

Committee: City Bridge Trust (CBT)	26th September 2019
Subject: Progress Report	Public
Report of: Chief Grants Officer and Director of CBT (CGO)	For Decision

Summary

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

- a) Changes to committee reporting and processes
- b) Small Grants Programme Review
- c) HR Update
- d) Anniversary of the Disability Discrimination Act
- e) Update on and reframing the wording of CBT Values
- f) Philanthropy House
- g) Grant Advisor UK
- h) Grantee impact and learning survey
- i) Responding to the Resilience Risk
- j) Brexit

Recommendation

Members are asked to:

- a) Note the report.
- b) To agree that the requirement to include the Cost of Raising Funds (CoRF) in the grant's assessment finance table is removed

Main Report

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. Rachel Rank, CEO of 360Giving from 360Giving has kindly agreed to speak at the lunch prior to the Committee meeting.

360Giving supports organisations to publish their grants data in an open, standardised way and helps people to understand and use the data in order to support decision-making and learning across the charitable sector.

Changes to committee reporting and processes

1. Following discussion with your Chair, several changes have been made to the format of your committee papers.
 - a) Grantee application forms are no longer provided within the main body of the papers.
 - b) The grant assessment reports continue to be included in the main body of the papers.
 - c) The details of grants recommended for approval between £50k and £250k are provided in a tabular format in a separate report. This includes strategic initiatives.
 - d) The proposed delegated authority levels that were approved by this committee in July, were presented to Court of Common Council on 12th September 2019. These were approved, subject to an amendment as indicated in italics below (the original wording has been struck through). Reports on grants approved under these new levels of delegation will be brought to your October meeting onwards.
 - (i) Applications of up to £50,000 may be approved by the CGO;
 - (ii) Applications of between £50,001 and £100,000 to be approved by the CGO, *in consultation with the Chair and Deputy Chair, with reference to the Chamberlain;*
 - (iii) Applications of more than £100,000 to be approved by the Committee
2. In the current finance table that is presented to you as part of the grant assessment report, the Cost of Raising Funds (CoRF) is included. It is proposed that moving forward this is not included as the information is not imperative to inform Member decisions, forward estimates are generally very difficult to verify, and this would simplify the Funding Manager assessment greatly. In those limited situations where a Funding manager is concerned within the expenditure in this area, this would be highlighted within the narrative.

Small Grants Programme Review

3. Your Small Grants Programme was launched as part of Bridging Divides in April 2018. You will recall that it provides funding of up to £10,000 over one year for organisations with an income of £75,000 or less. It uses a shorter application form and the assessment process is designed to be a lighter touch but not a soft touch! Funding priorities are currently:
 - a) Greening and growing projects which bring communities together and improve the local environment.
 - b) Projects which enable disabled people and/or older people who are disadvantaged to actively participate in the arts, sports and health and well-being opportunities.
4. To date there have been 32 applications received with 15 funded, 14 declined and 3 under assessment – a success rate which mirrors that on your “main” programmes and is good within the grant-making sector as a whole.

5. It was always intended that the Programme be reviewed after a full year of operation to determine if the criteria, processes and reach were the best they could be. The intention was to bring a review report to this Committee but there are a number of meetings and events within the sector this month (September) which might have an important bearing on the eventual recommendations – such as the London Funders meeting to discuss how funders can better support those boroughs with a low uptake of grants (the “Cold Spot” boroughs); a meeting of funders arranged by Consortium to discuss funding to the LGBT+ sector (and to incorporate the data from your recent commissioning of the interactive map of LGBT services in London); and a recent survey of funders of small grants, undertaken by London Funders on behalf of the Trust.
6. It is intended to discuss the learning from the survey and from these meetings within the staff team prior to taking a report to your November Committee with recommendations for how to amend the Small Grants Programme to make it as relevant and effective as possible.

HR Update

7. Anita Williams, a CBT Funding officer left the Trust on 6th September. Anita had been with the Trust for over 13 years, so I would like to take this opportunity to formally thank Anita for all her hard work over the years.

Anniversary of the Disability Discrimination Act

8. Next year (2020) will mark the confluence of two significant anniversaries. It will be the 25th anniversary of CBT and the 25th anniversary of a landmark piece of legislation: the Disability Discrimination Act. CBT can rightly be proud of all it has done to support disabled people across a broad spectrum of projects and programmes over the last 25 years. The Trust has provided vital support to many organisations that seek to make society a more equitable place for disabled people.
9. CBT has funded projects that have successfully empowered people to avert crisis and that support the most disempowered who are in the very depths of crisis. CBT has actively embraced the spirit of the DDA and has used its resources to support both the proactive and reactive; the progressive and the pressing.
10. Over the last 25 years CBT has supported support disabled people across London and remains committed to creating a more equitable society for all through its programmes such as Bridge to Work (and others).
11. Recent research shows the needs to support people with disabilities remains as great as ever, as tax and welfare reforms mean that disabled households will lose out substantially. Households where someone is disabled will receive £1,910 a year less on average. Households with both children and a disabled person will be particularly affected, receiving £3,760 a year less on average by 2021-22 – a 9.8% loss.

12. In order to take advantage of this important anniversary, and increasing needs, we will seek opportunities to communicate CBT's impact in this area and lessons learnt and use the occasion to flag continuing needs and trends for people in the Capital living with disabilities. We will investigate, with our partners in the disability fora, where the optimum chance lies to have the greatest impact.

Update on and reframing the wording of CBT Values

13. In July, this Committee considered a report of your CGO, authored by your joint Heads of Impact and Learning, summarising a review of Bridging Divides' Values, including research, interviews and surveys with Members and officers conducted by Bridging Divides' Learning Partner, Renaisi, in June 2019 and final recommendations for changes made by officers. Your CGO introduced the report and outlined the recommended changes to the Bridging Divides values.

