it is deeply anchored in the needs of disadvantaged Londoners, that we make sure we consider and make use of all our assets and that we challenge ourselves to critique what we do



well, what we need to improve and how we might learn from others to be even more effective. The outcome of the review should be an ambitious strategy, anchored in need, which ensures we make the most of the privilege and responsibility of being London's largest Independent Funder.

# SUFINA AHMAD

## STRATEGIC REVIEW

Sufina Ahmad, Seconded working on the Strategic Review, talked about her work and the timescale of the Review.

In September and October 2016, one-to-one and group meetings were held with the CBT team to learn more about the work being done currently. The Project Steering Group, made up of external colleagues and David, met in September 2016. In addition a communications plan to support the review has been developed and three pieces of research commissioned analysing need in London, funding best practice and scoping CBT's role in London's funding ecology.

Following the successful formal launch this week at our dinner the review is now more externally facing with information available on the CBT website and a hashtag 'Bridging London'. In November and December 2016 eleven external facing conversations with a range of different audiences have been planned. These conversations, alongside the three pieces of research that have been commissioned, will form the basis for a draft funding strategy in January 2017.

From February 2017, CBT will again consult with relevant audiences externally and internally to further iterate and finalise the strategy. The strategy will show what CBT strives to be, the rationale for what we seek to support and how CBT intends to implement the strategy. It is hoped that by April 2017 there will be a final strategy, leaving sufficient time to ensure the agreement of the CBT Committee to proceed, and approval from the Court of Common Council by the end of Summer 2017. The strategy will also include a timeline for implementation as some parts of the strategy will not go 'live' immediately.



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### Some of the points made in the discussion following Sufina's presentation included:

- How is the Trust working with the Corporation, its Trustee, and individual departments such as EDO? We need to demonstrate clear linkage and a partnership approach.
- We don't necessarily have the answers but the strategic review process will inform the way ahead and make sure that we are asking the right questions of ourselves.
- We need to ensure that any future research undertaken is not duplicating existing research and adds real value.
- We should be identifying the needs of Londoners and hone our 'offer' accordingly, ensuring it dovetails with our own identity/ethos. This could be funding



less 'popular' but necessary charities/charitable areas.

- We need to ensure we get 'added value' – encourage charities to make joint funding bids, or link/merge wherever possible to the benefit of all. CBT could have a role in facilitating this.
- The involvement of Members is crucial given they are responsible for agreeing strategy . We need to be imaginative in how we engage Members including, and beyond the CBT Committee: for example, using 'straw men' to focus discussions and obtain clear outcomes/steers.
- We must ensure that the review is evidence based at all stages.
- CBT should engage with stakeholders early on in a variety of formats to ensure we engage with all the necessary groups and organisations.
- How are we identifying funding gaps and should we direct our efforts towards those (i.e. capacity building which has seen a fall in funding support over recent times)?



# OLIVIA DIX

## LITERATURE REVIEW

Olivia Dix, Consultant, talked about the Literature Review and an analysis of the needs that underly the Strategic Review.

Olivia began with a brief description of what she had been asked to do and what she had not been asked to do. The Literature Review would form part of the evidence base for the 5 year strategic review and the brief was to focus on the needs of Londoners, through the prism of disadvantage, and not potential solutions. Because of this, the extent of the problems could look overwhelming but, though not part of her brief, much of the research she referenced did have suggestions for solutions.

Picking up on a previous conversation in the meeting, she said that overall there was a lot of interesting research out there. Part of her brief was to recommend, if necessary, further areas of research for CBT to commission. At this stage, she does not think further research is needed though there may be specific pieces CBT wants to commission further on in the review process, when the themes and approaches over the next five years are clearer.

She noted that it is important to realise the interconnectedness of needs and that categorisation is to some extent artificial. However, it was necessary within the Literature Review to make the document easy to use for staff, Trustees and stakeholders, enabling them to use the references to delve deeper into a topic. It is also important to keep both a gender and an ethnicity lens on all issues affecting Londoners. One example of interconnectedness of issues in a disadvantaged group is refugees and migrants. Some or all of them could be seen as disadvantaged under nearly all her headings; from health to housing to education to hate crimes and discrimination.

There were some very good overview documents and she would recommend, for example, the Joseph Rowntree Foundation UK Poverty: Causes Costs and Solutions published in September 2016. This detailed



report just gets a mention in her Review but the executive summaries at least (the main report is 350 pages long) are essential reading for an overview of poverty in the UK.

She had been asked to pick out a few interesting bits from the Review and gave a health warning that these examples did not represent priorities, nor suggestions for priorities. They were things that had struck her on re-reading the Review.

The cost of housing is a very familiar problem to everyone. She was interested in the statistics on a move from the concentration of poverty in the inner city to Boroughs in outer London, driven by high housing costs in the inner-city. There is some dispute about how fast this is happening and concern that attention might be diverted from remaining pocket of inner-city poverty, but the movement affects everything from transport, attracting staff to low-paid jobs and/or unsocial hours to cultural life - traditional artists' quarters such as Hackney are now unaffordable.

She found the increase in mental health problems,

for which there is a good evidence base, sobering, as is the increase in suicides and attempted suicides. She noted that there were initiatives within the City of London to help people in work with mental health problems and to reduce stigma.

A Needs Assessment on Sexual and Domestic violence in London (including child sexual abuse), commissioned by MOPAC and NHS England, had the potential to change the approach to these issues and to create a more effective, integrated service. This would make it more affordable and, crucially, better for the victims. She was particularly interested in this work because there is a potential opportunity here to add value to statutory work, without replacing statutory duties, supporting for example peer support groups or sexual abuse of young men.

She concluded with a couple of examples related to Civil Society organisations. The first was the shifting role of Community Foundations, because of the difficult funding climate and the impact this had also had on Councils of Voluntary Services. This had led in one case to a Community Foundation taking on funding and support for larger organisations than they had done traditionally and in another to difficult decisions about what kind of organisations they funded locally. The second example was the actual

and potential impact of technology – perhaps the only area where innovation was happening at a very fast rate. In 2012 there were 100billion Google searches a month, demonstrating how people were turning to the Internet first for information. However, although there was enormous potential for Civil Society, both to provide better services and to improve the internal efficiency of their organisations, producing test-driven user –focused technology products required expertise that was in great demand and very expensive. This represented a considerable challenge for Civil Society organisations and their funders.

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#### **Some of the points made in the discussion following Olivia's presentation included:**

- There is a plethora of research and no further research is needed at this stage
- Technology is the one thing that has most changed since the last review and will have changed most by next
- Civil Society/social Isolation is critically linked to mental health, suicide and to technology





# ROB BELL

## GRANT MAKING

Rob Bell, Consultant, presented research into different approaches to grant making.



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### I am helping CBT with three things:

1. Drawing to the Trusts attention other approaches being taken
2. Looking at social investment in more detail
3. Examining how organisations mobilise other resources – people, convening power, networks, influence

Approach is important. Your grant making approach and how you operate embodies values and generates potent message

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### My work is at an early stage but I will share 3 things today:

1. Attempt to describe **flaws in current system** – replete with opportunities to lead the field
2. Point to opportunities for you to buck the trend and draw on what we know are the hall marks of successful approaches
3. End with some questions need to ask and keep asking when embarking on this process

*This is not neat and tidy – its provocative, is not a comment on CBT's way of working, but seeks to draw together insights from elsewhere*

## A few points worth making at the start, some contentious and you may wish to challenge:

Tricky social issues that impact on people most are stubborn and resistant to conventional approaches – need to **blend assets if really want to make a difference. Grant makers can choose – adapt or freeze / continue old ways working. Consequence = impact (or not)**

**Funders come in for a lot of criticism** – lack of accountability, lack of external pressure to improve or achieve more, its possible to moderately or chronically under achieve without anyone being aware or challenging.

**BUT, being an effective funder is tough** – Carnegie, Buffet, Gates all said philanthropy much harder than making money. Diana Leat – commentator – hit the nail on the head when she said - *“Spending money is easy. Spending limited resources effectively and efficiently is extraordinarily difficult. Doing so in ways that please everyone is impossible as long as demand exceeds supply...”*

### Philanthropy – direction of travel

Tension – and responses driven by anxiety

Step in to plug gaps, respond to high volume v focus more ??

Develop more specific focused criteria v turn over much more decision making about funding to others, peers, communities ??

Fund worth proven interventions V back ventures that are likely to underachieve ??

Work with others, combine resources V protect identity, brand, independence

Not a zero sum game, false dichotomies

Good news – you CAN design and rationalise a range of approaches – key is to communicate clearly, resource appropriately, design admin (reporting eval application procedures) that enhance don't undermine charities work.

This is my attempt to set out the current flaws in the system of grant making – the Anglo Saxon one, particularly UK and US Philanthropy.



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## Flaws in the system – opportunities to get better

Charities are forced to **navigate** enormous variability in the practice of foundations – they spend inordinate amounts of time figuring it out, searching for clues.

**Application and reporting requirements** – they still don't often enough take into account the size of the grant and vary accordingly.

Grant funding takes insufficient account of the **true costs** of getting and managing the grant

Grant seekers tend to bear the brunt of **funders' outsourced burden** – taking on too many of the admin tasks (some perhaps unnecessary) during the application process and the evaluation of the work.

**Trust** – is undermined when the application process feels bureaucratic, heavily automated – 'used car salesmen'

**Reporting** – reports are onerous to produce, they rightly come at the end of the work period, the organisations is moving on to the next thing, they are generally read by one person.

**Fundraising gymnastics** – where the application is complicated, criteria convoluted, charities develop adaptive behaviours – they find a work around, target trustees, try to by-pass staff, use their networks.

**Streamlining** – removing and then adding in extra screening steps.

**Time drain** – for both sides

**People** – shift is away from contact. Narrative is anxiety driven – greater needs, more applications, need to plough on. But charities want people contact – early.

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## I think this is a point worth pausing to look at...

This is the most profound point, it will re-surface later.

We under use our human assets, our people and their skills at building relationships, spotting opportunities, forming partnerships, initiating new things.

Instead, many talk in terms of being 'swamped', bogged down in process, operating under a perception that risk should be carefully minimised through long and far reaching due diligence processes, not as aware as they'd like at what is going on out there. This is madness...

One US writer Paul Connolly -

*"grant-makers can enhance their work by combining objectivity with passion, control with agility, proactivity with responsiveness, top down with bottom up, and numbers with stories"*

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## Successful philanthropic approaches – the terrain you might wish to spend time in before designing or committing to one grant making approach or another.

Knowledge and networks: Be very good at identifying new needs and help find solutions to old problems – this needs your people to be connected, gathering and reviewing data, building a picture of future possibilities. Really invest in building your field credibility and knowledge.

### **Speed and flexibility: – easy to build processes that stop you being able to react quickly and flexibility.**

To really go after opportunities and be able to move quickly, you need to retain flexibility and fast track routes

Own your strengths: Really understand what your strengths are and work them – your connections, knowledge, history, people. To meet major social challenges you need more than money

Be prepared to give up control, to achieve more - Think about how you use your funding to really empower - You could – for arguments sake – allow people across London to have much more direct control over grant spending, and in doing so not only arguably better respond to needs but also build capacity and empower as you do it.

**Don't forget that London is a city of mainly very small charities.** Recognise what they need and develop approaches that are much lighter and simpler. Don't force them off track to meet your requirements. Decide early, back them and be light touch.

Talk about human relations skills as a key area of competency for staff – working well with people, being collaborative. Don't recruit great creative experienced people then bury them under a mountain of paperwork.

Aspire to be known for having great, wise people who build productive relationships Your reputation is only build through your people. Recruit and develop people who are creative, people orientated, entrepreneurial – as well as people who are great on processual aspects.

Remember, charities want people contact – early. Don't drift into automation and then be surprised at the consequences. You need to free people up to do this.

**Build trust** – recognise that all your processes send out messages and signals about what kind of funder you are. Be one that really connects to people in London setting things up to achieve social good.

**Find organisations whose values align with you**, with impressive leaders who can adapt as needed, and let them know you will back them, in the long haul if necessary. Stick with them. Make understanding what your partners / grantees need a priority. Prioritise their needs, not yours. Manage expectations about what you can offer. Be prepared to be a thinking partner if you think it helps you with your wider work.

Lean philanthropist: Every funder says they take risks, but hardly any really do because they spend so much time weeding out the small, scrappy, confused, unlikely, half baked ideas that come to them. But there is something to be said for taking a '**lean philanthropy**' approach – fund more, light touch, expect majority to fail. Let people try things out, learn, adapt.

**In your day to day grant making - Really pay for the cost of the work** - take account of the true costs of getting and managing the grant, take on as much of the admin as you can

If you are going to streamline then stick to it and be relentless. (Grant makers find it hard to let go or assessment steps)

**Develop application and reporting requirements that are proportionate** to the size of the grant and the

level of risk involved. Be prepared to outsource the oversight of blocks of grants – let someone pull together learning, and light touch manage.

**Reports – look at ways to dramatically reduce this.** Get the financial accountability bit sorted and then be creative about how you extract and share learning.

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## Finally 5 questions and keep on asking about your grant making

1. Does your grant making approach align with your intentions – types of org and grant, sufficient mix of ideas and organisations, right amount of risk?
2. Does our process strengthen and support grantees (and those applying for funding?)
3. Are your grants structured to be successful? – do grants really support grantee needs, are impact expectations set at the right level
4. Are we efficient in our internal processes – what is the minimum we need to know before making an award?
5. Are we communicating effectively? Are you expressing you intentions, how you do things, the different types of funding and relationship type - clearly, explicitly

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## Some of the points made in the discussion of Rob's presentation included:

- Looking at the historical role of the Corporation, we are at our best when we are bold
- Grant making could be compartmentalised into different portfolios i.e. some operating to different models, with higher risk, more longer term funding agreements
- We should not be replicating work undertaken by other departments in the Corporation – we need to improve alignment
- Members know the Corporation and Officers know about grants; we work well together
- Risk and reputation – we are operating in the public domain so it is obvious if we make a mistake negative Press coverage will follow. However, it is also an opportunity to have a conversation, to explain what we do and why we do it. Risk will always be there, no matter how many questions we ask of a grantee beforehand. It is a case of putting forward calculated risk projects to trustees and requesting approval
- Should CBT be allocating a proportion of its' funding to higher risk projects, or more innovative ideas?
- We need to promote increased collaboration between smaller organisations and have them pool funding and resource – Is there a role for CBT in this?
- Should CBT increase the level of online tools and information that it provides?
- We should be improving the public accessibility of our grant making decisions.



# STRATEGIC REVIEW QUESTIONS

The meeting then considered questions relating to the Strategic Review and came to the following conclusions:

## What are the main strengths of the Trust and what can we do to build on them?

**Reach and connections** Building on Grant Officer's links to themes and boroughs:

- Understand the positives of the connections we have across all 3 sectors: private, statutory and community/voluntary
- Do more to enable grantees access to networks and other funders and other sectors
- Connect to the work of the COLC and private sector more than we do currently.

### Expertise

- Challenge ourselves to constantly be reviewing how we work.
- Have deeper relationships throughout the funding life cycle
- Cultivate ideas ... work with others/groups to support ideas for funding
- Use our data differently and keep sharing it – spot trends etc. and do something to broker solutions.
- Build staff capacity to work across the application process.

Continued.



## Leadership and influence

- Be innovative – utilise all links to all sectors and networks to learn about the issues that Londoners want us to support
- Take judgements and trust based approaches spreading staff time across the whole of the application process
- Practice what you preach – Trustees to do mock applications as impetus for changing processes and understanding the processes more.

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## What do you see as the most significant achievements of the Trust over the last decade? What more could we do to increase our impact?

### Achievements:

- Growing reputation; tries to recognise need for sustainability
- Innovative
- Closeness to field, issues
- Significant social investor

### Increasing impact:

- Build flexible grant making approach
- Funding more in the digital tech. field, particularly re help for the elderly and isolated
- Growing grants and non-monetary assistance packages
- Make Social Investment less siloed
- Learn more from grants made; articulate and share knowledge. Use convening power to shine light on pressing social issues.



