



The City Bridge Trust Committee

Date: THURSDAY, 25 MARCH 2021

Time: 1.45 pm

Venue: <https://youtu.be/2ODdmcMsaL0>

Members: Dhruv Patel (Chair)
Deputy Dr Giles Shilson (Deputy Chair)
Karina Dostalova
Simon Duckworth
Marianne Fredericks
Alderman Alison Gowman
Deputy Jamie Ingham Clark
Alderwoman Susan Langley
Deputy Edward Lord
Jeremy Mayhew
Wendy Mead
Paul Martinelli
Judith Pleasance
Deputy Richard Regan
The Rt. Hon. The Lord Mayor (Ex-Officio Member)
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

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Accessing the virtual public meeting

Members of the public can observe this virtual public meeting at the below link:

<https://youtu.be/2ODdmcMsaL0>

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John Barradell
Town Clerk

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 28 January 2021.

For Decision
(Pages 1 - 8)
4. **OUTSTANDING ACTIONS**
Report of the Town Clerk

For Information
(Pages 9 - 10)
5. **UPDATE REPORT OF THE CHIEF GRANTS OFFICER AND DIRECTOR OF CBT (CGO)**
Report of the Chief Grants Officer and Director of City Bridge Trust (CGO)

For Decision
(Pages 11 - 18)
6. **JOINT PHILANTHROPY STRATEGY IMPLEMENTATION - UPDATE AND FUTURE PLANS**
Report of the CGO

For Decision
(Pages 19 - 38)
7. **THE PRINCE'S TRUST STRATEGIC GRANT**
Report of the CGO

For Decision
(Pages 39 - 50)
8. **GRANTS BUDGET AND APPLICATIONS TODAY**
Report of the CGO

For Decision
(Pages 51 - 56)

9. GRANTS AND STRATEGIC INITIATIVES RECOMMENDATIONS AND ASSESSMENTS

To consider the CGO's reports on grant recommendations as follows:-

Summary of Bridging Divides (Pages 57 - 58)

- a) Funds Ordinarily Approved Under Delegated Authority

For Decision
(Pages 59 - 70)

10. TO CONSIDER REPORTS OF THE CGO AS FOLLOWS: -

- a) Funds Approved or Declined under Delegated Authority

For Information
(Pages 71 - 78)

- b) Applications Recommended for Rejection

For Decision
(Pages 79 - 82)

- c) Withdrawn and Lapsed Applications

For Information
(Pages 83 - 84)

- d) Variations to Grants/Funds Awarded

For Information
(Pages 85 - 88)

- e) London Community Response Fund Grants Approved under Delegated Authority - Wave 5

For Information
(Pages 89 - 90)

- f) City Bridge Trust Communications & Events Attended

For Information
(Pages 91 - 100)

- g) Grief Encounter: Learning Case Study

For Information
(Pages 101 - 104)

11. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE

12. ANY OTHER BUSINESS THAT THE CHAIRMAN CONSIDERS TO BE URGENT

13. 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.

For Decision

Part 2 - Non-Public Agenda

14. NON-PUBLIC MINUTES

To agree the non-public minutes of the meeting held on 28 January 2021.

For Decision
(Pages 105 - 106)

15. INTERIM BRIDGING DIVIDES REVIEW RECOMMENDATIONS - TO FOLLOW

Report of the CGO

For Decision

16. PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS

Report of the CGO

For Information
(Pages 107 - 110)

17. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE

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

Agenda Item 3

THE CITY BRIDGE TRUST COMMITTEE Thursday, 28 January 2021

Minutes of the virtual meeting of the City Bridge Trust Committee held on Thursday,
28 January 2021 at 1.45 pm

Present

Members:

Dhruv Patel (Chair)
Deputy Dr Giles Shilson (Deputy Chair)
Simon Duckworth
Marianne Fredericks
Alderman Alison Gowman
Deputy Jamie Ingham Clark
Alderwoman Susan Langley
Deputy Edward Lord
Jeremy Mayhew
Wendy Mead
Paul Martinelli
Judith Pleasance
Jannat Hossain (Co-opted Member)
William Hoyle (Co-opted Member)

