

Committee: City Bridge Trust (CBT)	31 January 2019
Subject: Progress Report	Public
Report of: Chief Grants Officer and Director of CBT (CGO)	For information

Summary

This is a regular report by the CGO. You are asked within this report to note updates on the following:

- a) Bridge House Estates Annual report
- b) London's Giving
- c) Cornerstone Fund
- d) Brexit and the charitable sector
- e) HR Update
- f) Stepping Stones
- g) Heart of the City update
- h) Bridge to Work + Government Update

Recommendation

Members are asked to:

- a) Note the report.

Main Report

Introduction

You will recall that you have agreed that each of the CBT Committee Meetings will begin with a presentation on a particular area of interest for the committee. Annika Small, Director and Co-Founder of the Centre for the Acceleration of Social Technology (CAST), has agreed to speak at January's Committee meeting on digital skills and the challenges for Trusts and Foundations. Annika chaired the Citizenship session at the recent Digital Skills Summit at Mansion House.

Bridge House Estates Annual report

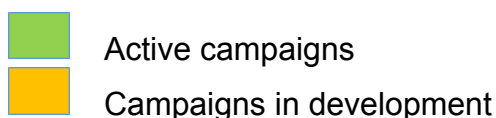
1. The Approval of the Annual Report and Financial Statements for Bridge House Estates (BHE) for the year ended 31 March 2018 has been delegated by the Court of Common Council to the Finance Committee, following recommendation by the Audit and Risk Committee. Finance Committee approved the report on 15th January 2019. The value of the

permanent endowment fund of the Charity, which was identified as part of the BHE governance review, is now included in these Financial Statements.

2. A further update will be provided to Members of this Committee by Karen Atkinson, Head of Charity & Social Investment Finance, at the meeting.

London's Giving

3. The Deputy Director attended an event on 4th December 2018 to celebrate London's Giving achievements to date, hosted by the Macquarie Group.
4. You may recall that you approved a grant of £300,000 over three years in March 2017 for London Funders to continue the development of local giving schemes in London. This work is being undertaken by Clare Thomas and Deborah Xavier who presented to your March 2018 Committee Meeting.
5. From the map below, you will see that there are currently 11 active campaigns and 9 in development. 'Active' means that the scheme is launched and is both receiving and distributing resources. 'In development' means that the scheme has not yet launched but does have dedicated staff resource in place or is in slightly earlier planning stages. Of the boroughs marked in blue, 9 have expressed interest in developing a local scheme and have met with either Clare or Deborah. This means that 29 boroughs have had some engagement with London's Giving.



6. Each of the active schemes gave a two-minute presentation, highlighting what was distinctive about them and their key achievements.
7. Last year, London Funders commissioned Rocket Science to undertake a formative evaluation of London's Giving, including working with the local schemes to develop some common metrics in order to enable reporting on the overall impact of London's Giving. Rocket Science has recently completed collating the first year's-worth of data and the event was an opportunity to share some headline statistics. During 2017/18, local giving schemes generated:
 - a) £2.29m of grants to 98 local projects, benefitting 8,182 local people
 - b) £189,000-worth of volunteering hours
 - c) £217,000 of in-kind support, including access to professional advice, use of venues, discounts on local services.
8. This data has provided a benchmark against which future years can be compared.
9. The event was also an opportunity to launch London's Giving's standalone website <https://londonsgiving.org.uk/>.

Cornerstone Fund

10. Interviews for the Cornerstone Fund Learning Partner were held at the end of October 2018. Of the three organisations shortlisted, Collaborate, a not-for-profit consultancy and research organisation, was the strongest candidate, showing the greatest experience and understanding of 'systems change' across civil society and the public sector.
11. An inaugural workshop was held on 28th November 2018 led by Collaborate, for the Cornerstone Fund organisations currently in receipt of development grants and the aligned funders. This was an opportunity for the funded organisations to share details of their respective projects; discuss our various views on what we mean by 'systems change' and to explore whether we can come to a shared definition of 'systems change'. Whilst all the projects are different, it was clear that there is huge scope for the various partnerships/collaborations to learn from each other (and this is already going on to some extent) and a clear sense that those funded feel part of a coherent cohort.
12. The first of the Cornerstone Fund Stage 2 applications for consideration by CBT, an application from H4All, can be found elsewhere in your papers today.

Brexit and the charitable sector

13. Members will be interested to hear how the sector is preparing for Brexit.

The Association of Charitable Foundations has produced several Brexit-related policy papers for its members and continues to point organisations to other relevant sources. One of the more recent guides comes from the National Council for Voluntary Organisations (NCVO), the infrastructure body for England's charitable sector, which published a Brexit briefing in late 2018. Whilst it highlights that much of the future relationship between the UK and EU post-March has yet to be decided, NCVO sets out four considerations voluntary organisations should work through over the coming weeks. These are: the potential economic impact of Brexit; employing EU nationals; EU funding; and the opportunities ahead.

14. NCVO's briefing advises members to assume that economic uncertainty and volatility will persist over the coming months. Noting the possible adverse impact on charitable investments, NCVO also highlights that any national economic downturn could result in greater demand for voluntary-sector services. On employment, the briefing points to data from the Institute for Public Policy Research (IPPR) which highlighted that somewhere between 80 – 90% of EU nationals currently working in the charity, social and residential care sectors would be ineligible to work in the UK post-Brexit under current migration proposals. Members are advised to remain briefed on changes to immigration policy as well as rules for employing workers from outside the UK. This latter point is significant since Government guidance on EU citizens has superseded the IPPR data NCVO referred to.
15. The briefing discusses EU funding to the voluntary sector, noting the UK government's commitment to underwrite all EU funding commitments to the sector until the end of 2020, even in the event of a no-deal Brexit. NCVO's document concludes with some horizon-scanning, noting that whilst attention is focused on the terms of departure, beyond Brexit there is scope for government to amend several key policy areas for charities, notably VAT reform, state aid, and giving greater consideration to social value in public procurement.