## What do you see as the balance between the funding of established work and new and different and approaches? Why?

- There can be innovation within established organisations
- There is already some flexibility
- Not adverse to risk but needs to be properly presented in the context of City of London Corporation.
- CBT could pilot more new approaches.

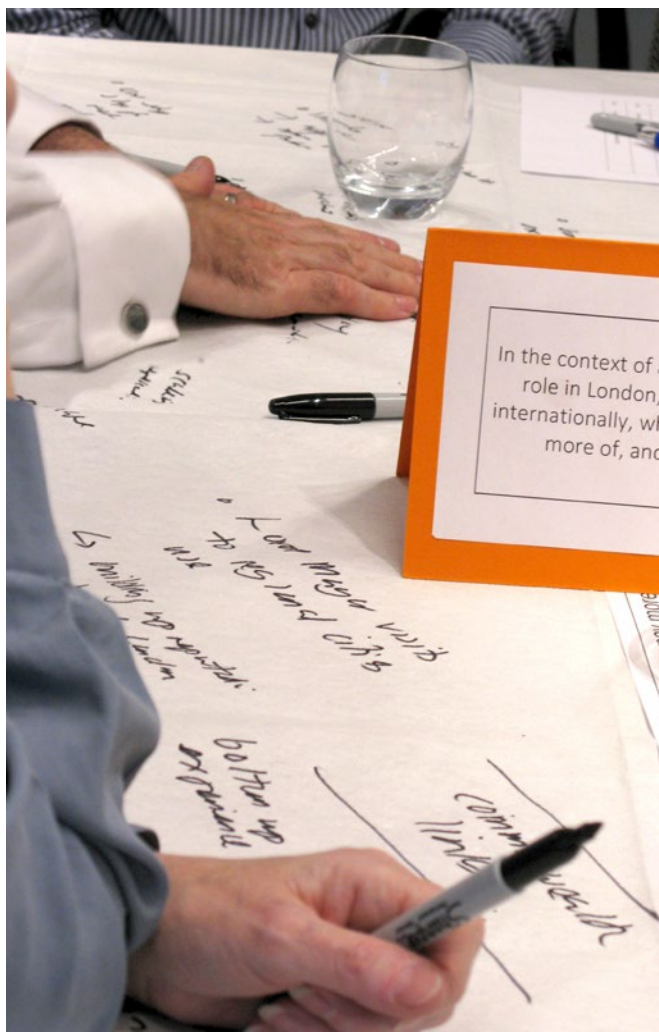
## In the context of a wider leadership role in London, nationally and internationally, what should CBT do more of, and what less?

- CBT should do less unilateral funding and take an even more networked/collaborative approach for example through London Funders or partnership such as the Early Action Funders' Alliance or a partnership on technology
- CBT should work more across the sectors
- CBT should embrace and support organisations to embrace technological advances which can enhance the services/impact of operations (whilst mitigating the risks)
- CBT should make more of the leverage of its £20M to draw in extra resource for charities
- CBT should pull together the strands of its work more effectively through greater definition of outcomes e.g. grant-making, social investment and influencing public policy
- CBT should work more closely with Mansion House and the Corporation to agree a joint giving strategy
- CBT should link better with the Lord Mayor's visits to other cities internationally and nationally - this may be through the giving agenda/through sharing good practice about tackling disadvantage in cities (also consider Commonwealth Links)





- With the rise of Cities around the world and CBT being situated in the pre-eminent global city to show leadership through sharing what works and trying new approaches whilst linking with counterparts such as New York and Shanghai at the learning/sharing level (also possibility of spend through social investment internationally)
- CBT should amplify the Lord Mayor's brand and use combined convening power to strengthen links with other cities
- CBT should make more of its links with Wembley National Stadium Trust and its links with communities throughout England
- CBT should learn lessons from the Baring Foundation's International work
- CBT should use innovative approaches to inform other funders
- CBT should consider becoming more of a one stop shop repository for learning and research - learning and research should be better shared
- CBT should not dilute its connections with the neighbourhoods and communities throughout all the London Borough - unlike the Corporation, there should be a bottom up approach and this should be core to the Trust's work
- CBT should consider helping some of its grantees more intensely - for example drawing on the assets beyond the money - perhaps building stronger links with the CASS business school and centre for charitable effectiveness.



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# Literature Review

## City Bridge Trust

**Author: Olivia Dix**  
**October 2016**



## **Introduction**

City Bridge Trust (CBT) is conducting its Strategic Review (SR) of grant giving, related activities and advocacy, which will set its strategy for the five years from 2018. City Bridge's Trust's vision is a fairer London, its mission is to support disadvantaged Londoners through grant-making, social investment, encouraging philanthropy and influencing public policy and its values are independence, inclusion and integrity. The principles for developing this Report were: it will be conducted through the prism of 'tackling disadvantage in London'; the analysis of need will be a zero-based approach, entered not only through consideration of what CBT is doing already, and it will be collaborative, consultative and transparent. The Review is being conducted in collaboration with Trust for London and London Funders.

## **The Literature Review**

City Bridge Trust is commissioning a number of reports to help form the evidence base for its Review. The Literature Review is one of the early reports. It is not intended to be exhaustive, to analyse any of the information cited or to identify research offering solutions, although some of the sources quoted do contain recommendations. Rather the Review is intended to give an overview of needs and to provide signposting to reports and websites that give accessible information on the current context in London and its needs. These include, but are not confined to, areas of need addressed by CBT's current funding programmes. The Review methodology is desk-based research and conversations with stakeholders listed in Appendix A. It is hoped the Review will also be of use to CBT's external stakeholders.

Disadvantage, arising from poverty or inequality is often the result of a combination of factors that interconnect and impact in different ways on different groups of people. However, in order for this Review to be as usable as possible for CBT staff, Trustees and stakeholders, needs and disadvantage have been categorised, accepting that there is often considerable overlap.

While London has unique features among English cities as the capital city, the centre of political life, its status as a world leader in financial services and with the largest population of a UK city, it is subject to national trends and policies and not all useful research and data is disaggregated at a regional level. This Review therefore also references national data and research.

## **Context**

This is an unprecedented time politically and economically in the UK with the Referendum decision on June 24th 2016 to leave the European Union. This political uncertainty is compounded by the change of Prime Minister and the splits within the Labour Party taking place at the time of writing this Review.

There is no consensus on what the effects of Brexit will be in the medium to long-term but agreement that, at least in the short-term, there will be considerable



economic uncertainty. It is not clear when exactly the UK will officially leave the EU but the leaving period will undoubtedly take up a great deal of government time and other government business may be slower. A Research Brief by the City of London Corporation says that the impact on London will be more pronounced than elsewhere in the UK, in particular as a consequence of the high concentration of services, jobs and exports dependent on access to the EU market, and the relatively large and skilled EU workforce<sup>1</sup>. A blog by the City of London Economic Development Unit discusses the particular effect on London of potential restrictions to migration, quoting research that demonstrates the role EU citizens play in some sectors. Potentially as many as 94% employed in hotels and restaurants, and three quarters of EU construction workers would not meet existing visa requirements. EU workers are also heavily represented in the financial sector<sup>2</sup>.

The number of uncertainties make it difficult to predict the consequences for the voluntary and community sectors of the exit from Europe, but it is possible it will lead to less funding being available from public and foundation sources, particularly if interest rates go down. There is no suggestion that the UK is about to move out of the period of austerity that is impacting globally, with the subsequent shrinking of the State and cuts in public expenditure that London Councils characterise as unsustainable<sup>3</sup>. NCVO, in its first briefing since the Referendum on the likely impact on the voluntary sector states that 'it is likely that the impact in the short-term will be over-estimated but the impact in the longer-term will be under-estimated'<sup>4</sup>. There will be a need for the voluntary and Community Sector to track carefully the legal implications for it of the Brexit negotiations<sup>5</sup>.

For City Bridge Trust, with the City of London Corporation as its sole Trustee, there are opportunities and risks. There are opportunities to use the networks of the Corporation in the City of London, nationally and internationally, to help rethink what London might be outside the EU. There are also risks that the potential turmoil within the City of London itself, during the process of leaving the EU and beyond, might absorb time and energy in a way that could detract from CBT's ability to make full use of its unique connections with the Corporation.

During the next five years following the Review, and perhaps earlier, there will also be a General Election and a Mayoral election. All these changes mean that, while statistical information and research based on the last few years included in this Review remain valid, the conclusions and recommendations of some future-facing research may be less robust.

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<sup>1</sup> London and Brexit, (July 2016), Research Briefing, City of London Corporation

<sup>2</sup> Davison L, The implications of Brexit for London – a focus on migration (August 2016)  
<http://colresearch.typepad.com>

<sup>3</sup> [www.londoncouncils.gov.uk/node/28157](http://www.londoncouncils.gov.uk/node/28157)

<sup>4</sup> NCVO Public Policy June 2016, Brexit: Implications for the Voluntary Sector

<sup>5</sup> Discussion with Matthew Smerdon, Director Legal Education Foundation

## Civil Society

With a shrinking State, cuts in funding for public services and the continuing global recession, the role of civil society is likely to grow and it is being increasingly relied on to be a partner in delivering public services. There are, however, questions about whether civil society is sufficiently robust and well-funded to meet future challenges. Many civil society organisations have seen drastic reductions in funding, particularly from public bodies, and this puts more demand on independent funders to meet increased need and to consider how and which organisations they fund.

The London Community Foundation<sup>6</sup>, for example, which has traditionally worked with organisations with an income of £100k or less, has seen increased demand from local middle-income charities (circa £500k income) that have lost income and had to reduce their services. The closing of some Councils of Voluntary Services (CVSs), or the reduction of their offers has meant the Community Foundation has moved in places into the capacity- building and sustainability work previously carried out by CVSs. The East End Community Foundation, working in three London boroughs with around 4,400 to 5,000 civil society organisations has seen a substantial increase in applications from small organisations catering for specific ethnic communities. This has led to discussions about how far integrated organisations should be prioritised and whether continued funding of organisations for specific communities where there was no overwhelming reason for doing so (youth football teams for example) damaged community cohesion.

The funding situation makes it imperative to develop different methods of engagement and funding. There is some movement towards place-based giving and fundraising. This can enable funders to have a deep understanding of a locality and the residents within it and lead to more informed giving, to the funder having a role as a 'knowledge factory' and the ability to create effective networks change<sup>7</sup>.

More capacity building and use of the venture philanthropy model would enable voluntary sector organisations to take full advantage of other forms of financial support like social investment. Foundations could also help by being flexible in providing unrestricted grants and being prepared to work with other types of investment, blending grants with loans to make the latter cheaper for organisations.<sup>8</sup> Financial and non-financial support from business is becoming increasingly important, often through Corporate Social Responsibility (CSR) programmes, though CSR programmes are often confined to areas of interest for the companies, for example employability, financial literacy and finding the talent that may be missed. After a survey of companies' interests, the Lord Mayor's Appeal Charity office categorised them in four pillars: skills, fair, healthy and inclusive<sup>9</sup>. [Heart of the City](#), which supports CSR, has now extended its reach from the City to all London Boroughs.

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<sup>6</sup> Conversation with Victoria Warne, Deputy Director, London Community Foundation

<sup>7</sup> Conversation with Kristina Glen, CEO Cripplegate Foundation and Cahir London Funders

<sup>8</sup> Conversation with Evita Zanuso, Financial Relations Director, Big Society Capital

<sup>9</sup> Conversation with Caroline Wright, Director Lord Mayor's Appeal.

## **How the sector delivers its services: a digital world**

A major challenge for many VCS organisations of all sizes and missions is getting to grips with digital technology and how it can change and improve the way services are delivered. This requires appropriate support for Trustees and charity leaders as well as technical support. Organisations need to adapt how they present information, to align with changes in public behaviours about seeking information and support, and to maintain visibility. Many people now turn to digital information first: for example, there are 100 billion plus Google searches a month. They need to consider how they could improve services through digital delivery. An issue is the need to create new products that are test-driven and user centred - the Agile approach – which requires finance to explore challenges and find solutions. This approach is commonly used in the private sector but is expensive.<sup>10</sup>

## **Independence**

There are serious concerns that the VCS is losing the independence that is key to its definition and values, partly because of the increasing contract culture in public sector funding of the sector. The Baring Foundation's Panel on the Independence of the Voluntary Sector, in its final report in 2015<sup>11</sup> says that the voluntary sector's independent voice, freedom of purpose and action are being undermined by a negative political climate.

## **Changing roles**

There is agreement that the sector needs to reassess its role in the light of the rapid changes in the environment in which they are operating. There is no consensus on what its future role should be, though a considerable overlap in views. Contributions to the discussion include [Making Good](#)<sup>12</sup>, *The future of 'doing good' in the UK*<sup>13</sup> and *Boldness in Times of Change*<sup>14</sup>. The Baring Foundation is coordinating a group of eight leading independent funders, including City Bridge Trust, to fund an Independent Inquiry into the Future of Civil Society, led by Julia Unwin, with work beginning in early 2017.

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<sup>10</sup> Conversation with Dan Sutch, Co-founder and Director of the Centre for Acceleration of Social Technology (CAST)

<sup>11</sup> An Independent Mission: the Voluntary Sector in 2015, (February 2105), Panel on the Independence of the Voluntary Sector, Baring Foundation

<sup>12</sup> Making Good; The Future of the Voluntary Sector, A collection of essays by voluntary sector leaders (December 2014), Civil Exchange

<sup>13</sup> Sodha S, The future of 'doing good' in the UK, Big Lottery

<sup>14</sup> Murray p et al, Boldness in Times of Change; Rethinking the Charity Sector for the Future (July 2016), New Philanthropy Capital

## Infrastructure organisation

An important part of the discussion is the future role of infrastructure organisations (that provide support to VCS organisations). The National Association for Voluntary and Community Action's (NAVCA) [final report](#) of its Commission<sup>15</sup> looks at the national picture while *The Way Ahead, Civil Society at the Heart of London*, a CBT-funded publication, focuses on London<sup>16</sup>. Both are concerned that civil society in general may fail to keep up with the pace of change and that infrastructure organisations need to operate differently and change their relationship with local groups to act as a lever for resources and a voice for community groups.

## London the City

London is a vast, exciting, vibrant and dynamic city with a population estimated by the GLA to have been 8.7m in 2015 rising to 9.3m by 2021. It has a larger proportion of young people between 25-34 than in other UK cities and less people over 50<sup>17</sup>. There are a wide variety of cultures and ethnicities with more than a third of the population from Black and Minority Ethnic communities (BAME). London's creative industries were estimated to be worth £34.6billion in 2012<sup>18</sup> and it attracted a record 31.5 million tourists in 2015 according to the Office of National Statistics (ONS). As a financial centre the City of London's contribution to the UK's national income (or Gross Value Added, GVA) was estimated at £45bn in 2014, while London accounts for £334bn or 22% of the UK's GVA<sup>19</sup>.

## Poverty and Inequality

London is also a city of stark contrasts and inequalities. The number of people living in poverty, according to the GLA intelligence Unit, was 2.2m in 2013/14<sup>20</sup>. London has a disproportionate number of the UK's most deprived neighbourhoods (defined as Lower Layer Super Output areas - LSOAs). There are significant differences in poverty levels and other disadvantage between inner and outer London boroughs, between individual boroughs and within boroughs. These cannot be detailed in this Review but some examples are given in Appendix B.

There is no single definition of poverty. The UK government uses 60% of median income as the poverty line. The current London Living Wage, calculated by the GLA, from the Office of National Statistics (ONS) figures is £9.40 an hour and is voluntary for employers. Both the GLA and London's Poverty Profile look at income after housing costs (AHC), given the exceptionally high cost of housing in London.<sup>21</sup> In its recent publication, the report of its four year Solve Poverty Campaign, The Joseph Rowntree Foundation (JRF) uses the definition 'when someone's resources, mainly material resources, are well below those required to meet their minimum needs,

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<sup>15</sup> Independent Commission on the Future of Local Infrastructure Change for Good (January 2015) NAVCA

<sup>16</sup> Sen S and associates, *Civil Society at the heart of London* (April 2016), London Funders

<sup>17</sup> Aldridge H et al, *London's Poverty Profile 2015*, New Policy Institute, Trust for London

<sup>18</sup> GLA Working Paper 70 (October 2015) *The creative industries in London*

<sup>19</sup> Centre for Cities and Cambridge Econometrics, June 2015

<sup>20</sup> GLA Intelligence Unit *Poverty in London 2013/14* Intelligence update 10 2015

<sup>21</sup> Aldridge H, Born T, Tinson A, Macinnes T, *London's Poverty Profile 2015*, Trust for London and New Policy institute

including participating in society'<sup>22</sup>.