Officers:

| | |
|------------------------|--|
| David Farnsworth | - Chief Grants Officer & Director of City Bridge Trust (CGO) |
| Karen Atkinson | - Chamberlain's Department |
| Nathan Omane | - Chamberlain's Department |
| Woedem Omane | - Chamberlain's Department |
| Anne Pietsch | - Comptroller and City Solicitor's Dept. |
| Fiona Rawes | - Head of Philanthropy Strategy |
| Jenny Field | - City Bridge Trust |
| Ciaran Rafferty | - City Bridge Trust |
| Tim Wilson | - City Bridge Trust |
| Lily Brandhorst | - City Bridge Trust |
| Matthew Robinson | - City Bridge Trust |
| Sandra Jones | - City Bridge Trust |
| Kate Moralee | - City Bridge Trust |
| Catherine Mahoney | - City Bridge Trust |
| Geraldine Page | - City Bridge Trust |
| Ruth Feder | - City Bridge Trust |
| Natalie Jordan | - City Bridge Trust |
| Samantha Grimmatt-Batt | - City Bridge Trust |
| Kate Halahan | - City Bridge Trust |
| Caspar Cech-Lucas | - City Bridge Trust |
| Clara Espinosa | - City Bridge Trust |

| | |
|---------------|---------------------------|
| Lydia Parr | - City Bridge Trust |
| Joseph Anstee | - Town Clerk's Department |
| Amelia Ehren | - Town Clerk's Department |
| Jen Durrant | - Town Clerk's Department |
| Aasha Farah | - Town Clerk's Department |
| Emma Horrigan | - Town Clerk's Department |

Also in attendance:

Dinah Cox

1. **APOLOGIES**

Apologies for absence were received from Karina Dostalova and Deputy Richard Regan.

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

There were no declarations.

3. **MINUTES**

RESOLVED – That the public minutes and non-public summary of the meeting held on 26 November 2020 be agreed as an accurate record.

Matters Arising

The Chief Grants Officer and Director of City Bridge Trust (CGO) advised with regards to the Responding to the Resilience Risk initiative that the Oak Foundation were still considering the matter, and it was hoped an update could be brought to the next meeting.

A Member then raised an outstanding question relating to the Risk Register. The Chair requested the relevant update and advised the matter could be added as an outstanding action.

4. **OUTSTANDING ACTIONS**

The Committee received the list of outstanding actions, noting those which were on the agenda or were scheduled for a future date or meeting.

RESOLVED – That the Outstanding Actions update be noted.

5. **ANNUAL REVIEW OF THE COMMITTEE'S TERMS OF REFERENCE**

The Committee considered a report of the Town Clerk inviting the Committee to review its terms of reference. A Member suggested that, in line with Charity Commission guidance, the Committee could consider a maximum of length of service for Members when the Committee or its successor was reconstituted. The Chair responded that this should be taken forward for consideration by the prospective Bridge House Estates (BHE) Committee.

RESOLVED – That the terms of reference of the Committee be approved for submission to the Court as set out in the appendix.

6. **CHIEF GRANTS OFFICER'S (CGO) REPORT**

The Committee received the regular progress report of the Chief Grants Officer and Director of City Bridge Trust (CGO) and discussed the updates provided.

The Prince's Trust

The Committee welcomed Venla Freeman and Rozzy Amos to speak to Members regarding the Prince's Trust (PT), on the work that the PT has undertaken in London since the start of the Covid-19 pandemic, as well as providing a brief outline of future plans, with CBT's 10-year strategic partnership with the PT approaching the end of its sixth year. The Committee was thanked for their invitation and advised that organisations were reassured and grateful to have supportive funders such as CBT, particularly during such difficult times.

The Prince's Trust reported that 8278 Young Londoners had been supported through their partnership with CBT, and this number was set to increase. The partnership had enabled PT to plan longer-term and pilot new innovative approaches, focus on early prevention and intervention, grow PT's network of partners to extend its reach, and expand courses to meet the diverse interests and needs of young Londoners, developing skills and confidence to thrive.

PT had responded to the COVID-19 pandemic with offers like Online Crisis Mentoring to young people struggling with isolation, lost opportunity, and poor mental health. Employment workshops and industry webinars also provided ongoing skills development, with a Virtual Jobs Board, advertising live job vacancies. Personal and Social Development group sessions brought young people together to improve confidence, reduce anxiety, build connections and set goals. Development Awards were pivoted to support digital poverty and an Enterprise Relief Fund was launched to support those new to self-employment, and who would not otherwise qualify for Government support.

