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| <p>Committee(s):</p> <p>City Bridge Trust ('CBT') - for Decision</p> <p>Policy and Resources – for Decision</p> | <p>Date(s):</p> <p>14th November</p> <p>13th December</p> |
| <p>Subject:</p> <p>Philanthropy Strategy Implementation Plan</p> | <p>Public</p> |
| <p>Report of:</p> <p>David Farnsworth, Chief Grants Officer and Director of City Bridge Trust ('CGO')</p> | <p>For Decision</p> |
| <p>Report author:</p> <p>Fiona Rawes. Philanthropy Director</p> | |

Summary

Your Committee approved the Philanthropy Strategy on 2nd May 2018. As this is a joint strategy encompassing both CBT and the City Corporation, the Policy and Resources Committee also approved it on 7th June 2018, and the paper was shared with the Court of Common Council on 21st June 2018.

The strategy commits the City Corporation and CBT to contribute to higher impact and higher value philanthropy through our role modelling in London and our support for, and awareness-raising about it in the UK and Internationally. A one page summary of the vision and key workstreams is set out on the final page of the proposed implementation plan in the attached Appendix.

This paper now sets out the implementation plan for the Committee's review and approval.

Recommendations

Members are asked to:

1. Note the implementation plan set out in the Appendix.
2. Agree the proposed change to the strategic framework set out in paragraphs 11-13 of this report.
3. Endorse the implementation plan for onward approval by the Policy and Resources Committee at its December 2018 meeting.

Main Report

Background

1. At your September 2015 meeting, a report was presented setting out the broad range of philanthropic activities supported by CBT to encourage more philanthropy (the giving of time, money, talent and other assets).
2. As a result of the report, you resolved to commission an independent review to look at the effectiveness of the various strands of work supported by CBT and to make recommendations for CBT's future strategic direction in this arena.
3. Rocket Science were therefore commissioned to undertake this review and the CBT Committee reviewed the recommendations of their final report in July 2016. These included a recommendation to appoint a Head of Philanthropy Strategy to develop and deliver a new, joint philanthropy strategy for CoLC and CBT.
4. In October 2017, Fiona Rawes joined as the Philanthropy Director and initiated a strategic review: this drew on the Rocket Science findings alongside further internal and external consultation, and analysis of our operating context.
5. These created the foundations for the Philanthropy Strategy.
6. Your Committee approved a two-stage approach to the development of the Philanthropy Strategy, approving the strategic framework in your May 2018 Committee meeting and asking your officers to work through, and return with, an implementation plan in Autumn 2018.

Current Position

7. Whilst the implementation plan set out in the Appendix outlines actions to take effect from January 2019, your Committee should note that significant action has already been undertaken to capitalise on existing opportunities which reflect the priorities of the Strategy. For example, your Philanthropy Director has co-lead research into the level and impact of giving by the Financial and Professional services sector (launched at the Mansion House in September), sponsored and contributed CBT expertise into sessions at the Global Donors Forum (10-12th September) and served on the steering group for the Centre for London Research into 'Giving More, Better, Together' which was launched by CPR at the Guildhall on 4th September.
8. Considerable work has also been undertaken with a range of colleagues within and beyond the City Corporation to develop the Philanthropy House proposal for consideration (see separate paper, under pillars 2 & 3 of the strategy).

Proposals

9. The implementation plan in the Appendix sets out proposed activities from January 2019 – March 2020.

10. This timescale has been chosen on the basis that these activities create strong foundations and will enable a much deeper understanding of the scope, scale and impact of our current philanthropic activity as well as determining the priority partners for support and awareness raising. Once this scoping has been undertaken we will then be in a position to make robust choices about our priorities for the longer term and the phase 2 implementation plan (likely to run from March 2020 to the Philanthropy Strategy's conclusion in March 2023) will reflect this
11. Through the consultation on the implementation plan, it has become clear that the framing of one of the potential workstreams in the strategy could be improved
12. Whereas the strategy committed CBT and CoLC to *'testing how their philanthropic engagement reduces inequality and increases social mobility'*, we would like to amend this so that CBT and CoLC *'test how their philanthropic engagement **contributes to a reduction in inequality and an increase in social mobility**'*.
13. This is because it is notoriously difficult and resource-intensive to delineate a clear causal link between a particular intervention and a particular outcome (as there are typically myriad different factors in play). Also, as a funder, we operate at one stage remove from our funding partners who deliver the interventions, which further obscures the causal link. Stating that we 'contribute to' a particular outcome therefore feels like a much more accurate description of our role.

Corporate & Strategic Implications

14. The implementation plan contributes to outcome 3 (people have equal opportunities to enrich their lives and reach their full potential) and outcome 5 (businesses are trusted and are socially and environmentally responsible) of the Corporate Plan.
15. It also contributes to CBT's Bridging Divides outcomes, summarised as follows:
 - For London to be a city where all individuals and communities can thrive, especially those experiencing disadvantage and marginalisation.
 - To reduce inequality and grow more cohesive communities for a London that serves everyone.
 - To develop London further as a global hub for charitable giving and social investment.
 - To use all our financial and non-financial assets, working collaboratively, to achieve our ambitions.

Implications

16. **Financial:** the resourcing required to support the implementation of this strategy is set out on p.1 of the implementation plan. With the exception of the Social Mobility role, all staff posts have been approved/appointed and are in budget. The Social Mobility role is still under discussion.

17. **Legal:** The Comptroller and City Solicitor's Department is already playing an active role in advising and supporting on charitable compliance for our philanthropic efforts and this will continue.
18. **Property:** Any property interests resulting from the strategy are being developed and worked through separately and will be reviewed by the relevant committees.
19. **HR:** Will be playing a key role in supporting the commitments within the Social Mobility Strategy and building on the strong foundations already established to ensure a consistent range of policies and practices relating to our volunteering.
20. **Risks and Mitigations:** are considered in the implementation plan.

Conclusion

21. We are now at an exciting stage where all the careful preparatory work to build a better understanding of how we maximise our considerable potential in the philanthropic space has now been undertaken and we have a plan ready for implementation. Your officers look forward to working with your Committee to draw on their skills, networks and insights to ensure that the vision of the Philanthropy Strategy can be fulfilled, notably that individuals and communities, especially those experiencing marginalisation, thrive as a result of higher impact and higher value Philanthropy.

Appendices

- Appendix 1: Implementation Plan

Background Papers

Philanthropy Strategy Paper

- for City Bridge Trust Committee: 2nd May 2018
- for Policy and Resources Committee: 6th September 2018

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