The Cambridge Dictionary defines inequality as 'the unfair situation in society where some people have more opportunities money etc. than other people'. In terms of unequal income, London contains the highest proportion (15%) of people in the poorest tenth nationally and the second highest proportion (16%)<sup>23</sup> of people in the richest tenth. JRF has produced a new tool, the [Inclusive Growth Monitor](#) to measure the relationship between prosperity and poverty. It's finding that London experienced the highest amount of change in prosperity levels and the lowest amount of change in inclusion levels between 2010 and 2014, challenged assumptions that prosperity and inclusion are automatically correlated<sup>24</sup>. A recent report by JRF [Overcoming deprivation and disconnection in UK cities](#) looks in detail at the reasons for continued deprivation and disconnection from economic growth from the perspective of housing and labour market interactions in the UK's most deprived neighbourhoods, including in London. Its findings include that some areas have a 'double disconnection' from their local employment and housing markets, that local jobs do not necessarily mean local employment for residents of a deprived area and there is often a mismatch between where people live and where jobs are located. Despite various government initiatives, at present, there is a missing link between the goals of city-regional economic growth on the one hand and persistent neighbourhood deprivation on the other hand and these patterns persist over time<sup>25</sup>.

There are also inequalities in treatment and opportunities arising from prejudice and discrimination. It is important to consider these when looking at general needs. The Runnymede Trust has published a [report](#) on ethnic inequalities across London and by Borough<sup>26</sup>. [The Fawcett Society](#) and [The Women's Resource Centre](#) have useful reports and run campaigns on specific issues related to gender inequality. [Still Out There](#) is a recent summary of unmet needs of the LGBT communities in London that showed significant levels of poverty and discrimination. A meeting of LGBT organisations in July 2016, co-hosted by CBT, Trust for London and London Councils, also identified, amongst others, the need for a better, stronger, infrastructure – properly resourced - and increased isolation and lack of social spaces due to many commercial clubs and pubs closing.

Many of the key facts and statistics on poverty and inequality and its underlying issues are covered in [London's Poverty Profile](#), the City of London Corporation's [2015 Deprivation Briefing](#)<sup>27</sup>, the [GLA webpage on equalities](#), the final reports of the [London Communities Commission](#) and the [London Fairness Commission](#). The [London Datastore](#) is an open data-sharing portal contains over 500 datasets on issues relating to London. The [Centre for Cities](#) looks at how London's economy is performing and the key policy issues facing the city. It also has an interactive data

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<sup>22</sup> UK Poverty: Causes Costs and Solutions (September 2016) Joseph Rowntree Foundation

<sup>23</sup> London's Poverty profile

<sup>24</sup> Beatty C, Crisp R, Gore T, An inclusive growth monitor for measuring the relationship between poverty and growth, May 2016, Joseph Rowntree Foundation.

<sup>25</sup> Rae A, Hamilton R, Crisp R and Powell R, Overcoming Deprivation and Disconnection in UK Cities (August 2016) Joseph Rowntree Foundation

<sup>26</sup> Elali F and Khan O, Ethnic inequalities in London: Capital for all (March 2016) Runnymede Trust

<sup>27</sup> City of London Corporation, Deprivation in London: secondary research briefing paper (January 2015)



tool to compare London to other UK cities.

The Joseph Rowntree Foundation uses the concept of the 'Poverty Premium': the idea that the poor pay more, for example through paying for energy through more expensive prepayment meters - and Government figures show that 10.6% of households in London are in fuel poverty.<sup>28</sup> The poor also pay more because of a lack of banking facilities for direct debits and more in fixed costs due to low consumption. However JRF's [Poverty and the cost of living](#) research cautions that the poverty premium does not only affect those in poverty, nor is its effects consistent. The JRF Solve Poverty campaign's report has extensive analyses of poverty in the UK, future trends and how it could be solved<sup>29</sup>.

### **Indebtedness**

Indebtedness causes problems, not only because of the debt itself, but also because it affects mental health, the ability to work and look for jobs and because of the link with debt and other harmful events, such as losing a home or relationship breakdown<sup>30</sup>. Analysis of their client base by debt charity Stepchange, demonstrates that Londoners are more at risk of problem debt than the UK average, regardless of where they live in the capital and relative deprivation levels. Clients who live in the more deprived London boroughs tend to be struggling to pay essential bills, particularly their rent, and this is mainly due to drop in income. In contrast, in boroughs with low levels of deprivation clients' financial difficulties are more likely to be linked with higher levels of unsecured debt, mostly through credit card and overdraft use.

### **Food Poverty**

There is no official definition for food poverty or household food insecurity, as it is also called, but, with the growth of foodbanks, it is an area of growing concern and there is a consensus that the problem is not diminishing. The Trussell Trust reports that it gave out 110,364 3-day emergency supplies to people in London in the financial year 2015-16 and that the national use of its foodbanks had increased by 2%<sup>31</sup>. Its latest statistics show that low income has risen as a referral cause from 22% to 23%. Foodbanks report that the main issues that cause working people to be referred were low wages, insecure work, high living costs and problems accessing working benefits. The Trussell Trust is not the only organisation providing emergency food and the number in need is higher. The All Party Parliamentary Group on Hunger instituted an Inquiry into hunger in the United Kingdom in 2014 with a report in December 2014 and in June 2015 a progress report on action on its recommendations six months later<sup>32</sup> [Beyond the Foodbank London Food Poverty Profile 2015](#) outlines the gaps in the safety net of initiatives to reduce food poverty as well as focusing on initiatives that help. The [final report](#) of an Independent

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<sup>28</sup> Sub-regional Fuel Poverty England (2014) Dept. of Energy and climate Change

<sup>29</sup> UK Poverty: Causes Costs and Solutions (September 2016) Joseph Rowntree Foundation

<sup>30</sup> London in the Red: A briefing on problem debt in London, (2015) Stepchange

<sup>31</sup> <https://www.trusselltrust.org/news-and-blog/latest-stats/>

<sup>32</sup> Feeding Britain A Strategy for zero hunger in England Wales Scotland and Northern Ireland (Dec 2014) All Party Parliamentary Group on Hunger

Feeding Britain six months on, a progress report on the work of the All Party Parliamentary Inquiry into hunger in the United Kingdom

Commission on Food and Poverty<sup>33</sup>, hosted by the Fabian Society, looked at the relationship between food and poverty and how a fairer food system can be built for people on low incomes. It uncovered a crisis of food access for many households in the UK.

Food poverty can also cause health problems. The London Poverty Profile reports that the proportion of obese 11 year olds is higher than the England average in 28 boroughs and, generally speaking, poorer boroughs have higher levels of obesity. However food poverty is not the only factor in obesity, which is a combination of different family circumstances and the external environment.

## **Housing and Homelessness**

The uniquely expensive nature of London's housing market is a significant contributor to poverty and disadvantage. *London's Poverty Profile* summarises the problems as: high costs of London property both to buy and to rent in the private sector; overcrowding; lack of affordable new-build homes; higher landlord possessions than the rest of England and homelessness.

A recent survey by YouGov and Shelter found that people across the UK were skimping on food and other essentials to pay housing costs. Almost half of working families in London cut back on essential food and clothing to pay for their home - equivalent to more than half a million families. One in seventeen working parents goes to the extreme of skipping meals, and one in six are putting off buying their children new clothes or shoes to help cover their housing costs. Over half of working parents in London are already struggling to meet their rent or mortgage payments, leaving them vulnerable to any small change in income<sup>34</sup>.

A significant change in the housing sector is the rising proportion of people living in private rented accommodation. The Resolution Foundation [reported](#) in August 2016 that home ownership in England is now at 63.8%, the same levels as 1986. London is second to Manchester as having the lowest percentage of home ownership. The London Fairness Commission's final report notes that 1 in 4 people now live in rented accommodation and the number is increasing. It argues that there is a problem with the enforcement of regulations on private landlords. The Centre for London publication [Housing and Inequality in London](#)<sup>35</sup> reports that the proportion of people in poverty after housing costs living in private rented accommodation increased by 10 percentage points between 2001-2011. [It argues these tenants are most exposed to changes in market conditions and most vulnerable.](#) The [final report](#) of the Crisis/ Shelter Sustain project, looks at the difficult experiences of homeless people being moved into the private rented sector<sup>36</sup>. The Centre for London report also says that, while an influx of higher- skilled workers into inner London has

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<sup>33</sup> [www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/adhocs/004828proportionofemployeejobsinlondonpaidlessthanthelondonlivingwageandthepovertythresholdwage](http://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/adhocs/004828proportionofemployeejobsinlondonpaidlessthanthelondonlivingwageandthepovertythresholdwage)

<sup>34</sup> Shelter Press Release 14th September 2016

<sup>35</sup> Travers T, Sims S, Bosetti N, (April 2016) *Housing and Inequality in London*, Centre for London

<sup>36</sup> Smith M, Albanese F, Truder J, *A Roof Over My head: the final report of the Sustain Project* (2014) Shelter/Crisis

significantly reduced the poverty rate in recent years, lower-skilled, lower-income families have moved to outer London. This is also discussed in the Smith Institute Report *Towards a suburban renaissance*<sup>37</sup>. However there remain significant pockets of poverty and inequality in Inner London.

The [Combined Homelessness and Information Network \(Chain\) report](#) for 2014/15 says that, in that period, 8096 people were seen sleeping rough by outreach workers, up 7% on the previous year; 5,276 of these were seen for the first time; 41% had UK nationality; 85% were male. 29% gave the reason for homelessness as being asked to leave by the person they were staying with, or eviction. [There has been a significant increase in young rough sleepers, with 1 in 10 aged under 26 \(830 young people\).](#)

## Employment and Unemployment

Unemployment in London is at a record low, at 5.8%<sup>38</sup>. However this figure masks the fact that the majority of people living in poverty are in a working family. The number has risen from 700,000 to 1.2m in the last decade<sup>39</sup>. Low pay is a major issue. The Office for National Statistics reported that in 2014 less than 20% of employees in London were being paid the voluntary London Living wage of £9.40 per hour<sup>40</sup>.

The Black Training and Enterprise Group has [statistics](#) on the higher black and minority ethnic unemployment figures at a UK level. There are more unemployed women than men by a factor of 11%<sup>41</sup>. One reason for this is the high cost of childcare. The 2014 London Childcare Report<sup>42</sup> says that childcare costs are 28% above the national average and maternal employment 15% lower than the rest of the UK. It argues that provision of affordable and flexible childcare is one of the most effective ways of reducing child poverty, as it enables parents to work or to extend their hours of work and move out of poverty. There are major gaps in provision for all types of childcare but these are particularly acute for those who work outside normal hours or irregularly.

The Learning and Work Institute has produced a report on the links between skills and poverty, which highlights the low levels of education and skills in the UK and notes that those with higher levels of skill are more likely to be in work and more likely to earn more<sup>43</sup>.

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<sup>37</sup> Hunter P, *Towards a suburban renaissance: an agenda for our city suburbs* (July 2016) Smith Institute

<sup>38</sup> ONS statistics March – May 2016

<sup>39</sup> London's Poverty Profile 2015

<sup>40</sup> Estimates of employee jobs paid less than the Living Wage in London and other parts of England. ONS, October 2105

<sup>41</sup> London Poverty Profile

<sup>42</sup> Rutter J and Lugton D, 2014 London Childcare Report, Family and Childcare Trust

<sup>43</sup> Skills and Poverty: Building an anti-poverty learning and skills system (September 2016), Learning and Work Institute



There is also concern about the rise in ‘zero-hour contracts’, where there are no guaranteed minimum hours, although a report by GLA Economics says that official estimates suggest there are around 70,000 people currently employed on zero-hours contracts in London. Despite the possibility of an underestimate in the statistics, zero-hours contracts account for a very small proportion of all employment in London<sup>44</sup>. However, while the flexibility of these contracts may suit some people, there are problems relating to employment rights and living standards where people do not have, or are not permitted by the employer to have, access to other alternative employment. It is noteworthy that the New Zealand government has recently banned all zero-hour contracts.

## Health and Social Care

The general direction of travel for the NHS is set out in its [\*Five Year Forward View\*](#)<sup>45</sup>. There is a focus on preventative measures and public health, patient choice, devolution and integrated care, set out in [\*Integrated Care and Support: Our Shared Commitment\*](#)<sup>46</sup>. While government policy is to integrate health and social care, London Councils say that by 2019/20, London boroughs will face a funding gap of £900 million in their adult social care budgets as they deal with inflation, new burdens and the growing number of people qualifying for state-funded care. How they will meet these demands is currently unclear<sup>47</sup>.

A recent report by the King’s Fund and the Nuffield Trust<sup>48</sup> paints a bleak picture of the future of social care for older people. It notes that access to care depends increasingly on what people can afford – and where they live – rather than on what they need, which favours the relatively well off and well informed at the expense of the poorest people. The report says that measures announced by the government will not meet a widening gap between needs and resources set to reach at least £2.8 billion by 2019. Public spending on adult social care is set to fall to less than 1 per cent of GDP and the potential for most local authorities to achieve more within existing resources is very limited and they will struggle to meet basic statutory duties.

The government is committed to health devolution. The *London Health Devolution Agreement of December 2015*<sup>49</sup> will pilot new ways of working across London’s large and complex health economy with the longer term aim for further devolution of London’s health and care to the London system.

Public Health England has produced a [review of health inequalities in London](#)<sup>50</sup> [with statistics presented graphically. It shows the variations in health outcomes across](#)

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<sup>44</sup> Mpepu M, The extent and consequences of zero-hour contracts and labour market casualization in London (August 2015), GLA Economics Note 45, GLA

<sup>45</sup> NHS England Five Year Forward View (October 2014)

<sup>46</sup> National Collaboration for Integrated Care and support, Integrated Care and Support : Our Shared Commitment (May 2013)

<sup>47</sup> Adult Social Care in London (November 2015) London Councils

<sup>48</sup> Richard Humphries et al, Social care for older people: Home truths (September 2016), the King’s Fund and the Nuffield Trust

<sup>49</sup> [www.gov.uk/government/publications/london-health-devolution-agreement/london-health-devolution-agreement](http://www.gov.uk/government/publications/london-health-devolution-agreement/london-health-devolution-agreement)

<sup>50</sup> Public Health England, Health Inequalities in London (October 2015)

[London](#), for example there are wide variations in life expectancy from birth between Boroughs with a difference of 3.8 years between those with the highest and lowest life expectancy for women and 4.1 years for men. The [Public Health England website](#) outlines the Public Health Outcomes Framework and contains a wealth of data including a snapshot overview of health for every local authority in England.

The [King's Fund](#) produces reports specific to London and [quarterly monitoring reports on the NHS](#). The [Nuffield Trust](#) produces a number of publications on London's health. The [Quality Watch](#) Annual Statement gives an independent view on how patterns of quality in health and social care are changing over time<sup>51</sup>.

## **Mental Health**

Mental health problems are a serious issue, accounting for 22.8% of health problems in the UK. Over half of mental health problems in adult life (excluding dementia) start by the age of 14 and 75% by the age of 18. [The Five Year Forward View for Mental Health](#), by the independent Mental Health Taskforce sets out the current context for mental health, the experience of users of mental health services and recommendations for the future<sup>52</sup>. The Mental Health Foundation's [Fundamental Facts](#) outlines the main issues in mental health in the UK

The Survey of Mental Health and Wellbeing, published in September 2016, suggests that mental ill-health may be increasing. It shows that one in three adults aged 16-74 with conditions such as anxiety and depression were accessing mental health treatment in 2014, up from one in four in 2007. Women were more likely than men to have reported common mental disorder symptoms (19% compared to 12%). There was also an association between common mental disorders and chronic physical conditions.<sup>53</sup> [The Cavendish Square Group](#), a collaboration of the ten London NHS Trusts responsible for mental health services in the capital and led by the CEOs, has produced the *London Mental Health Factbook* with key statistics for London including that over 900,000 adults in London are affected by a mental health disorder such as anxiety or depression and 1 in 10 young people have a clinically significant mental health problem, but just one in four will receive effective mental health care. An extreme manifestation of mental health problems is suicide and suicides and attempted suicides are increasing. In the year to date (October 2016) the City of London Police have dealt with more suicides and attempted suicides than in the whole of 2015, when the numbers had also increased from 2014<sup>54</sup>.