Whilst the pandemic had presented PT with financial challenges, it also made the Trust's work more important than ever, and in the last 10 months PT had rapidly developed digital content and improved access for young people, and would focus resources where they could make the most difference for the next 3-5 years, to maximise societal impact. There would also be a stronger focus on employment, more asked of employers in key London industries, close working with London Councils, conscious collaboration and more focused work on key community groups, and improved support for PT's education network.

In response to questions from Members, the Committee was advised that education would be a key issue going forward, and that PT would focus on access, and across organisations, to mitigate against the impact of COVID-19. PT would also focus on mental health, both inside and outside of education. PT also advised that they were unlikely to return to a fully in-person offer, but aimed to retain all support by developing their understanding of where impact was being made and evaluating their blended offer. PT had also had conversations about extending the reach of their programmes, with more partnership opportunities and an expanded entrepreneurial skills offer.

The Chair then thanked Rozzy Amos and Venla Freeman for their excellent presentation and Members for their questions and discussion.

Interim Review of Bridging Divides

A Member noted that CBT was currently working with multiple partner organisations and sought assurances that they were co-ordinated. The CGO responded that it was important learning was not in silo, but partner organisations were recruited for distinct areas of activity, such as the Cornerstone Fund or Bridge to Work programme, and each was appointed following a procurement process. The CGO advised that there would be direct engagement with Members on the Bridging Divides review and framing additional spend later in the agenda and to come.

In response to a question from a Member regarding discussion on the additional allocation to Bridging Divides from Bridge House Estates at the Resource Allocation Sub Committee, the Chamberlain advised that Charity Commission guidance set out the expectation that Trustees recognise at an early stage where a charity may be facing financial difficulties, and robust forecasting was required as part of that. The amount allocated may be reconsidered in this context, however this was still to be decided. The Chamberlain advised that the matter would be considered by the February meeting of the Finance Committee, with the recommendation of annual budgets to the March Court of Common Council meeting expected.

The CGO advised that alongside the review, CBT was still undertaking grant-making activity, particularly working with other funders and with existing grantees.

Planned Retirement of CBT Deputy Director

The CGO advised the Committee of the planned retirement of the Deputy Director of CBT Jenny Field later that year. The CGO added that there would be further opportunity to thank and celebrate Jenny, and her departure would be a massive loss to CBT. CBT were working towards a handover, and the CGO further advised of a successful recruitment to an additional Funding Director post. A revised organogram would be circulated in due course. The Chair then paid tribute to Jenny Field and expressed his hope that there would be further opportunity to recognise her enormous contributions to CBT

RESOLVED – That the report be noted.

7. **THE BRIDGE PROGRAMME FUNDER PLUS OFFER**

The Committee considered a report of the CGO concerning proposals for the continuation of CBT's Funder Plus programme. The CGO introduced the report and drew Members' attention to the key points, also outlining the work undertaken as part of the programme so far, and the impact of COVID-19 on the programme.

RESOLVED – That the City Bridge Trust Committee:

- a) Approve a grant of £150,000 to the Cranfield Trust towards continuing the Triage and Connect programme to support the delivery of the next phase of the programme, subject to the satisfactory review of their financial assessment by the Charities Finance Team (representing the Chamberlain);
- b) Approve a grant of £150,000 to Locality towards continuing the Triage and Connect programme to support the delivery of the next phase of the programme, also subject to the satisfactory review of their financial assessment by the Charities Finance Team (representing the Chamberlain); and
- c) Commit up to £60,000 non-grants expenditure in order to procure, through the City of London's procurement process, a Managing and Learning Partner to provide capacity to continue the next phase of the programme.

8. DELEGATED AUTHORITY THRESHOLD REVIEW

The Committee considered a report of the CGO summarising grant making made under temporary arrangements in respect of the corporate scheme of delegations and CBT delegated authority policy, which had been in place since April 2020, and seeking approval to implement the existing arrangements on a permanent basis, due to imminent changes in staff structure and volume grants to be approved.

In response to questions from Members, the CGO confirmed that delegations were for the overall grant rather than annual instalments of multi-year grants, and clarified that there were three Funding Director posts within the CBT senior leadership team. The CGO proposed an amendment to the wording to make explicit that the figures referred to in the delegations were the total amount.