14. Members were supportive of the Values proposals but suggested that the wording be reframed to acknowledge limitations and the aspiration towards continuous improvement in achieving those values. A Member questioned that "representative" had been removed as a value, as had feedback from your officers, so in the spirit of Bridging Divides being a strategy that learns and adapts, it is now reinstated. The final values are therefore:

15. We aim to be: inclusive, representative, environmentally responsible, collaborative, adaptive and progressive.

16. Your learning partner, Renaisi, is drafting a framework to ensure that the values are implemented as a golden thread through all of our activity. A group of your officers, led by your Philanthropy Director and your Deputy Director, will implement this framework to ensure it has traction both within the team and the Corporation, as well as with our external stakeholders.

Philanthropy House

17. An update on Philanthropy House is provided in a non-public appendix to this report.

Grant Advisor UK

18. CBT is taking part in a pilot of 'Grant Advisor UK', an online service that aims to facilitate open and honest feedback between grant makers and third sector organisations by collecting anonymous, authentic, real-time comments of grantseekers' experience of working with grant makers (somewhat like tripadvisor but for grant-making). The service is already successfully running in the US and Centre for the Acceleration of Social Technology (CAST) is piloting a UK version. 10 other funders are already taking part in the pilot including Esmée Fairbairn Foundation, Paul Hamlyn Foundation and the National Lottery Community Fund.

26. Interestingly a significant minority did not feel CBT had a role in supporting their monitoring and evaluation work. This may reflect the diversity of organisations CBT funds and the relative impact of CBT funding, and may also reflect organisational capacity and focus.
27. When asked how CBT can best use and value the data, information and knowledge it holds, the most popular response was to influence policy makers and funders; bring together organisations working on similar issues; and to share the Trust's findings.
28. The survey findings and grantee ideas will be fully explored as part of the implementation of the impact and learning strategy.

Responding to the Resilience Risk

29. Further to the update in your July papers on the Responding to the Resilience Risk initiative (RRR), the selection panel met on 23/08/19 to consider the nine shortlisted proposals to support and develop the resilience of frontline staff. The panel recommended funding six of the nine proposals, which together have a recommended funding value of £78,990, which is well inside the total £100K grants budget for this initiative.
30. Renaisi, your Learning Partner for Bridging Divides, successfully tendered and completed a selection process for the evaluation contract for RRR. Initial work for the evaluation contract is underway and baseline data is currently being collected. The six groups selected to take part in the pilots are: The ClementJames Centre; Fine Cell Work; Mind in the City, Hackney and Waltham Forest; The Listening Place; Toynbee Hall and Just for Kids Law. Five of these groups are known to CBT with the exception being Just For Kids Law.
31. Pilots are due to get underway in early October and culminate in March 2020. Renaisi will evaluate the six pilots with a view to having initial findings ready for a learning event in May 2020, during Mental Health Awareness Week. Your officer continues to engage with the Resilience forum convened by London Funders. A more detailed evaluation report will be published in August 2020.

Brexit

32. CBT has remained in close contact with other funders through our membership of London Funders (the umbrella organisation for funders in London including all the boroughs, London Councils and the GLA). An extract from their recent update is included below for your information:
33. *"We've been surveying members about how prepared funders are for Brexit, whether they have seen any positive or negative impacts related to Brexit already, and what is on their radar in relation to Brexit developments - especially given that a no deal is looking increasingly likely."* Their survey is still open if you haven't already fed in your views - [click here](#) to answer eight key questions.

34. The results of the London Funders survey of how prepared funders are for Brexit is as follows: *‘only one in five of our member funders is actively involved in a planning or preparedness group for Brexit (20.8%), and three in five don’t feel prepared (with 36.5% of respondents saying they felt “prepared” and just 3.8% said “very prepared”)*.
35. London Funders also asked whether funders had seen any impact (positive or negative) related to Brexit already, with two in five saying they had (41.5%). The majority of responses were not on the positive side – people reported:
- a) increased demand for advice provision (and thus funding for this)
 - b) concerns about settled status (with vulnerable groups such as looked-after children highlighted)
 - c) community cohesion and funding being needed to support work in communities
 - d) grantees reporting challenges with workforce (e.g. on adult social care)
 - e) greater uncertainty about funding streams (be this the future of ESF, or the impact of Brexit on investments)
 - f) concern that individual and corporate donors were holding back decisions on community investment (or were moving away from investing in the UK)
 - g) and wider concerns about how linked political developments (such as the one-year spending review) would impact on the ability of local authorities and others to plan ahead.
36. Looking ahead, 94.3% of respondents identified concerns for how Brexit may negatively impact on their work – alongside the issues people said they were already seeing, additional points around data, food, hate crime, health, advice and other sectors being affected, together with concerns about the economic environment, the likely increase in the volume of funding applications, and the continued need to invest to address inequality and poverty.
37. In response to the survey London Funders are hosting the following meetings:
- a) *Community cohesion* – with colleagues from the Ministry of Communities, Housing and Local Government – 26th September
 - b) *ESF and European funds* – with colleagues from London Councils – 26 September
 - c) *Food* – with colleagues from the Trussell Trust – 8th October
 - d) *Health and social care* – speaker from public health, tbc – 9th October
38. London Funders will then hold a meeting on October 16th to bring together all of these issues, so that they can consider any cross-cutting themes, and also explore the options for how we can work together (including looking at what options there could be for collaboration between funders, and how London Funders can support you to make this happen).
39. The rest of the sector has been thinking about the implications of a no deal Brexit as well. A letter has recently been published, coordinated by ACEVO and co-signed by charity leaders, warning [against a no deal Brexit](#) and expressing grave concerns on the impact it will have on civil society.

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