## **Disability**

The government's policy on disability is part of the Equality Act 2010, which legally protects people against discrimination in the workplace and wider society. The Office for Disability Issues helped create the [Disability Action Alliance](#), a cross-sector network of organisations committed to making a difference to the lives of disabled people. In London the GLA holds [bi-annual consultation meetings](#) held with

<sup>51</sup> Closer to Critical? Quality Watch Annual Statement 2015, (December 2015) The Health Foundation and Nuffield Trust

<sup>52</sup> The Five Year Forward View for Mental Health, A report from the Independent Mental Health Taskforce to NHS England. (February 2016)

<sup>53</sup> <https://digital.nhs.uk/article/813/Survey-shows-one-in-three-adults-with-common-mental-disorders-report-using-treatment-services->

<sup>54</sup> Conversation with Ian Dyson City of London Police Commissioner

organisations for deaf and disabled people in London, and from these has identified the areas of need to be addressed: accessible transport; availability of accessible housing; access to employment and education; access to the built environment; facilities and services for deaf and disabled Londoners; the right to independent living; equal access to health services and promoting disability equality and challenging discrimination. Continuing negative attitudes towards people with disabilities is a national problem. A [publication by Scope](#) reports that, of those surveyed, two-thirds of the British public feel uncomfortable talking to disabled people and one-fifth of 18-34 year olds have avoided talking to disabled people; over a third believe disabled people are less productive than others; a quarter (24%) of disabled people have experienced attitudes or behaviours where other people expected less of them because of their disability and over four-fifths of the British public believe disabled people face prejudice.

### **Learning Disabilities**

People with learning disabilities have poorer health than the general population, much of which is avoidable. These health inequalities often start early in life and result, to an extent, from barriers they face in accessing timely, appropriate and effective health care. The impact of these health inequalities is serious. As well as having a poorer quality of life, people with learning disabilities die at a younger age than their non-disabled peers.<sup>55</sup> The [Improving Health and Lives Learning Disabilities Observatory](#) has facts and figures about learning disability in England including needs and inequalities of access to care, health services and education. The [information](#) is given at local authority level in London.

### **Carers**

The percentage of unpaid care provided in London decreased between 2001 and 2011<sup>56</sup> but, according to the GLA, about 700,000 people in London support an older disabled or ill relative or friend. A report for Carers' week by [Carers UK](#) said that the life chances of many carers are damaged by inadequate support from local services. 51% of carers have left a health problem go untreated, 50% have worsened mental health, 66% gave up work or reduced their hours, 47% struggle financially and 315 only get help in an emergency<sup>57</sup>.

### **Social Isolation**

The quality and quantity of social relationships affects health behaviours, people's physical and mental health, and risk of mortality. Public Health England produced a [Practice Resource](#), which looks at social isolation across the life course. While often discussed in the context of older people, it can affect people at all stages of their lives. The report<sup>58</sup> distinguishes between social isolation: the inadequate quality and quantity of social relations with other people at the different levels where human interaction takes place (individual, group, community and the larger social environment) and loneliness: an emotional perception that can be experienced by

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<sup>55</sup> Improving Health and Lives Learning Disability Observatory

<sup>56</sup> White C, 2011 Census Analysis: unpaid Care in England and Wales 2011 and comparison with 2001 (February 2013) ONS

<sup>57</sup> Building Carer- friendly Communities: a research report for Carers' Week (June 2016)

<sup>58</sup> Duncan D and Bell R, Reducing Social Isolation across the Lifecourse, Practice Resource (September 2015) Public Health England and UCL Institute of Health Equity

individuals regardless of the breadth of their social networks. It notes that there are links between inequality, social isolation and health because many factors associated with social isolation are unequally distributed in society and many associated risk factors are more prevalent among socially disadvantaged groups.

## **Prison and Rehabilitation**

In June 2016 the prison population was 84,405. According to the Summer 2016 Bromley Briefings, produced by the Prison Reform Trust<sup>59</sup> violence, sexual assaults and rates of self-harm in prison are at the highest level ever recorded. [The Prison Reform Trust](#), the [Howard League for Penal Reform](#) and the [Centre for Crime and Justice Studies](#) produce research papers on a range of issues relevant to the penal system. [The Howard League for Penal Reform work includes](#) a [series of pamphlets](#) challenging preconceptions of the penal system. The Centre for Crime and Justice's work includes two projects comparing prison models and alternatives to prison across Europe. The [Corston Report](#)<sup>60</sup> is a review of women with particular vulnerabilities in the criminal justice system. [Women in Prison](#) produces research reports and briefings to back its campaigns to improve the situation for women in prison.

## **Education**

London's state Primary and Secondary schools are the best in the country. In parts of London, more than two in three adults of working age, have a degree or higher education equivalent and in 2015, according to Eurostat, London occupies 4 of the top 6 regions for graduates<sup>61</sup>. However, parents still feel the need for supplementary schools. In the UK there are between 3,000 to 5,000 supplementary schools, attended by up to 30% of migrant and BME pupils and run by volunteers. IPPR have published a report on the benefits of these schools<sup>62</sup>.

English courses for Speakers of Other Languages (ESOL) are essential for refugees and migrants and yet there have been year on year cuts to ESOL - by 55% since 2009. In addition to this decline in funding, England – unlike Scotland and Wales – does not have a strategy for ESOL, to set and measure progress against clear agreed objectives<sup>63</sup>.

## **Advice and Information**

Information from legal and advice and information services funded by CBT confirms that services are under increasing strain with a sharp rise in the number of clients and the complexity of problems. Changes to the benefit system are some of the

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<sup>59</sup> <http://www.prisonreformtrust.org.uk/Portals/0/Documents/Bromley%20Briefings/Summer%202016%20briefing.pdf>

<sup>60</sup> Corston J, The Corston Report, (2007), The Home Office

<sup>61</sup> <http://www.bbc.co.uk/news/business-37158445>

<sup>62</sup> Vidhya Ramalingam and Phoebe Griffith, Saturdays for success: how supplementary schools can support pupils from all backgrounds to flourish (September 2015), IPPR

<sup>63</sup> Let Refugees Learn: challenges and opportunities to improve language provision to refugees in England, (May 2016), Refugee Action

reasons for this increase. There is also evidence that people are not aware of their rights. [The Legal Education Foundation](#) funded an analysis of the findings of the first and second waves of the Civil and Social Justice Panel Survey (CSJPS) 2010 and 2012<sup>64</sup>. The findings suggest that public knowledge of the law is low, and that much of what individuals believe they know about their rights may be incorrect. They indicate that certain groups are more vulnerable than others in relation to both their ability to solve legal problems and the impact that these problems have on them. The Foundation also produces a yearly update on *Digital Delivery of Legal Services to People on Low Incomes*<sup>65</sup>.

## The Urban Environment

### Pollution

Air pollution in London, particularly NO<sub>2</sub> (Nitrogen Dioxide) remains a serious problem, despite the work done over the previous decades to improve the situation. A [Policy Exchange Report](#)<sup>66</sup> says that levels of PM (Air Pollution Particulate Matter) are now below European limits, but remain above WHO guideline levels in most of Greater London. NO<sub>2</sub> levels remain above legal limits across 12.5% of the Greater London area, in particular in Central London and close to Heathrow and major roads. Policy Exchange estimates that 25% of children in London attend schools in areas that exceed the NO<sub>2</sub> legal and health limits and 44% of London's workday population work in parts of London that exceed NO<sub>2</sub> pollution limits.

The issue of pollution near schools, particularly primary schools, was highlighted by the new Mayor in a recent [press release](#). The report quotes research by King's College London saying that air pollution is responsible for up to 141,000 life years lost or the equivalent of up to 94,000 deaths in London in 2010 as well as 3,400 hospital admissions. The [London Air Quality Network](#) (LAQN) is a comprehensive source of information on air quality with hourly updates and also publishes yearly summary reports<sup>67</sup>. The City of London's five year Air Quality Strategy outlines the particular pollution issues for the City of London<sup>68</sup>.

### Transport

Crucial to anyone living or working in a city is the availability of public transport. London has a good public transport system, which is increasingly accessible, and, under the Equality Act 2010 all buses, trains and taxis nationally must be accessible to disabled people by 2020. However the transport system is extremely expensive and is a significant unavoidable expense for people in low-paid jobs. The expense of transport decreases their disposable income and limits their access to the facilities

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<sup>64</sup> Pleasance P, Balmer N J and Denir C, How people understand and interact with the law, PPSR Cambridge 2015

<sup>65</sup> <https://www.thelegaleducationfoundation.org/wp-content/uploads/2016/05/Digital-Technology-Spring-2016.pdf>

<sup>66</sup> Howard R, Up in the Air: how to solve London's air quality crisis Part 1, (March 2016) policy Exchange, Capital City Foundation.

<sup>67</sup> Mittal L, Baker T, Fuller G, LAQN Summary Report 2014 (March 2016), Environmental Research Group, Kings College London

<sup>68</sup> Air Quality Strategy 2015 2020 (June 2015) City of London



and cultural institutions in London and, potentially, jobs. Buses are the cheapest but also a relatively slow mean of transport. A report on social isolation by Public Health England notes that poor transport links can create barriers to social inclusion whereas effective transport links can benefit social cohesion<sup>69</sup>. A research report for Tessa Jowell in 2015, quoted in the Independent, claimed that London had the highest public transport fares in the world, when compared with other global cities<sup>70</sup> and the London Fairness Commission says that the cost of transport is one of the three largest extra cost borne by Londoners (the other two being housing and childcare)<sup>71</sup>. The Mayor of London has [frozen all fares that are dictated by Transport for London until 2020](#) at an estimated cost of £640m [and 'hopper fares' enabling people to change buses within an hour using a single ticket have been introduced.](#)

### **Green spaces**

London has 35,000 acres of public green spaces – equivalent to 40% of its surface area – making it one of the greenest cities of its size in the world. [The GLA has a plan for a 'green infrastructure' across London](#)<sup>72</sup> [and the City of London Corporation, which manages has an Open Spaces Strategy](#)<sup>73</sup>.

[However many parks and green spaces across the UK including in London, are deteriorating often because of local authority budget cuts to Park maintenance budgets and reductions in staff](#)<sup>74</sup>. [This is despite an increase in their use by the public and the proven benefits of green spaces](#)<sup>75</sup>. [In addition, the number of playing fields available for sport is decreasing. The London Playing Fields Foundation reports](#) that London has 16% of the country's population but only 8% of playing fields [and](#) 20,000 playing fields have been lost since 1990, reducing both the potential for leisure activities and the health benefits of exercise.

### **Arts and Culture**

London has a world-class cultural life and arts and culture are a significant contributor to London's economy. For example the Arts and Culture Cluster in the City of London alone generated £225m of Gross Added Value for the City of London and supported more than 6,700 full-time equivalent jobs<sup>76</sup>. The major arts and cultures venues throughout London also have extensive education outreach programmes to schools, community groups and vulnerable and disabled groups. However there are concerns about the future. In an [article for Centre for London](#)<sup>77</sup> Tom Campbell notes that the high price of London property has dramatically reduced the availability of artists' studios, that those working in the arts are often poorly paid

<sup>69</sup> Duncan D and Bell R, Reducing Social Isolation across the Lifecourse, Practice Resource (September 2015) Public Health England and UCL Institute of Health Equity

<sup>70</sup> [www.independent.co.uk/news/uk/home-news/london-has-the-most-expensive-public-transport-in-the-world](http://www.independent.co.uk/news/uk/home-news/london-has-the-most-expensive-public-transport-in-the-world)

<sup>71</sup> London Fairness Commission, March Report 2016

<sup>72</sup> Natural Capital: investing in a Green infrastructure for a Future London, GLA

<sup>73</sup> The City of London Open Space Strategy, supplementary planning document (January 2015) City of London Corporation

<sup>74</sup> State of UK Public Parks 2016, Heritage Lottery Fund

<sup>75</sup> BOP Consulting, Green Spaces: the Benefits for London, (July 2013), City of London Corporation

<sup>76</sup> BOP Consulting, The Economic Social and Cultural Impact of the City Arts and Culture Cluster, (January 2013), City of London

<sup>77</sup> Campbell T, High Value, London Essays, Centre for London , Culture Issue 4 2016

and freelance and that the workforce is not representative of the population of London. In the same series of issues the steep decline in the number of music performance venues, a third since 2007 and artists becoming 'cultural commuters' are raised as problems<sup>78</sup>.

In the [London Appendix to the Arts Council England's Corporate Plan 2015-2018](#) it highlights its commitment to diversity, to access for all and specifically mentions working in some of the poorer London boroughs.

## **Making London Safer**

London is the most diverse area ethnically in the UK and one of the most diverse cities in the world with 36% of its population foreign born, including 24.5% born outside Europe and 22.1% of residents reporting that their main language was not English (1.73m)<sup>79</sup>. For many of London's population the diversity is part of the attraction of London life adding to its richness and excitement. However there is also worrying increases in the number of hate crimes and incidents affecting all minorities. These are officially defined by the Justice Department as *'crimes or non-criminal incidents which is perceived by the victim or any other person to be motivated by a hostility or prejudice-based on a personal characteristic; specifically actual or perceived race, religion/faith, sexual orientation, disability or trans-gender identity'*. The Mayor of London's Hate Crime Reduction Strategy 2014-2017 notes an increase in hate incidents over the last three years in all categories<sup>80</sup>. The Gay British Crime Survey 2013<sup>81</sup> reports that one in six LGBT people had been the victim of a hate crime or incident over the previous three years. The Metropolitan police report that anti-Semitic hate crimes increased from 39 to 56 between July 2015 and 2016.

## **Discrimination and hate crimes**

Discrimination and violence against towards migrants and refugees is a national issue. A report by the Ipsos Mori Social Research Institute on attitudes to immigration quoted a 2013 YouGov survey showing that 68% of people nationally considered immigration a problem for Britain<sup>82</sup> and this was borne out by the Brexit vote, with immigration control a major plank of the Leave campaign. Islamophobia is on the increase, with attacks having nearly doubled in the capital over the last two years<sup>83</sup>. For example, in its 2015 Annual Report, [Tell Mama, an organisation](#) that measures and monitors anti-Muslim incidents and supports victims nationally, notes that the number of 'off-line' incidents reported to it (in-person incidents between a victim or property and perpetrator) trebled from 2014-2015 to 437.

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<sup>78</sup> Shapiro S, The Great Disappearing Venues Disaster, ibid

<sup>79</sup> 2011 census

<sup>80</sup> A Hate Crime Reduction Strategy for London, (2014 -2017) Mayor of London's Office for Policing and Crime.

<sup>81</sup> Guasp A, Gammon A, and Ellison G, Homophobic Hate Crime: The Gay British Crime Survey 2013, Stonewall and Yougov

<sup>82</sup> Duffy B, Frere-Smith T, Perception and Reality: public attitudes to immigration (January 2014), Ipsos Mori Social Research Institute

<sup>83</sup> <http://www.dailymail.co.uk/news/article-3358535/Islamophobic-hate-crimes-London-nearly-doubled-two-years-Muslims-say-conscious-keeping-head-down.html>

The decision to leave the EU through the Referendum of June 2016 was followed by a surge in hate crimes, characterised by the Scotland Yard Deputy Commissioner as (having) “unleashed something in people where they felt able to do things that, let's be really clear, are illegal.” Before the Referendum the Met dealt with 25-50 offences daily. Between 24<sup>th</sup> June and 19<sup>th</sup> July 2016 it had dealt with 57-78 daily and made 400 arrests<sup>84</sup>. On 26<sup>th</sup> July the government published a hate Crime Action Plan and announced £2.4m of funding to provide increased protection for vulnerable places of worship<sup>85</sup>.