RESOLVED – That the City Bridge Trust Committee:

- a) Note the current City Bridge Trust thresholds for grant approvals under delegated powers, and the Scheme of Delegation to Officers in respect of the Chief Grants Officer and Director of City Bridge Trust (CGO);
- b) Recommend the proposed amendment to the Scheme of Delegation to Officers as set out, for the approval of the Policy and Resources Committee and the Court of Common Council;
- c) Agree that the existing CBT delegated authority thresholds, as set out with the above amendment, should be implemented on a permanent basis, subject to the approval of the Court of Common Council; and
- d) Agree that grant application rejections can be approved under the revised delegated authority proposals.

9. **UPDATE ON LONDON'S GIVING**

The Committee received a report of the CGO providing Members with an update on London's Giving, an initiative currently hosted by London Funders. The Chair introduced the item and proposed that London's Giving be invited to present to the Committee when it was next appropriate.

A Member queried whether a borough other than the City of London had been omitted from the table set out in the report. The Deputy Chair advised that Croydon appeared to be missing. The CGO responded that officers would check this and recirculate the information after it had been corrected.

RESOLVED – That the report be noted.

10. **GRANTS BUDGET AND APPLICATIONS TODAY**

The Committee received a report of the CGO summarising grant applications recommended for decision at the meeting, and those that had been considered since the last meeting under schemes of delegation. The CGO introduced the report and gave Members some further detail on the current picture. The CGO further advised that officers were optimistic that the annual grants budget would not be exceeded.

RESOLVED – That the report be noted.

11. **TO CONSIDER REPORTS OF THE CGO AS FOLLOWS: -**

a) **Funds Approved or Declined under Delegated Authority**

The Committee received a report of the CGO which advised Members of thirty-six expenditure items, totalling £3,906,979, which had been presented for approval under delegated authority to the CGO in consultation with the Chair and Deputy Chair.

RESOLVED – That the report be noted.

b) **Applications Recommended for Rejection**

The Committee considered a report of the CGO outlining a total of five grant applications that were recommended for rejection. The Chair advised that the application in respect of Work Rights Centre had been included in error, having been withdrawn, and was not recommended for rejection.

RESOLVED – That the Committee reject the grant applications listed in the accompanying schedule, except Work Rights Centre, which was withdrawn.

c) **Withdrawn and Lapsed Applications**

The Committee received a report of the CGO which provided details of three applications which had been withdrawn or had lapsed.

RESOLVED – That the report be noted.

d) **Variations to Grants/Funds Awarded**

The Committee received a report of the CGO which advised Members of a

variation to one grant agreed by the CGO since the last meeting.

RESOLVED – That the report be noted.

e) **London Community Response Fund Grants Approved under Delegated Authority - Wave 4**

The Committee received a report of the CGO advising Members of funds awarded through the London Community Response Fund (LCRF) under delegated authority for Wave 4.

A Member noted that numerous applications to the LCRF were from limited companies and asked whether it would be worthwhile to review CBT's criteria around eligibility in light of this. The CGO advised that this was a broader issue and could be brought back for discussion.

In response to a Member, the CGO advised that organisations ineligible to apply for LCRF grants were able to pair up with more established organisations, and as a result some organisations appeared to be receiving multiple grants.

RESOLVED – That the report be noted.

f) **CBT Communications & Events Attended**

The Committee received a report of the CGO providing Members with an update on the communications work of City Bridge Trust. The Chair drew Members' attention to some of the recent coverage of the CBT, particularly TV coverage, which had been very positive.

RESOLVED – That the report be noted.

12. **REPORT OF ACTION TAKEN**

The Committee received a report of the Town Clerk advising Members of actions taken by the Town Clerk since the last meeting of the Committee, in consultation with the Chair and Deputy Chair, in accordance with Standing Order Nos. 41(b).

RESOLVED – That the report be noted.

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

There were no questions.

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

There was no other business.

15. **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.

| Item No. | Exempt Paragraphs |
|-----------------|--------------------------|
| 19 - 20 | 3 |
| 21 | 3,5 |
| 22 - 23 | - |

16. NON-PUBLIC MINUTES

RESOLVED – That the non-public minutes of the meeting held on 26 November 2020 be agreed as an accurate record.

17. PIPELINE OF PRO-ACTIVE STRATEGIC GRANTS

The Committee received a report of the CGO.

18. BRIDGE HOUSE ESTATES STRATEGIC GOVERNANCE REVIEW - UPDATE FIVE

The Committee received a report of the CGO.

19. QUESTIONS ON MATTERS RELATING TO THE WORK OF THE COMMITTEE

There were no questions.

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

There was no other business.

