

Committee: Policy and Resources Committee – for Decision	Date: 21 February 2019
Subject: Philanthropy Strategy Implementation Plan	Public
Report of: David Farnsworth, Chief Grants Officer and Director of City Bridge Trust	For Decision
Report author: Fiona Rawes, Philanthropy Director	

Summary

This Committee approved the Philanthropy Strategy on 7 June 2018. As this is a joint strategy reflecting the common aims of the City of London Corporation itself, and as trustee of Bridge House Estates (BHE), in collaborating to support philanthropy, the City Bridge Trust ('CBT') Committee also approved the strategy on 2nd May 2018 for BHE (consistent with the objectives of CBT's Bridging Divides Strategy), and the paper was shared with the Court of Common Council on 21st June 2018.

The strategy commits the both the City Corporation itself, and as trustee of BHE (through the activities of CBT its funding arm), to contribute to higher impact and higher value philanthropy through their role modelling in London and their 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 second page of the proposed implementation plan in the attached Appendix.

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

Recommendations

Members are asked to:

1. Agree the proposed change to the strategic framework set out in paragraphs 11-12 of this report.
2. Note and endorse the implementation plan set out in the Appendix.

Main Report

Background

1. In 2016, the City Bridge Trust Committee commissioned an independent review to look at the effectiveness of the various strands of work supported by the Committee in its funding activities for Bridge House Estates (BHE) with a view to making recommendations for City Bridge Trust's (CBT) future strategic direction in this arena. This review recognised the broad range of philanthropic activities already supported by CBT in furthering BHE's ancillary object for charitable purposes for the general benefit of the inhabitants of Greater London.
2. Rocket Science were therefore commissioned to undertake this review which took place concurrently with the City Corporation's Strategic Grants Service Based

Review (which was corporate wide). The CBT Committee reviewed the recommendations in July 2016. These included a recommendation to appoint a Philanthropy Director to develop and deliver a new, joint philanthropy strategy for the City of London Corporation itself (CoLC) and, as trustee of BHE, through the work of CBT.

3. 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.
4. These created the foundations for the Philanthropy Strategy.
5. This Committee approved a two-stage approach to the development of the Philanthropy Strategy, approving the strategic framework in your June 2018 Committee meeting and asking your officers to work through, and return with, an implementation plan in Autumn 2018.
6. The Philanthropy Strategy is consistent both with the City Corporation's overarching Corporate Plan and with the policy adopted as trustee of BHE through the activities of CBT – *Bridging Divides 2018-2023*.

Current Position

7. Whilst the implementation plan for the Philanthropy Strategy set out in the Appendix outlines actions to take effect from January 2019, this 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-led research into the level and impact of giving by the Financial and Professional services sector (launched at the Mansion House in September), curated CBT input 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, for BHE, the Philanthropy House proposal for further consideration by the relevant committees. This work is ongoing.

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 the City Corporation's current philanthropic activity, itself and as trustee of BHE, 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 in two important respects:

11.1 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**’.*

- 11.2 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.

12. Secondly, the legal advice received in the context of Philanthropy House has highlighted the need to clearly distinguish between the role of the City Corporation acting in its general corporate capacity and as trustee of BHE through the activities of CBT. Clarification is therefore now included in the strategy by the addition of some introductory text as follows:

“This Strategy has been prepared jointly by the City Corporation as trustee of Bridge House Estates (1035628) and for itself in pursuing its general corporate objectives, setting out the common aims and with a view to collaborating to increase the impact and value of philanthropy.”

Corporate & Strategic Implications

13. 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.
14. It also contributes to CBT’s *Bridging Divides* Strategy 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

15. **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.
16. **Legal:** the Comptroller and City Solicitor's Department is already playing an active role in advising and supporting on charitable compliance for CBT's philanthropic efforts and this will continue.
17. **Property:** Any property interests resulting from the strategy are being developed and worked through separately and will be reviewed by the relevant committees.
18. **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.
19. **Risks and Mitigations:** are considered in the implementation plan.

Conclusion

20. 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 through collaborative working and engagement 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: 7th June 2018

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