Continuing hate incidents and crimes and hostility towards refugees and migrants are a significant challenge to community cohesion in the capital<sup>86</sup>. The iCoCo Foundation has useful information about the theory and growth of community cohesion.

### **Sexual and Domestic violence**

The GLA has [recorded](#) an increase in sexual and domestic violence over the last year with an 8% increase in domestic violence and 9.1% in sexual offences. 76% of victims of domestic violence and abuse and 87% of victims of sexual violence were women. [Agenda](#), the alliance for women and girls at risk, has published an analysis of the experience of women who face violence and abuse nationally, based on data from the Adult Psychiatric Morbidity Service (APMS)<sup>87</sup>.

A comprehensive Needs Assessment on Sexual and Domestic Violence in London has been commissioned by NHS England and the Mayor's Office for Policing and Crime (MOPAC) from the consultancy MBARC and this will be publically available in Autumn 2016.

### **Trafficking**

The legislation covering human trafficking is the Modern Slavery Act, July 2015. In July 2016 the Prime Minister announced a further series of measures to tackle modern slavery including: a new taskforce led by the Prime Minister to oversee government action to end slavery; a review by her Majesty's Inspectorate of constabulary of the policing response to slavery and £33.5 million in official development assistance funding to tackle the issue in countries from which the UK sees a high number of victims.

According to the National Crime Agency (NCA) Strategic Assessment on the nature and scale of human trafficking in 2014<sup>88</sup>, the number of potential victims of trafficking nationally in 2014 was 3309 of whom 22% were children. This is an increase of 37%. The most common types of trafficking were sexual 34% and forced labour 32%. The

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<sup>84</sup> <http://news.sky.com/story/met-police-hate-crime-rises-after-brexit-vote-10506201>

<sup>85</sup> <https://www.gov.uk/government/publications/hate-crime-action-plan-2016>

<sup>86</sup> The iCoCo foundation has useful information about community cohesion <http://tedcantle.co.uk/about-community-cohesion/#bc>

<sup>87</sup> Scott S and Mcmanus S, DMSS, Hidden Hurt, Violence Abuse and Disadvantage in the Lives of Women (January 2016), Agenda

<sup>88</sup> <http://www.nationalcrimeagency.gov.uk/publications/656-nca-strategic-assessment-the-nature-and-scale-of-human-trafficking-in-2014/file>



assessment notes that the figures should be considered an indication of the nature and scale of human trafficking, since trafficking and slavery are hidden crimes. There is an assumption that the true figure for potential victims will be higher. An analysis in 2014 gave an estimate of between 10,000 and 13,000 potential victims of trafficking in 2013<sup>89</sup>.

## Digital crime

Although the digital revolution has brought many benefits it has also led to an exponential rise in fraud. The City of London Police is the national police lead on fraud and has noted in particular an increase in fraud on older people. These typically take the form of investment scams or scams aimed at getting people to give their bank or credit card details by telephone or email. Younger people tend to become victims of social media scams<sup>90</sup>.

## Children and Youth

Children and young people enjoy the same benefits and face many of the same issues as the rest of the population of a major conurbation. 700,000 children in London are living below the poverty line, 37% of all children in the capital. While poverty rates are higher for everyone in London than nationally, [this gap is larger for children than for any other group](#). Some groups of children suffer from particular disadvantages.

**Children in care** have specific problems. A [National Audit Office report in 2014](#) noted that demand for care is increasing. Local Authorities in England looked after 68,110 children (at the end of March 2013), the highest level for 20 years. Nearly two thirds (62%) of children are in care because they have suffered abuse or neglect. The report concludes that The Department for Education is not meeting its objectives to improve the quality of care and the stability of placements for children in care. The number of unaccompanied child refugees in the care of local councils, and often suffering severe trauma has risen dramatically. For example Hillingdon, which has Heathrow airport within its boundaries, looked after the largest total number of child refugees after Kent, rising by 22% in a year to 226 between 2014 and 2015<sup>91</sup>.

**Youth homelessness** is seen as a growing problem by service providers, although numbers are difficult to estimate as the way data is collected has changed and central government data only includes those who are found to be in a 'priority need' group, such as under 18s, care leavers up to the age of 21 and those with children of their own. Most single homeless people over 18 are therefore missing from these statistics. Centrepont commissioned the Cambridge Centre for Housing and Planning to produce a report estimating the scale of young homelessness nationally including the 'hidden homeless', people sleeping on friends' floors, sofa surfing or sleeping rough. The report estimates that in 2013/14 310,768 young people between

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<sup>89</sup> ibid p 9

<sup>90</sup> Conversation with Ian Dyson, City of London Police Commissioner

<sup>91</sup> <http://www.communitycare.co.uk/2016/01/13/huge-rise-child-refugee-population-leaves-many-councils-struggling-cope/>

the ages of 16 and 24 began the year homeless, or became homeless, of whom 17,111 accessed statutory or other homeless provision<sup>92</sup>.

In terms of health, there is a disturbing increase in **childhood obesity**. 1 in 5 children in London between the ages of 4 and 5 is overweight or obese and 2 out of 5 have unhealthy weight levels when they start secondary school. Children from the most deprived areas between 4 and 5 and 10 and 11 are twice as likely as those from the least deprived areas to be obese<sup>93</sup>.

**Children and young people with physical or learning disabilities or mental health problems** have additional challenges. [Young Minds website](#) summarises statistics on young people's mental health. The Children's Commissioner's [Lightning Review of Access to Child and Adolescent Mental Health Services](#) (CAMHS) raised concerns about children being turned away from CAMHS services or waiting a long time for treatment. In 2015 it says 57,739 children and young people were referred to CAMHS. There is also a gender imbalance in mental health. The 2106 Survey of Mental health and Wellbeing, England, shows that in 2014 common mental disorder problems were almost three times as commonly reported by young women aged 16-24 than young men<sup>94</sup>.

**Young undocumented refugees and migrants** whether in the UK illegally or born here, have significant problems. Even when they are entitled to apply for citizenship, the cost and bureaucracy can be off-putting. While being undocumented makes it difficult to assess number accurately, it is estimated that there are around 150,000 undocumented young people and three quarters of these are in London<sup>95</sup>. A report commissioned by the Paul Hamlyn Foundation, based on interviews with 75 young people in the North West, Midlands and London<sup>96</sup> found that: "Being undocumented has significant practical, social and economic impacts and permeates the everyday lives and decisions of young people. These impacts can have an effect on jobs and job search, social networks and friendships, housing and access to medical help and justice. Being undocumented often creates a transitory and insecure identity. Lack of status is an all-encompassing experience, producing distinctive forms of social marginality with significant impacts such as 'enforced' mobility in the search for accommodation, for work or to avoid detection"

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<sup>92</sup> Clarke A et al, Cambridge Centre for Housing and Planning, Estimating the Scale of Youth Homelessness in the UK: Final Report (July 2105)

<sup>93</sup> Public Health England, Health Inequalities in London (October 2015)

<sup>94</sup> <https://digital.nhs.uk/article/813/Survey-shows-one-in-three-adults-with-common-mental-disorders-report-using-treatment-services->

<sup>95</sup> Conversation with Will Somerville Unbound Philanthropy

<sup>96</sup> University of Oxford Refugee Studies Centre, 'No right to dream': the social and economic lives of young undocumented migrants in Britain (2014), Paul Hamlyn Foundation

## Employment

The proportion of the economically active population who are unemployed for 16-24 year olds was 13.5% in March – May 2016, down from 15.7% a year ago<sup>97</sup>, but still much higher than the adult population. The government has a strategy to increase apprenticeships to 3 million by 2020, to tackle some aspects of youth unemployment and increase the country's skill base. This will be partly funded by a levy on larger employers<sup>98</sup>. However, although lower than in other parts of the country, a worrying percentage of young people between the ages of 16-24 October – December 2016 were not in education employment or training (NEETS)<sup>99</sup>.

An [evaluation report](#), looking at City Bridge Trust funded projects across all London Boroughs to help young people NEET<sup>100</sup> concluded that for many young people NEET, with multiple needs, there was a need for intensive levels of support centred on the individual that was not usually available through official channels. Being unemployed also significantly affects emotional and mental wellbeing. The Princes Trust [Macquarie Youth Index 2015](#), which measures levels of happiness and confidence in young people says that 35% of young people NEET surveyed often feel too anxious to leave the house, 52% often feel anxious about everyday situations 46% avoid meeting new people, 39% find it hard to make eye contact and 33% regularly 'fall apart' emotionally increasing to more than a third (35 per cent) of NEETs.<sup>101</sup>. It is not however possible to know whether some of these difficulties and emotions were part of the reason for a young person becoming NEET, or the result of being NEET.

*Coming in from the Cold* a CBT funded publication, reports that **loneliness**, particularly for 18-24 year olds is a serious problem in London, and that both women and ethnic minorities were significantly over-represented among lonely young Londoners<sup>102</sup>. The NSPCC produces a [yearly report](#) which compiles and analyses the most robust and up-to-date **child protection data** that exists across the 4 nations in the UK for 2016.

## Older People

Although London has a younger demographic than other regions of the UK, there are over 980,000 people aged 65 or over and this is estimated to increase to 1.2m by 2024<sup>103</sup>. In particular the number of people aged 90 and over is set to increase from 56,000 in 2016 to 156,000 in 2041<sup>104</sup>. This will pose particular challenges for health and social care as well as for ensuring older people are not socially isolated. The

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<sup>97</sup> O'Neill M, Youth Unemployment Statistics, (July 20<sup>th</sup> 2016) Briefing Paper number 5871, House of Commons Library

<sup>98</sup> English Apprenticeships: Our vision 2020, HM Government 2016

<sup>99</sup> <http://researchbriefings.parliament.uk/ResearchBriefing/Summary/SN06705>

<sup>100</sup> Melville D et al Get Young People Working – the Youth Offer, Final Evaluation Report (November 2105) Centre for economic and social inclusion, City Bridge Trust

<sup>101</sup> Prince's Trust Macquarie Youth Index 2015, Prince's Trust

<sup>102</sup> *Coming in from the Cold*, Acevo 2016

<sup>103</sup> Making London a great place to grow older (2016) London AgeUk

<sup>104</sup> GLA 2016

health problems of old age, including multiple morbidity<sup>105</sup> affect deprived populations more, especially if they include mental health problems. Nationally, the number of black and minority ethnic (BAME) people over 70 is set to rise from 170,000 in 2006 to 1.9m in 2015<sup>106</sup>. [The Runnymede Trust](#) has a series of reports on older BAME people and financial inclusion.

Health and Social Care in the community published an article on the health, social care and housing needs of lesbian, gay, bisexual and transgender older people: a review of the literature in 2009 concludes that although the population of LGBT older people is growing at the same rate as that of older people in general, their needs have been largely disregarded by statutory services and institutions<sup>107</sup>. Stonewall Housing has a 2016 [feasibility study](#) on LGBT future housing.

A CBT funded report by IPPR summarises the findings from a year-long programme of research, setting out its findings in three policy areas: home-based care; dementia care and social isolation<sup>108</sup>. Social isolation and loneliness is a common problem among older people, affecting all communities<sup>109</sup> <sup>110</sup> and has also been demonstrated to have an adverse effect on mental and physical health.

## Conclusion

Given the constraints of time and space, this Review cannot cite all the wealth of information and research available on the needs of Londoners but it does provide a starting point for a more intense examination of particular topics and the interlinking between needs and issues. It is a working document that will be added to throughout the period of the Strategic Review. Constraints of space have meant that it has not been possible to include all the expert information and advice given by the people who generously gave their time to discuss the Review with the author. However this has been put in a separate internal CBT report that will inform staff and Trustees discussions during the Review.

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<sup>105</sup> Sachradja A, Dementia Care in London (March 2011) IPPR

<sup>106</sup> [www.runnymedetrust.org/uploads/pdfs/Runnymede%20briefing%208.pdf](http://www.runnymedetrust.org/uploads/pdfs/Runnymede%20briefing%208.pdf)

<sup>107</sup> Addis S, Davies M et al, Cardiff University, The health, social care and housing needs of lesbian, gay, bisexual and transgender older people: a review of the literature Health and Social Care in the Community (2009) 17(6), 647–658

<sup>108</sup> Clifton J editor, Older Londoners, (October 2012) IPPR

<sup>109</sup> Alone in the Crowd: Loneliness and diversity (May 2014) the Campaign to End Loneliness and The Calouste Gulbenkian Foundation UK

<sup>110</sup> Clifton J, Social Isolation among Older Londoners (October 2011) IPPR

## **Appendix A**

### **List of contacts**

Thanks are due to the following people who were interviewed for the Literature Review.

#### **The City Bridge Trust Staff Team** **City of London Corporation**

##### *Economic Development Unit*

Noa Burger	Head of Responsible Business
Sophie Hulm	Corporate Responsibility Manager
Dr Laura Davison	Head of Research
David Pack	Head of Enterprise

##### *Community and Children's Services*

Simon Cribbens	Policy Development Manager
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##### *Built environment*

Carolyn Dwyer	Director
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##### *Open Spaces*

Sue Ireland	Director
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##### *Town Clerk's Office*

Simon Latham	Head of Town Clerk's office
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##### *Heart of the City*

Vicky Mirfin	Interim CEO
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##### *Dept of Culture Heritage and Libraries*

David Pierson	Director
Nick Bodger	Head of Cultural and Visitor Development

##### *Lord Mayor's Charity Appeal Office*

Caroline Wright	Appeal Director
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##### *City of London Police*

Ian Dyson	Commissioner
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#### **NHS**

##### *Public Health England*

Aaron Mills	Head of London Regional Office
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#### **Independent Funders**

##### *London Funders*

David Warner	CEO
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##### *Trust for London*

Mubin Haq	Director of Policy and Grants
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*Cripplegate Foundation*  
Kristina Glen

CEO

*Big Lottery Fund*  
Sufina Ahmad

Policy and Learning Manager

*London Community Foundation*  
Victoria Warne

Deputy CEO

*East London Foundation*  
Tracey Walsh

CEO

*Legal Education Foundation*  
Matthew Smerdon

Director

*Baring Foundation*  
David Cutler

CEO

*Big Society Capital*  
Evita Zanuso

Financial Relationships Director

*Unbound Philanthropy*  
Will Somerville

CEO

**Other**

*MBARC*  
Michael Bell

Director

### **Appendix 3 - Grantee Perception Survey Summary**

The report prepared for CBT is a successor to a previous Grantee Perception study run by CEP in 2014. Headline findings from the 2016 study were shared at a meeting with the Chairman and Deputy Chairman in early December and include:

- When asked to describe the Trust in one word, grantees most frequently call it “supportive”
  - When asked which activities the Trust should engage in, grantees most strongly believed that the Trust should engage in encouraging more philanthropy in London
  - The Trust continues to have a strong impact on grantee organisations and grantees believe that the Trust understands them
  - Support - even a little - beyond the grant is highly valued by grantees but they feel the Trust could do more in this respect
  - 80% of respondent grantees receive CBT funds for project work rather than general operating/core costs – compared to 64% for the average funder. 13% receive core support from the Trust, relative to 21% of typical funders. When asked a custom question about how the Trust’s work could have a greater impact, grantees most frequently selected that the Trust could provide core support (over 75%) and longer grants (over 50%)
  - Grantees would like more contact with the Trust/Grants Officer after the grant was awarded
  - Grantees report spending 30 hours, on average, during the application and assessment process – higher than 70% of other funders in the CEP dataset
  - In open-ended comments, the top suggestion for how the Trust could improve relates to its processes, primarily the selection process. Grantees suggest clarifying expectations for Trust processes, streamlining requirements, and shortening the time between submission of application and final decision
  - Grantees rate the assessment visit by the Grants Officer (and monitoring visits) as most helpful, whereas they find the financial information required at the application stage least helpful.
1. A large data set accompanies the actual grantee perception report, and officers will be reviewing this to identify where recommendations can be addressed through the strategic review (as well as more immediately where they refer to changes we could make to information on the Trust’s website and application form). Members will have the opportunity to engage with the detail of the work done by the CEP at the February 2017 City Bridge Trust Committee meeting.