The meeting ended at 2.55 pm

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. | 28 Jan 2021 | London's Giving | CBT Team / Town Clerk | TBC. | Officers to invite London's Giving to present an update to Committee. |

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Agenda Item 5

| | |
|---|-----------------------------------|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Update report of the Chief Grants Officer and Director of CBT (CGO) | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: CGO | For Decision |
| Report author: CGO | |

Summary

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

- a) Covid 19 support: Core cost conversion and the London Community Response/Fund (LCR/F) Wave 5
- b) Flexible Funders campaign
- c) Responding to the Resilience 2 (RRR2)
- d) Amendment to Business plan
- e) Cornerstone Fund
- f) The Bridge House Estates (BHE) Strategic Governance Review: the proposed BHE Board & potential implications for the CBT Committee.

Recommendations

Members are asked to:

- a) Note the report.
- b) Agree to revise the £500,000 ringfenced for RRR2 to £310,000
- c) Agree to the inclusion of the Impact and Learning outcome in the CBT Business plan.

Main report

Your external speaker today is John Griffiths. John is a Founder Director of Rocket Science which provides research, consultancy and evaluation services to clients across government, business and civil society. In conjunction with Kate Moralee (CBT's Bridging Divides Interim Review Project Manager), John will be providing an overview of the combined work undertaken on the Bridging Divides Interim Review and commissioned research. Following questions, there will then be an opportunity

for further discussion on the Interim Review later in your meeting, informed by a dedicated paper.

Continuing Support & Flexibility in the Covid 19 Context :

1. In the presentation and later paper on the Interim Review our operating context is considered: our work to deliver the Bridging Divides strategy and Philanthropy Strategy have adapted to this context. Whilst the health pandemic shows an improving picture across London with a reducing R rate, mortality rate and increase in vaccination; the socio/economic consequences for many Londoners are stark. The pandemic has further revealed and in some cases exacerbated existing inequalities. During this period we continue to:
 - a) work with & support those organisations in receipt of Bridging Divides funding;
 - b) assess applications in the existing pipeline for the small grants programme (including agreement to increase from 3 to 5 years the maximum duration for a small grant); continuation grants for current funding partners; Stepping Stones funding; strategic initiatives including further funding of the Responding to the Resilience Risk 2, The Cornerstone Fund, Local Motion, London's Giving and Funder Plus support through The Bridge Programme and STRIVE.
 - c) contribute officer time as part of the formal structures underpinning London's response to the pandemic (including consideration of learning to date and of how London's resilience structure could be further improved in the future with deeper connections to the community, voluntary and funder sectors);
 - d) work in collaboration with other funders (see below).

Core cost conversion

3. In June 2020, as part of its Covid-19 response, CBT invited 385 current Bridging Divides grantees to convert a proportion of their current grant funding from specific project funding to core cost funding (e.g. supporting wages, rent and bills) for up to a year to support organisational sustainability and effectiveness both through and hopefully beyond the current pandemic.
4. We asked Renaisi, CBT's learning partner, to interview 12 organisations that accepted the funding conversion, 4 that did not, and 5 of CBT's funding team in order to assess the impact of this approach and to inform CBT's interim review of Bridging Divides and future potential core funding offers.
5. The final report with recommendations is due in May but having completed all interviews, initial findings are that many appreciated the core funding conversion because it gave them flexibility, even if in practice it did not substantially change what the original grant was spent on. There was a mix of ways the funding was used, but often it was spent on adapting services in the context of Covid-19 restrictions and/or developing IT systems. In particular this development of IT systems tended to become a more strategic, long-term focus for organisations as they saw its value in the post-Covid-19 landscape.

6. For those who didn't accept the conversion, most said they wanted to continue doing the same work as previously planned. One funded partner said that with hindsight they should have put more thought into it and accepted the conversion because it could have been useful. Another said they declined because they wanted to have CBT funding attached to a project to secure further funding.
7. Elsewhere in your papers is a proposal to continue this offer as part of the Bridging Divides interim review.

LCRF Wave 5

8. On 11 January, the Town Clerk, in consultation with the Chair and Deputy Chair of CBT Committee, allocated £4m of the 2020-2021 Bridging Divides (BD) budget to Wave 5 of the LCR through the LCRF, and £1m towards aligned expenditure (also from the 2020-2021 BD Budget).
9. Expenditure of the £4m LCRF funds is underway. A donation of £250,000 was also received from Macquarie bank, bringing the total available for Wave 5 expenditure to £4.25m. £990,369 of the aligned funding has been committed, to existing CBT grantees, and the balance of £9,631 (of the original £1m allocated) will remain in the BD budget for expenditure on usual BD activity.