Source materials

https://www.ncvo.org.uk/images/documents/policy_and_research/europe/NCVO-Brexit-factsheet.pdf

HR Update

16. I'm delighted to welcome Ruth Feder to the team as co-Head of Impact and Learning. Ruth joins from Independent Age, a previous City Bridge grantee, where she worked as Evaluation Manager on the Campaign to End Loneliness. She is job-sharing with Jemma Grieve Combes, and the two will be working together to develop the Trust's learning strategy as well as taking steps to ensure that our monitoring and evaluation practice is benchmarked against that of other Foundations.
17. We completed our recruitment for a new Funding Manager in late

December and received a high-level of interest from well qualified candidates. From what was a strong field at both shortlisting and interview, we have appointed Samantha Grimmett Batt, Senior Grants Officer at The Clothworkers' Foundation. She will start with us on 26th February, so you will have the opportunity to welcome her at your March meeting.

18. Stephanie Keating, EA to David Farnsworth and the senior leadership team is now in post. Stephanie will be working Wednesday to Friday. Stephanie's job share partner, Gemma Murrells will be starting in post on 04th March 2019 on her return from maternity leave.
19. Following a successful interview, Carole Wilkins has been appointed to the post of Business Support Manager and will start in post on 5th February 2019.
20. The Volunteering Manager post is out to advert, with the closing date set for Monday 21st January 2019. Interviews will be held week commencing 28th January.
21. The interviews for a full time Funding Officer have taken place and an offer has been made. A further update will be provided to this committee once the contractual processes have been completed.
22. The Charity and Philanthropy Communications Manager post has been shortlisted and interviews will be held at the end of January 2019.
23. Robert Folkes has been recruited on a temporary basis to cover the Charity Accountant position whilst a permanent replacement is found. The closing date for the permanent position has been set as 18th January 2019.

Stepping Stones

24. By the date of this meeting, the Stepping Stones Finance Facility will have been launched at an event hosted by UBS on 25th January. Members will recall that Stepping Stones is the Trust's partnership programme with UBS to support London charities and social enterprises who wish to engage with the social investment market. Papers to Committee over the last several months have highlighted that organisations still find start-up loans difficult to access, and often expensive. The Stepping Stones Finance Facility is an affordable loan facility for organisations who have completed their Stepping Stones grant. We are delighted that the scheme continues to involve UBS and that we are joined by a new partner, The Clothworkers' Foundation. Loans will be capped at £50,000 and we anticipate awarding no more than six (between all three partners) each year.

Heart of the City

25. Heart of the City (HotC) in partnership with CBT delivered a learning event on "Introduction to Building Corporate Relationships" on 9th January 2019.

The event was fully booked within 3 hours when advertised in December, with a waiting list of approximately 50. The learning event is part of the ongoing 5 year partnership between HotC and CBT, with HotC supporting CBT's Funder Plus offer through learning events and one to one surgeries. A programme of events is to be developed with CBT across the remainder of the lifetime of the partnership.

26. The event was hosted by Grant Thornton, one of the SME companies that HotC works with, who also presented from a business perspective. The event covered:

- a) Why develop relationships with companies?
- b) What are Companies looking for?
- c) How to reach companies?
- d) Perspective from a company,
- e) Perspective from a charity partner, and;
- f) Q&A

27. The event feedback was excellent with 25 responses from 33 attendees. 23 reporting the event as very good or excellent; 20 reporting the event as useful for learning and developing new ideas; and a variety of responses informing HotC of the most useful part of the event and ideas for improvement. The attendees were asked to identify other topics which would be most useful for further events facilitated by either HotC or CBT or both. The feedback has been shared to inform the development of the CBT Funder Plus offer. Kate Moralee will be working with HotC and colleagues to plan further training and one to one surgeries.

Bridge to Work Government Update

28. As Members know, one of the aims of the Bridge to Work programme is to influence government policy and help unlock further good quality support for disabled people seeking to access employment. The Prime Minister's Special Adviser on Disability and Welfare (Jean-Andre Prager) was a guest at your most recent Annual Dinner and over the last few months, your project manager, James Lee, has held robust and frank discussions with Mr. Prager to share information gained through the delivery of Bridge to Work.

29. There is a significant and growing body of evidence - supplied by ourselves and others – which demonstrates the value and effectiveness of the delivery methods that you are funding (eg personalised support, long-term view, voluntary participation, supported work experience). Based upon that evidence, just before Christmas, the Department for Work and Pensions (DWP) announced the launch of a £40m fund which now supports a very similar approach.

30. <https://www.gov.uk/government/news/40-million-personalised-support->

[package-for-long-term-unemployed-disabled-people-launched](#) (Officers were pleased to see the lead supporting quote come from Neil Heslop, CEO of Leonard Cheshire, who spoke at the launch event for Bridge to Work which was held at Speaker's House in Parliament).

31. Whilst the creation of this fund is not due to our evidence alone, it can certainly be said that we played a part in convincing colleagues at the DWP to invest in this type of long-term programme. It is a strong example of how grant-funding can be used to test and prove innovative approaches to support – and then go on to unlock further sums of money from budget holders in government. Your officers are in the process of finalising the first year evaluation of the Bridge to Work scheme and will circulate the finished report in due course.

David Farnsworth

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