THE CENTER  
FOR EFFECTIVE  
PHILANTHROPY

# Grantee Perception Report

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Prepared for the  
**City Bridge Trust**  
December 2016

THE CENTER FOR EFFECTIVE PHILANTHROPY

## CEP MISSION

The mission of the Center for Effective Philanthropy is to **provide data and create insight** so philanthropic funders can better define, assess, and improve their effectiveness – and, as a result, their intended impact.

## Agenda

- › Overview & Methodology
- › Summary of Key Findings
- › Recommendations from CEP
- › Q&A and Discussion



THE CENTER FOR EFFECTIVE PHILANTHROPY

## Grantee Survey Population

Survey Fielded	Number of Responses Received	Survey Response Rate
September and October 2016	227	70%
February and March 2014	413	70%

## Comparative Data

- ~300 funders (22 based outside the United States , including 11 in the UK)
- ~50,000 grantees

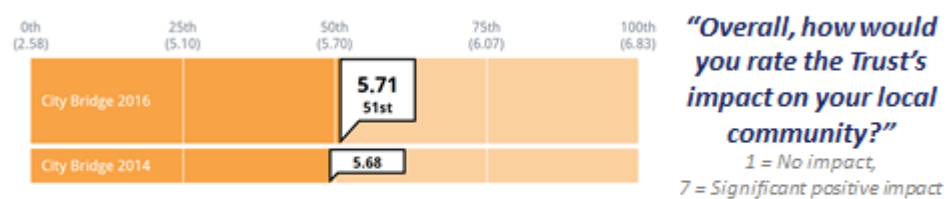
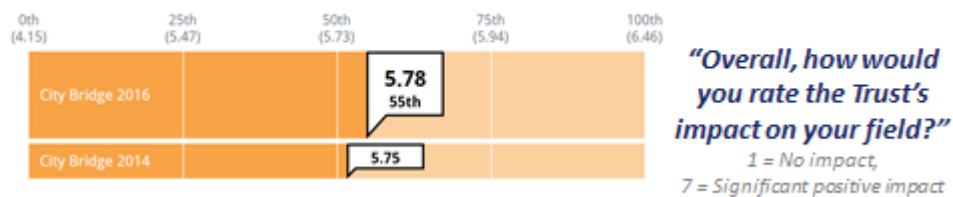


# Field and Community Impact

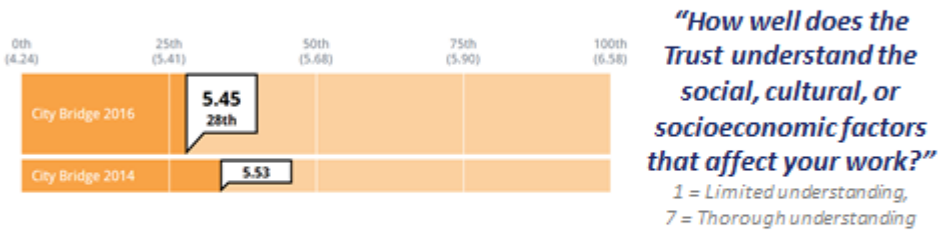


THE CENTER FOR EFFECTIVE PHILANTHROPY

## Field and Community Impact



## Understanding of Grantees' Context



***“The Trust is well-known by a wide range of sector organisations.... The Trust is recognised as having a very sound grasp of the needs of the London communities it serves.”***

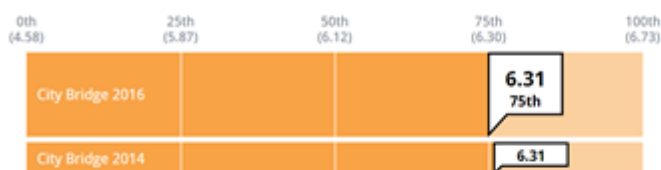
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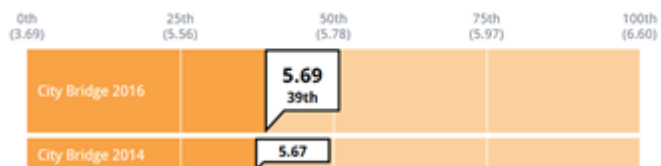
## Organisational Impact

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## Organisational Impact and Understanding



***“Overall, how would you rate the Trust’s impact on your organisation?”***  
 1 = No impact,  
 7 = Significant positive impact

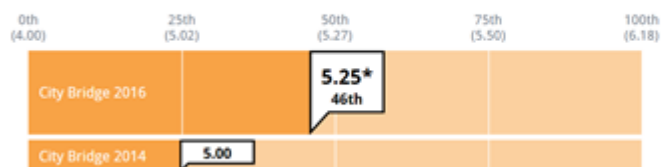


***“How well does the Trust understand your organisation’s strategy and goals?”***  
 1 = Limited understanding,  
 7 = Thorough understanding

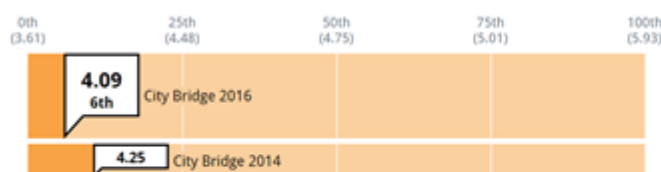
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## Awareness of Grantee Challenges



***“How aware is the Trust of the challenges that your organisation is facing?”***  
 1 = Not at all aware,  
 7 = Extremely aware



***“To what extent does the Trust take advantage of its various resources to help your organisation address its challenges?”***  
 1 = Not at all,  
 7 = To a very great extent

CEP

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## Grantmaking Characteristics

	City Bridge 2016	Typical Funder
Median Grant Size	£96K	£51K
Grant Size Relative to Grantee Budget	7%	4%
General Operating/Core Support	13%	21%
Grantees Receiving Consistent Funding from the Trust	26%	52%

These grantees rate City Bridge Trust **more positively on nearly every GPR measure**

CEP

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***“The Trust is keen to strengthen its ability to support disadvantaged Londoners....How do you think the Trust’s work could have a greater impact?”***

*Note: grantees could select up to three options.*

# 76%

The Trust should provide core support

# 55%

The Trust should provide longer grants

# “

*“The Trust does seem to put an emphasis on project funding and innovation with less regard to sustaining ongoing services that are able to demonstrate need and effectiveness...”*

CEP

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# Funder-Grantee Relationships



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## Funder-Grantee Relationships

### STRONG RELATIONSHIPS

#### INTERACTIONS

- Fairness of treatment by foundation
- Comfort approaching foundation if a problem arises
- Responsiveness of foundation staff

- Clarity of communication of foundation's goals and strategy
- Consistency of information provided by different communications

#### COMMUNICATIONS



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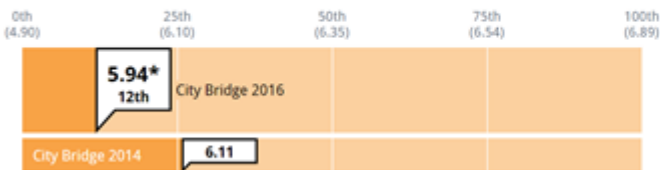




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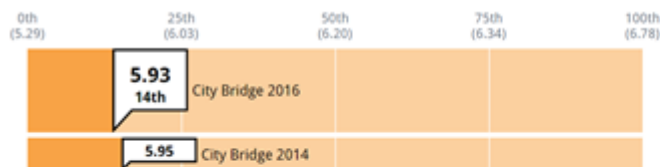
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## Interactions with the Trust



**“Overall, how responsive was the Trust staff?”**

1 = Not at all responsive,  
7 = Extremely responsive



**“How comfortable do you feel approaching the Trust if a problem arises?”**

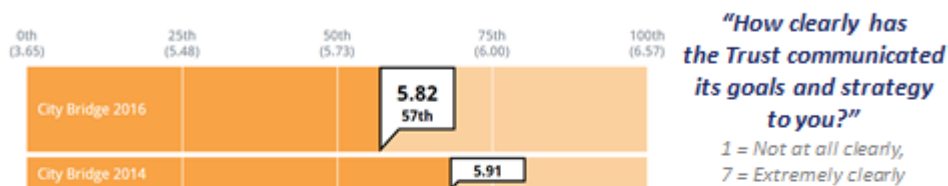
1 = Not at all comfortable,  
7 = Extremely comfortable

Grantees experiencing the Trust as highly responsive rate significantly higher on nearly every survey measure

CEP

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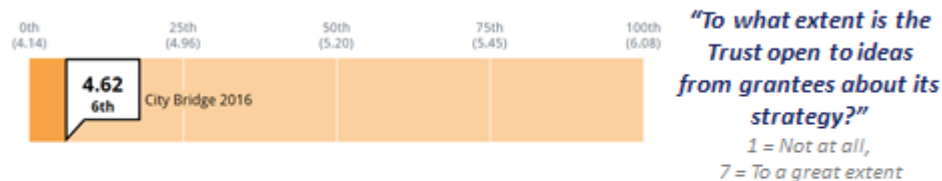
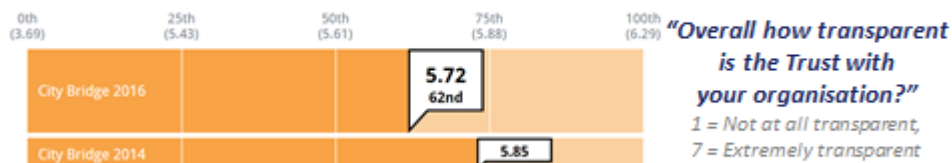
## Communications with the Trust



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## Transparency and Openness to Grantee Ideas



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*"The Trust is very **realistic about work** and is **flexible when unforeseen circumstances occur** - they are willing to negotiate changes and are **very helpful and understanding.**"*

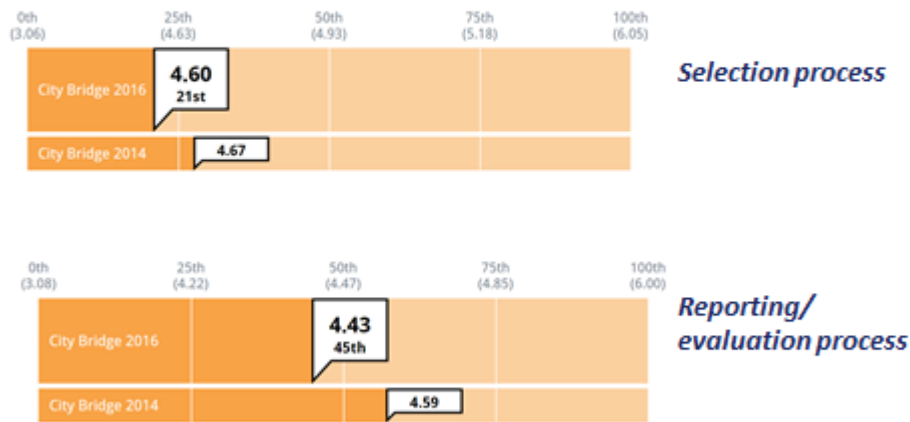


*"My meeting with our Grants Officer was **very helpful during the application process**... However, since [then] we have not had any communications... In one sense that is good because... we are trusted to get on with doing the work; however, some contact with an Officer would be useful to **build up a positive on-going relationship** with the Trust. **I do not know who our on-going officer actually is.***

## Grantmaking Processes

***“How helpful was participating in the Foundation’s processes in strengthening the organisation/programme funded by the grant?”***

*1 = Not at all helpful, 7 = Extremely helpful*



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## Selection Process

Time Spent on Selection Process	Trust 2016	Trust 2014	Typical Funder
Hours spent on application and selection process	30 hours	30 hours	20 hours
Application Turn-Around Time	Trust 2016	Trust 2014	Typical Funder
Grantees waiting 7+ months for funding commitment	21%	11%	9%



*“The application was certainly **lengthy and involved** and took us a long time to complete - in particular the financial requirements were complicated...”*

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## Reporting/Evaluation Process

**45%**

of grantees discuss their reports/evaluations with the Trust

**60%**

of grantees exchange ideas with the Trust about how they will assess the results of the grant-funded work



These grantees rate City Bridge Trust **more positively on many GPR measures**

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## Recommendations from CEP

- › Build and demonstrate the Trust's **understanding of contextual factors** that affect grantees' work
- › To maintain strong impact on grantee organisations, consider **modifying grantmaking practices, providing supports beyond the grant check,** and/or utilizing Trust resources to **help grantees address their challenges**
- › Ensure **clear and concrete expectations** for interactions between staff and grantees, while seeking to be increasingly responsive
- › Ensure **consistent communications** with grantees and be more **open to ideas from grantees** about the Trust's strategy
- › Identify ways to make the **application/selection process less burdensome**, including providing clear guidance about expectations and timelines, and exploring opportunities to streamline
- › Consider **expanded engagement** with grantees **during the reporting process**

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## Appendix 4 – Named Stakeholders Engaged in Strategic Review as at Jan 2017

<b>City Bridge Trust Staff Team</b>	
<b>Name</b>	<b>Role</b>
David Farnsworth	Director
Jenny Field	Deputy Director
Tim Wilson	Principal Grants Officer
Ciaran Rafferty	Principal Grants Officer
Anita Williams	Finance Officer
Scott Nixon	Head of Projects
Cheryl Belmont	Executive Assistant
Rebecca Green	Grants Assistant
Simrat Kaur Gupta	Monitoring Evaluation Assistant
Martin Hall	Communications Officer
Sandra Davidson	Grants Officer
Jemma Grieve Coombe	Grants Officer
Sandra Jones	Grants Officer
Jack Joslin	Grants Officer and Senior Grants Officer
Joan Milbank	Grants Officer
Julia Mirkin	Grants Officer
Shegufta Rahman	Grants Officer
Neha Chandgothia	On Purpose Associate
Kyro Brooks	On Purpose Associate
Rob Bell	Independent Consultant
Olivia Dix	Independent Consultant
Eva Varga	Independent Consultant
Annette Zera	Independent Consultant

<b>City of London Corporation Colleagues</b>	
<b>Name</b>	<b>Department</b>
Karen Atkinson	Chamberlains
Stephanie Basten	Media Team
Nick Bodger	Department of Culture, Heritage and Libraries
Noa Burger	Economic Development Office
Simon Cribbens	Community and Children's Services
Eugenie De Naurois	Economic Development Office
Laura Davison	Economic Development Office
Kristina Drake	Media Team
Carolyn Dwyer	Department for Built Environment
Ian Dyson	City of London Police
Sheldon Hind	Internal Communications
Sophie Hulm	Economic Development Office
Sue Ireland	Open Spaces
Simon Latham	Town Clerk's Office
Emma Lloyd	Town Clerk's Office
Lorraine McLennan	Internal Communications
David Pack	Economic Development Office



Monica Patel	Community and Children's Services
David Pierson	Department of Culture, Heritage and Libraries
Philippa Sewell	Town Clerk's Office
Liz Skelcher	Economic Development Office
Kate Smith	Town Clerk's Office
Graham Sutton	Economic Development Office
Caroline Wright	Lord Mayor's Charity Appeal Office

**The following Members of the City Bridge Trust Committee have been engaged:**

Alderman Alison Gowman (Chairperson)
Ian Seaton (Deputy Chairperson)
Karina Dostalova
Stuart Fraser
Marianne Fredericks
Alderman Vincent Keaveny
Vivienne Littlechild
Jeremy Mayhew

**Individuals engaged through one-to-one or small group meetings**

<b>Name</b>	<b>Organisation</b>
Donnachadh McCarthy	3 Acorns Eco-Audits
David Cutler	Baring Foundation
Bel Crewe	BBC Children in Need
Jessica Middleton	BBC Children in Need
Craig Tomlinson	BBC Children in Need
Nicolette Wolf	BeMore
Philippa Bonella	Big Lottery Fund
Gemma Bull	Big Lottery Fund
Dan Paskins	Big Lottery Fund
Evita Zanuso	Big Society Capital
Marion Brossard	Collaborate CIC
Annabel Davidson Knight	Collaborate CIC
Henry Kippin	Collaborate CIC
Stephanie Taylor	Charities Aid Foundation
Kate Spiliopoulos	Centre for London
Kate Aldous	Clinks
Nissa Ramsay	Comic Relief
Tracey Walsh	East End Community Foundation
John Mulligan	Esmee Fairbairn Foundation
Vicky Mirfin	Heart of the City
Tracey Lazard	Inclusion London
Steve Wyler	Independent Consultant (The Way Ahead)
Alvin Carpio	Joseph Rowntree Foundation
Julian Corner	Lankelly Chase Foundation
Jess Middleton	Lankelly Chase Foundation

Victoria Warne	London Community Foundation
Geraldine Blake	London Funders
Adewale Fashade	London Voluntary Service Council
Holly Middleditch	London Youth
Emma Kosmin	Living Wage Foundation/Citizens UK
Michael Bell	MBARC
Sharon Long	Partnership for Young London
Bridget McGing	Pears Foundation
Aaron Mills	Public Health England
John Griffiths	Rocket Science
Natsayi Sithole	Save the Children
Cara Whelan	Save the Children
Toby Bennett	Space Hive
Chris Gourlay	Space Hive
Mary Rose Gunn	The Bulldog Trust
Katharine Round	The Divide Film
Christopher Hird	The Divide Film
Matthew Smerdon	The Legal Education Foundation
Natalie Byrom	The Legal Education Foundation
Graham Fisher	Toynbee Hall
Rosie Spiegelhalter	Toynbee Hall
Mubin Haq	Trust for London
Bharat Mehta	Trust for London
Will Somerville	Unbound Philanthropy
Stewart Goshawk	Wembley National Stadium Trust

<b>Attendees at Meeting on 07.11.16 aimed at Civil Society Organisations and Grantees</b>	
<b>Name</b>	<b>Organisation</b>
Barbara Van Heel	Action Space
Wesley Harcourt	AdviceUK
Kawika Solidum	BeyondMe
Neil Debnam	Camden Arts Centre
Jill Harrison	Enfield CAB
Katrina Baker	Groundwork London
Terry Stokes	Lasa
Lisa Redding	London Voluntary Service Council
Phil Kerry	London Youth
Fiona Baird	Newham New Deal Partnership
Johnnie Hoogewerf	NSPCC
Jo Hickman	Public Law Project
Andy Gregg	Race on the Agenda
Marisa Brown	Spectra
Jude Habib	Sounddelivery
Krystyna Szafranski	St Mungo's
Kate White	Superhighways (Kingston Voluntary Action)
Michael Buraimoh	The Upper Room

**Attendees at Meeting on 08.11.16 aimed at Stakeholders Working On Grantmaking**

<b>Name</b>	<b>Organisation</b>
Andrea Kelmanson	Andrea A Kelmanson Consulting
Robert Dufton	Cass Business School
Annabel Davidson Knight	Collaborate
Hazel Durrant	Create London
Steven Francis	London Borough of Islington
Matthew Patten	Mayor's Fund for London
Rob Abercrombie	NPC
Colin Peak	NSPCC
Felicity Chadwick Histed	Publitas Consulting
Louisa Ware	The London Leadership Strategy
Hannah Gibbs	Tomorrow's People
Jacqui Cocker	Tower Hamlets CVS
Philip Nichols	Westway Trust

**Attendees at Meeting on 15.11.16 aimed at Trusts, Foundations and Funders**

<b>Name</b>	<b>Organisation</b>
Sacha Rose-Smith	Big Lottery Fund
Clara Wilson	Big Lottery Fund
Nissa Ramsay	Comic Relief
Chris Llewellyn	CriSeren Foundation
John Gahan	Girdlers' Company Charitable Trust
Tania Slowe	J Leon Philanthropy Council
Erik Mesel	John Lyon's Charity
Chris Anderson	Lloyds Bank Foundation for England and Wales
David Warner	London Funders
Bob Nightingale	London Legal Support Trust
Yemisi Blake	Paul Hamlyn Foundation
Faiza Khan	Paul Hamlyn Foundation
Helen Kersley	The Cripplegate Foundation
Daniel Chapman	Walcot Foundation

**Attendees at Meeting on 18.11.16 aimed at Philanthropy Stakeholders**

<b>Name</b>	<b>Organisation</b>
Joel Cohen	BeyondMe
Elizabeth Dulley	Centre for London
Imogen Hamilton-Jones	Centre for London
Cheryl Chapman	City Philanthropy
Ian Parkes	ELBA
Caroline Fiennes	Giving Evidence
Natalie Chevin	Haven House Children's Hospice
Clare Thomas	London's Giving Consultant
Paul Morrish	LandAid Charitable Trust
Julian Andrew Curtis	Oxfam
Kathryn William	Oxfam

Pam Waring	P W Consulting
John Pepin	Philanthropy ImPact
Roger Gorman	ProFinda.com
Laurence Guinness	The Childhood Trust
Celine Gagnon	The Funding Network
Edward Gardiner	The Good Exchange

<b>Attendees at Meeting on 21.11.16 aimed at Social Investors</b>	
<b>Name</b>	<b>Organisation</b>
Mark O'Kelly	Barrow Cadbury Trust
Rohan Martyres	CAN Investment
Kyro Brooks	City Bridge Trust
Tim Wilson	City Bridge Trust
Jules Tompkins	Esmee Fairbairn Foundation
Danyal Sattar	Joseph Rowntree Foundation
Douglas Gunn	Trust for London

<b>Attendees at Meeting on 21.11.16 aimed at Social Investment Stakeholders</b>	
<b>Name</b>	<b>Organisation</b>
Phil Messere	Big Lottery Fund
Evita Zanuso	Big Society Capital
Karen Atkinson	City Bridge Trust
Kyro Brooks	City Bridge Trust
Tim Wilson	City Bridge Trust
Kate Limna	City of London Corporation
Ashley Horsey	Commonweal
Susan Ralphs	Ethical Property Foundation
David Hutchison	Social Finance

<b>Centre for Accelerating Social Technology (CAST) Meeting With CBT Grantees, 2.12.16</b>	
<b>Name</b>	<b>Organisation</b>
Dan Sutch	CAST
Ellie Hale	CAST
Kieron Kirkland	CAST
Kumar Hindocha	Harrow Carers
Fran Mensah	Harrow Carers
Catherine O'Keeffe	Redbridge Carers
Tina Patel	Redbridge Carers
Susan Underhill	Age UK Lewisham and Southwark
Rajvi Patel	Age UK Lewisham and Southwark
Francis Ngale	Carers Network Westminster
Irene Winter	Hornsey Lane Estate Community Association
Chioma Onugha	Hornsey Lane Estate Community Association
Fergus Early	Green Candle Dance Company
Eddie Chan	Chinese National Healthy Living Centre

**Centre for Accelerating Social Technology (CAST) Meeting With CBT Grantees, 2.12.16**

<b>Name</b>	<b>Organisation</b>
Joy-Caron Canter	Royal Docks Learning and Activity Centre
Thishan Rajendram	Royal Docks Learning and Activity Centre
Gill Wilson	Age UK Richmond upon Thames
Gavin Shand	Age UK Richmond upon Thames
Kerry Andrews	ArtsDepot

**Attendees at Meeting on 29.11.16 aimed at Londoners**

<b>Name</b>	<b>Organisation</b>
Rob Parton	Barbican Centre Trust
Eric Samuel	Community Food Enterprise Limited
Osman Yavas	FareShare
Beth Barber	Independent
Jane Caldwell	Independent
Abi Knipe	Independent
Natalia Perez	Independent
Charles Taylor	Independent
Juliet Valdingner	Independent
Veryan Wilkie-Jones	Made In Hackney
Jessica Devnani	Prisoners Abroad
Renae Mann	Refugee Action
Katy Savage	Revolving Doors Agency
Asma Hussain	Royal Opera House
Nicola Cullen	Share Action
Angie Foran	Streatham Youth and Community Trust
Rosa Morgan-Baker	The Brokerage, City Link

**Partnership for Young London Network Meeting, 2.12.16**

<b>Name</b>	<b>Organisation</b>
Barry Williams	Ambition
Deborah Meyer	Big Lottery Fund
Jo Hobbs	British Youth Council
Catherine Fayers	Cabinet Office
Nina Thorpe	Cabinet Office
Melissa Hayes	City of London Corporation
Monica Patel	City of London Corporation
Kim Watson	City of London Corporation (Prospects)
Robert Dominic	Greater London Authority
Joyce Harvie	Greater London Authority
Daisy Ryan	Henry Smith Charitable Foundation
Safia Noor	Hyde Housing
Jonny Boux	Inspire! Education Business Partnership
Nathan Singleton	Lifelines

<b>Partnership for Young London Network Meeting, 2.12.16</b>	
<b>Name</b>	<b>Organisation</b>
Chris Murray	London Borough of Hackney
Matt Barber	London Borough of Enfield
Dominique Edwards	London Borough of Enfield
Graham Jimpson	London Borough of Enfield
Amani Simpson	London Borough of Enfield
Justine Wilson-Drake	London Borough of Islington
Paul Davies	London Borough of Lambeth
Jude Simmons	London Borough of Merton
Nadia McMahon	London Borough of Newham
Phil Kerry	London Youth
Jonathan Slater	London Voluntary Service Council
Sam Ellis	Oasis Hadley
Louise Tang	Royal Association for Deaf People (RAD)
Sam Mars	Skyway
Nick Wallbridge	Stonewall Housing
Bryan Lovell	St. Stephen Walbrook
Leigh Jenkins	vInspired
Robert Dyer	Young Lambeth Cooperative

<b>London Youth Network Meeting, 06.12.16</b>	
<b>Name</b>	<b>Organisation</b>
John Macneely	Action on Disability
Tim Saunders	Alford House
Tamora Burford	Cedars Youth and Community Centre (Watford Community Sports and Education Trust)
Danusia Brzezicka	Community Focus
Letty Porter	Ebony Horse Club
Liam Clipsham	Fitzrovia Youth in Action
Nicola Butler	Hackney Play
Kim Peltier	Leap Confronting Conflict
Clifford Fleming	London Youth
Holly Middleditch	London Youth
Stella Howe	New Horizons Youth Centre
Kamrul Islam	Osmani Trust
Ginna	Springfield Community Flat
Sabir Bham	Salaam Peace
John Wilson	The Sulgrave Trust
Matt Band	Young Brent Foundation
Dan Burke	Young Harrow Foundation

<b>Attendees at Meeting on 07.12.16 aimed at Civil Society Organisations and Grantees</b>	
<b>Name</b>	<b>Organisation</b>
Erika Jenkins	Barking and Dagenham CVS
Tracey Phillipson	Charity IT Association

### **Attendees at Meeting on 07.12.16 aimed at Civil Society Organisations and Grantees**

<b>Name</b>	<b>Organisation</b>
Julia Mirkin	City Bridge Trust
Maxine Willets	Epic CIC
Charlotte Curran	Irish In Britain
Lucy Benson	Islington Play Association
Emma Finch	Liberty
Monty Moncrieff	London Friend
Susan Murray	Pan Intercultural Arts
Dorcas Morgan	Park Theatre
Grace Barbour	Rethink Mental Illness
Nicola Steuer	School for Social Entrepreneurs
Alban Stowe	The Prince's Trust
Penne Wallis	Wigmore Hall Trust
Jocelyn Hillman	Working Chance

### **Attendees at Meeting on 08.12.16 aimed at Local Government Stakeholders**

<b>Name</b>	<b>Organisation</b>
Monica Needs	London Borough of Barking and Dagenham
Mavis Kusitor	London Borough of Hackney
Jessica Finnin	London Borough of Havering
Aine Hayes	London Borough of Hounslow
John Muir	London Borough of Islington
Grace Gbadamosi	London Borough of Lambeth
Winston Castello	London Borough of Lewisham
Andrew Matheson	London Borough of Southwark

### **Attendees at Meeting on 09.12.16 aimed at Stakeholders Tackling London's Inequalities**

<b>Name</b>	<b>Organisation</b>
Kat Hanna	Centre for London
Katherine Abbie	Greenhouse Sports
Pat Fitzsimmons	Thames Estuary Partnership
Stephen Bediako	TSIP
Farah Elahi	Runnymede Trust
Kunle Olulode	Voice4Change England

### **People met in January 2017, not already listed**

<b>Name</b>	<b>Organisation</b>
Liz Ellis	Heritage Lottery Foundation
Harriet Gugenheim	Impetus PEF
Elisabeth Paulson	Impetus PEF
Duncan Shrubsole	Lloyds Bank Foundation
Paul Streets	Lloyds Bank Foundation
Simon Parker	London Borough of Redbridge
Adam Lent	New Local Government Network



Eliza Buckley	Institute for Voluntary Action Research (IVAR)
Ben Cairns	IVAR
Richard Harries	Power to Change
Caroline Diehl	The Media Trust
Sioned Churchill	Trust for London

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# City Bridge Trust

DRAFT Funding Strategy, 2018-2023  
*Bridging divides*

*January 2017*



## Introduction

In the last 21 years, the City of London Corporation's charitable funder, City Bridge Trust (CBT) has made grants of over £330 million to over 7000 organisations who are working with the most disadvantaged people in every London Borough. CBT is London's largest independent funder, distributing approximately £20m each year.

We currently fund a broad range of work focused on tackling disadvantage in London, from improving Londoners' mental health, to services that strengthen London's voluntary sector.

Every five years, CBT conducts a review and assessment of the work that we do in fulfilling our current vision of a fairer London. This process helps to ensure that we remain relevant and alive to the changing needs of Londoners, informing the funding strategy for the next five years and a grants budget totalling £100 million. We are hopeful that our review process will give us the time to think deeply about our role in ensuring that London is a city where everyone can thrive.

In September 2016, the formal work for planning CBT's 2018 to 2023 funding strategy began. This document outlines a proposed **draft** strategy for CBT, which considers the use of CBT's assets to deal with the disadvantage faced by marginalised Londoners, in order to make this a city where everyone can thrive, and rises to the challenges and opportunities that exist within London.

This draft will evolve over time through feedback and support from our committee, our staff, staff at the City of London Corporation (CoLC) and a wide range of external stakeholders from multiple sectors. The feedback on this particular draft will be gathered in multiple ways in February and March 2017 mainly - full details can be found on our website: <https://www.citybridgetrust.org.uk/strategic-review/>

We expect that the feedback will be robust; and demanding of changes to this draft - some of which will be implemented in full or partly. This draft strategy shows some significant differences and similarities to CBT's current funding strategy - Investing in Londoners - and provides a clear direction of how we intend to continue addressing complex and seemingly intractable societal problems through our funding and networks.

Sufina Ahmad,  
Head of Strategic Review, City Bridge Trust

January 2017

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## Context

Every year millions of people come to London; some visit as tourists, some come here to work, but not live, others for their education, and then there are those who arrive to make their home. It is a city constantly in flux, where new communities live alongside those Londoners who are already benefitting from the many accolades that the city has to offer, in terms of its: culture, heritage, diversity, resilience and wealth.

However, not all Londoners experience all it has to offer positively. In 2016 City Bridge Trust was part of a partnership of funders who funded the London Fairness Commission, which asked the question ‘Is London Fair?’ The commission agreed that London was an ‘*extraordinary city*’. However it bore a warning too about the divides emerging in terms of the cost of living and the wealth gaps between the richest and poorest in the city. The Commission published its finding in March 2016, with a clear statement that if we do not act now to address these inequalities, then we risk London becoming a:

*‘...a playground for the super-rich, a treadmill for the middle-classes and a workhouse for the poor.’*

(Lord Victor Adebawale, Chair of the London Fairness Commission)

Not long after this, 2016 became a year of unprecedented political changes in the UK, with the outcome of the Brexit vote, also resulting in a new Prime Minister. These potentially seismic shifts come on the back of financial crises, recessions, global economic slowdown, loss of faith in some institutions, significant reductions in public spending, and for civil society intense scrutiny as to their role and effectiveness in creating a fair and good society.

Regardless of your politics, most agree that this is a time of uncertainty and that there is a need for bold and creative thinking. It is a time for all parts of society to come together and respond.

CBT is unique in the support and input that it can provide, simply because we have strong links to civil society and the constituencies they represent through our funding, as well as having strong links to local, national and regional Government and the business sector through our trustee, the City of London Corporation. These links are particularly significant in times when the topic of the winners and losers from globalisation are being hotly considered by so many in the UK and globally.

This draft strategy sets out CBT’s ambitions to work with a wide range of partners from across society to use all of its assets, including the £100 million it will have available over this five year period, to bridge the divides that are so well-evidenced in our city, and make this a city where everyone can thrive. CBT is not alone in wanting to succeed in this - it has dominated many of our discussions with external stakeholders, as well as being the subject of consultations we have been invited to participate in, including the Mayor of London, Sadiq Khan’s consultation in late 2016 exploring his Office’s role in making London *a city for all Londoners*.

## Who has been involved in developing this draft strategy

CBT has built the evidence base for its next strategy through working collaboratively and meaningfully with Londoners and key stakeholders from all sectors linked to its work. Stakeholders have been engaged through face-to-face group and one-to-one meetings; attending and contributing to various conferences, workshops and meetings; commissioning an independent grantee perception survey through the Center for Effective Philanthropy (227 anonymous responses received); launching an online survey open to all (62 responses received); and through our social media hashtag #BridgingLondon. This is a conversation that will continue until the next strategy is agreed, and beyond.

Therefore, since August 2016 CBT have engaged with over 500 people to help inform its thinking. A list of the 300 people who have contributed to the review, along with a brief summary of how they have been engaged can be found on our [website](#).

The details of the Strategic Review were also promoted at the following events, but no lists exist of the exact people in attendance:

1. **London Conference, 16.11.16** - A large number of people engaged with us directly at our exhibitor stand, and through the social media hashtag for the event #LonConf2016. The conference was attended by mostly private sector organisations, as well as a good range of civil society and public sector colleagues.
2. **Greater London Volunteering Conference, 18.11.16** - CBT co-hosted a workshop with London Funders on funding and CBT's Strategic Review, and 50 people mainly from civil society organisations came along.

This work has been further underpinned by research commissioned to analyse need in London through the prism of disadvantage; funding best practice; and to determine CBT's role in London's funding ecology. To-date, a Literature Review of the research analysing need through the prism of disadvantage has been completed in full, and it was published on the CBT website in October 2016.

The research commissioned for completion by Rob Bell, (to review best practice within the funding sector) will be available by mid-February 2017, and will inform the processes and approaches we apply to distributing our funding in the future. The same timeframe applies to CBT's decision to commission Collaborate CIC to complete a market scoping review of CBT. This will form the basis from which CBT begins to devise options as to how the work of funders and investors in London's civil society can be mapped to create a navigable overview of the London funding ecology.

CBT is immensely grateful to everyone who has so generously given up their time to share their expertise with us. A diverse range of views has been expressed to-date, and this draft strategy is our first attempt to gather the themes and ideas that were expressed in such a way that enables CBT to add real value.



## Summary of CBT's next funding strategy

The intention to date has been to conduct a Strategic Review that is robust, of its time, and effectively takes in to consideration and reflects the diversity of views expressed by internal and external stakeholders, which have been gathered in multiple ways.

Funders like CBT are seeking to tackle some of the toughest social issues facing some of the most marginalised and disadvantaged groups in 21<sup>st</sup> century society, at a time when resources are diminishing, and demand is increasing. This draft strategy considers how we operate in a way that is flexible and ambitious, which shows thought leadership, influences others and has the potential to succeed in fulfilling our vision.

A visual representation of the strategy is included on page 12 of this document. The key points to highlight are:

1. A strategy like this requires real thought in to how to best articulate its priorities, and implement the overall vision that has been set out. This will be our focus in the coming months, alongside the thinking we have done already.
2. This strategy enables CBT to take a vision and values led approach to its funding decisions. This means that we are looking to partner with organisations who share our vision and values. CBT has funded incredible organisations over the years, and we want to work more equally with organisations we support in order to find the solutions to the divides that we hope to bridge.
3. The strategy that we set out for 2018 will have changed by 2023. There is so much uncertainty ahead of us, in terms of: Brexit, a general election, a mayoral election and the overwhelming feedback from stakeholders that there are communities and civil society organisations that are in crisis. It is important therefore to have a strategy that is committed to adapting and learning, which looks at where it is making progress and where it needs to change, in response to these uncertainties.
4. This strategy provides our partners with a toolbox of different funding approaches, and a funder 'plus' programme which helps our partners to thrive too. Our approaches will be diverse, using both our monetary and non-monetary assets in a way that is fair, representative and proportionate.
5. At the moment we are considering our funding priorities through the following headers:
  - Place based funding
  - Addressing inequalities
  - Transitions
  - Fairness and voice

This may mean that the ideas we support in our next strategy are broader and less defined than we are currently used to. It will encourage us to be more relational and flexible in our approaches, resulting in us developing specific areas of impact over time.

## CBT's next funding strategy

This strategy contains a revised vision for our work, which expresses the belief that London should be a city where disadvantaged and marginalised individuals and communities are supported to not just survive, but to thrive too. The mission will be to use all of our knowledge, networks and assets to champion London's biggest asset - its people. We believe that it is only by *bridging divides* that London can become a city that truly works for everyone.

CBT has a clear mandate to serve Londoners and the communities they connect to, as the CoLC's charitable funder, and we do this predominantly through funding civil society, as well as having clear links to local, regional and national Government, the private sector and the wider funding ecology.

The draft strategy has been condensed in to a one page visual representation on page 12 of this document. Ultimately, the main things to note are that the themes and approaches through which we distribute our funding will be broader. However, we still intend to remain ambitious and focussed on the impact we can make as a funder.

CBT has shown that it can pick amazing organisations to fund; and can fund in ways that are considered creative and effective. This draft strategy provides us with a strategy that plays to these strengths, through placing values and vision at the heart of the decision making process rather than arbitrary themes and outcomes; and through expanding the ways in which we can support organisations through our monetary and non-monetary assets.

The draft strategy ensures that we lead by example and are accountable through our strategy - both by staying true to fulfilling our vision, and by remaining responsive to what is likely to continue to be fast-paced change within communities.

It is a draft strategy that listens to the feedback provided, urging us to be flexible in its approaches and not to assume expertise on social issues, and instead empower communities, Londoners and organisations on the ground to tell us what they need in order to thrive. The various 'parts' of the strategy can be summarised as follows:

- **CBT's vision and mission**

CBT's revised vision set out above will provide us with real clarity of purpose, and will form the basis of all of our funding and non-funding decisions. Having a vision-led approach means that we will reduce our focus on having many different and specific funding streams through which we fund organisations. This allows us to remain alive to the fast pace at which the needs of disadvantaged and marginalised Londoners is changing, and it recognises the fact that communities and the people within them exist within multi-faceted systems.

- **CBT's values**

CBT is seeking to partner with organisations that share our values, which are currently articulated as independence, inclusion and integrity.

Going forwards we have defined our over-arching value base as follows:

1. Inclusion and representation
  - We believe that we should work in such a way that is both of and for our community. We will work hard to ensure that as an organisation we represent and reflect the diversity of London's communities in all aspects of our work.
2. Care for the environment
  - As global resources dwindle, and the pollution levels in London increase at an alarming pace, we will prioritise reducing our carbon footprint through our work, and encourage the care and understanding of the environment.
3. Early action
  - Whilst we know that we will always fund services at the acute end of the need, we will be a strong advocate for creating a society that acts earlier. We believe that in order to achieve this, we need to work with partners that have a strong commitment to learning, and have expertise and a successful track-record in the work that they do.
4. Working in ways that support Londoners, communities and sectors to come together
  - Fulfilling our vision relies on us working together with partners from across London and beyond in order to support the development of new and existing approaches. Successfully supporting people and communities that are marginalised and disadvantaged insists on people coming together, learning from each other and then effecting lasting change.
5. Being adaptive and creative, with a clear sense of purpose
  - We will commit to learning from our own work and that of others, in order to demonstrate and improve the impact that we are achieving through our work. We know that a creative approach by us as a funder will provide the people we support with more opportunities to thrive.

Our vision and mission will be the rationale behind why we do the work that we do, and if we feel we have strayed unnecessarily from this purpose then we will work together to return to this.

At CBT, we have been privileged to work with some amazing organisations that have affected massive positive changes for Londoners. We believe that great organisations do great work, and this is what we want to fund.

In order to make funding decisions, we will ask those applying for our funding how they live these values in their day-to-day work. We think that this approach will make us less transactional as a funder, and result in us working with the people who gain our funding or non-monetary support as our partners.

When this strategy is implemented we will detail in full what the values above mean to us. We don't expect that every one of our partners will express these values in the exact same way as us, and we know that sometimes the intentions

are there but it is hard to live your values if resources are scarce. Therefore, we will take that in to consideration in our assessments.

- **What CBT will fund**

CBT will be a proactive funder, meaning that we still intend to have clearly defined interests and priorities that we support, which we will promote in many different ways in order to ensure that London benefits from our funding. We want to work together with communities to find the best ideas, projects and organisations to support.

1. Place based funding

We want to help communities of place and interest throughout London to fund activities that are important to them; that help them to (re)build community assets; and in some cases even back projects that could result in positively and dramatically changing the prospects of a community long-term.

This funding could help to support great community engagement work, and champion those communities of active and engaged Londoners that work hard to ensure that all Londoners benefit from this great city.

We also know that there are many hidden and forgotten communities in London, and we are interested in funding and supporting them to become more empowered, so that they can be in charge of creating the differences they want to see and are given the tools to unlock their potential and creativity.

2. Addressing inequalities

The socio-economic and health inequalities experienced in London are well-known to many of the organisations we work with. London is a city where the richest and poorest can live side-by-side, without ever truly crossing paths. These inequalities are then exacerbated further for disadvantaged and marginalised communities in other parts of their lives, such as the well-documented examples of disabled people being less likely to gain employment or people from black and minority ethnic communities being more likely to have mental health issues, and not have access to the right services and support.

We are interested in exploring further the idea of funding projects that seek to bridge the divides that Londoners experience, and we want to back organisations that not only support people who are at the edges of our society, but those that help bring those people in to the centre of society too.

3. Transitions

We want to help Londoners to thrive, and in order for them to do this there are often a range of barriers to overcome. This priority considers funding projects that enable Londoners to make the transition in their life that is important to them. This could be a young person wanting to break out of the cycle of being

in and out of education or employment, to moving in to long-term and sustained employment. It could be support for a survivor of domestic abuse to leave their relationship and begin the journey of re-building their life.

We know that making successful transitions can be difficult, and often there are many other steps to take before a person can achieve their original goal. This requires organisations and communities to work together in the best interest of the person making the transition, because getting the right support does change lives.

#### 4. Fairness and voice

Until we have representation at all levels, many assert a fair and equal society is near impossible to achieve. This funding priority looks at how best to support individuals and communities to develop voice, leadership and resilience. It also thinks about how to support ideas which will result in London being a city where everyone can thrive, and not the few, and where everyone has the rights to experience fairness.

We believe there are many ways to fulfil a fairer London through culture, environment, inclusion, participation, communities, public spaces and much more.

We know that there are likely to be a real diversity of ideas that we consider through the four headings above. As the strategy is developed, we expect that we may pull out certain themes and ideas that we want to explore more strategically too.

- **Funder ‘plus’ support and CBT’s toolbox**

We will commit to a funder ‘plus’ programme and a funding offer that shows a myriad of creative ways in which we will support our partners. This will include core funding, small grants, long-term grants, access to CBT’s cross-sectoral networks, consultancy support, exit strategy discussions etc. The support provided will be aligned to the priorities that we have outlined in our vision, mission, and values.

The exact details of the tools and approaches that we will use will be developed and shared with you as we develop and implement the next strategy.

- **CBT’s ambitions**

This strategy states the five key ambitions that we will commit to for the next five years, which can be summarised as making our processes as effective as they can be, working collaboratively, taking on leadership responsibilities, using all of our assets well, creating more giving, and encouraging learning between London, our regions, the UK and the world.

As the strategy evolves we will share examples of how we have achieved those ambitions, as well as working in partnership with others to consider new ways in which we could fulfil them.

- **A strategy that adapts and learns**

It is our privilege to be a funder, and we want to ensure that we are fulfilling the vision set out in this strategy by building in time to reflect on and learn from the work that we are doing.

Therefore, on an annual basis we will formally review our progress, with support from a range of internal and external partners. If we need to make some changes to our work then we will work with others to think about how best to do this.

# City Bridge Trust - Funding Strategy, 2018-2023 [DRAFT ONE]

## Bridging divides

CBT's vision and mission	CBT's values	What CBT will fund	Funder 'plus' support	CBT's toolbox	CBT's ambitions	A strategy that learns & adapts
<p>Our vision is that London should be a city where disadvantaged and marginalised individuals and communities are supported to not just survive, but to thrive too. We want to reduce the inequalities they face.</p> <p>Our mission is to use all of our knowledge, networks and assets to champion London's biggest asset - its people.</p> <p>As the City of London Corporation's charitable funder we are here to serve Londoners and the communities they connect to. We make these links directly, as well as through civil society, local, regional &amp; national Government, the private sector and the wider funding ecology.</p> <p>By bridging the divides and differences that exist within London we know we can help to create a city that works for everyone.</p>	<p>We believe that for London to be a city that works for everyone, we must live the following values in our work:</p> <ol style="list-style-type: none"> <li>1. Inclusion &amp; representation</li> <li>2. Care for the environment</li> <li>3. Early action - creating a society that acts earlier</li> <li>4. Working in ways that support Londoners, communities &amp; sectors to come together</li> <li>5. Being adaptive &amp; creative, with a clear sense of purpose</li> </ol> <p>We want to work with partners who share these values</p>	<p>As a funder working in London, we want to support great organisations, doing great work in pursuit of our vision, mission and values</p> <p>Our funding priorities/themes will be determined by the CBT Committee, and informed by a consultation process. We are considering these ideas at the moment:</p> <p>Funding well in a place</p> <p>Addressing inequalities</p> <p>Transitions</p> <p>Fairness &amp; voice</p>	<p>In order to support our partners to be the best they can be, we will offer them all access to the following support:</p> <ol style="list-style-type: none"> <li>1. Training</li> <li>2. Consultancy support</li> <li>3. Networking &amp; convening</li> <li>4. Access to our cross-sectoral networks and partners</li> <li>5. Support to develop partnerships</li> <li>6. Organisational development support</li> <li>7. Eco-audits</li> <li>8. Exit strategy</li> </ol>	<p>These are the ways in which we will give our money away -</p> <ol style="list-style-type: none"> <li>1. Core funding</li> <li>2. Small &amp; large grants</li> <li>3. Short &amp; long term commitments</li> <li>4. Ideas fund</li> <li>5. Match funding</li> <li>6. Access to giving</li> <li>7. Strategic initiatives</li> <li>8. Social Investment</li> <li>9. Research &amp; learning</li> </ol>	<ol style="list-style-type: none"> <li>1. Our processes will be fair, representative &amp; proportionate.</li> <li>2. We will work collaboratively with our partners; taking the lead when needed.</li> <li>3. We will use all of our assets well to support Londoners.</li> <li>4. We will encourage more &amp; better giving for the benefit of Londoners.</li> <li>5. We will encourage learning between London, our regions, the UK &amp; the world.</li> </ol>	<p>Every year we will review if the approaches laid out in this strategy are working.</p> <p>We will be clear about the things we want to change, and the things we want to carry on doing.</p>



## **CBT's next steps**

We want to work with internal and external stakeholders to develop the next versions of the strategy. In particular we are keen to co-create the ambitions that will sit beneath each of our funding streams, as well as gathering your views on how best to express our values. We will also be working with a range of partners to think about the most creative and straightforward ways in which we can develop our funder 'plus' and funding tools.

Please check our website to find out the ways in which we will engage you in these next steps.

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