Flexible Funders campaign

10. CBT has signed up to the Flexible Funders campaign run by the Institute of Voluntary Action Research (IVAR) and London Funders (the charity enabling the membership network for funders and investors of London's civil society) in collaboration with a small group of UK foundations and charities. The campaign calls on funders to adopt more open and trusting practices that make life easier for those we fund, in light of the ongoing uncertainty caused by Covid-19. The ambition is to extend the following eight commitments beyond the crisis to become standard practice in the sector:
 - a) Don't waste time – funders will be open, transparent and clear about all of their priorities, requirements and exclusions.
 - b) Ask relevant questions – funders will test their application forms to ensure clarity, relevance and avoid repetition, only collecting information that genuinely informs a funding decision.
 - c) Accept risk – funders will clearly explain how risk is assessed and be realistic about how much assurance applicants can provide.
 - d) Act with urgency – funders will aim to make decisions as quickly as possible by publishing and sticking to timeframes to ensure they work at a pace that meets the needs of applicants.
 - e) Be open – funders will provide feedback, including reasons for rejections. They will analyse and share relevant data, including publishing success rates.
 - f) Enable flexibility – funders will aim to give unrestricted funding; where they cannot (or are a specialist funder), they will ensure their funding is as flexible as possible.
 - g) Communicate with purpose – a funder's contact is positive and purposeful. They will be realistic about their time commitments.

- h) Be proportionate – funders will ensure that their formal reporting requirements are well understood, proportionate and meaningful.
11. You can see who else has signed up and read more about these eight commitments on IVAR’s website: www.ivar.org.uk/flexible-funders . CBT’s commitments are here: [IVAR call to action CBT template](#) and we are creating an action plan to keep us on track with our new commitments.

Responding to the Resilience 2 (RRR2)

12. At your Committee meeting in November 2020, you agreed to support the development and delivery of Responding to the Resilience Risk 2 (RRR2) up to an estimated cost of £500,000, which was ring-fenced from CBT’s central risk budget.
13. RRR2 will test the impact of a coaching-based resilience intervention on frontline workers in homelessness charities in London. The RRR2 resilience intervention has been shaped by learning from your earlier initiative, Responding to the Resilience Risk, an evaluation of which was published in September 2020. RRR2 aims to develop and test a model for supporting frontline workers, and share learning widely, influencing the practice of other funders working in London.
14. Your agreement to this arrangement was in recognition of a pending funding application being prepared by your officer to The Oak Foundation, the outcome of which would adjust the figure required from CBT (see below). This agreement also recognised that the RRR2 programme was still in development and therefore some costs could only be estimated at that point.
15. As the RRR2 programme has progressed, whilst the overall estimated project cost remains at £500,000, please note the following updates to the expenditure budget that was presented to you in November 2020:
- a) The estimated costs of delivering the coaching activities for the RRR2 programme on a cost recovery basis has reduced from £85,000 to £77,620. However, this excludes any potential costs of the Guildhall School of Music and Drama (GSMD) staff engaging with the evaluation, which cannot be costed until the Evaluator is appointed.
 - b) It is anticipated that Coaching staff from GSMD will contribute to the evaluation and that further costs will be incurred to cover officer time for this purpose.
 - c) The fee offered for the RRR2 Coordinator contract was increased from £15,000 to £18,000 on the advice of your procurement team.
 - d) Finally, costs incurred for legal support at the point of writing were £3,357, which is lower than budgeted.
 - e) It is anticipated that further legal costs will be incurred as the programme develops.
 - f) The variables to the project’s expenditure can easily be absorbed by the contingency that was built into the budget.
16. The application to Oak Foundation was successful, which means that CBT will receive a grant of £190,000 towards the costs of the RRR2 programme, reducing

the sum required from CBT from £500,000 to £310,000. In light of this, your officer presents the following recommendation for consideration:

Recommendation:

Members are asked to agree to revise the £500,000 ringfenced for RRR2 to a sum of £310,000.

17. A list of actual and anticipated RRR2 expenditure and a revised budget, incorporating the further GSMD staffing and legal costs mentioned above, are presented in the appendix to the CGO report.
18. Your officer can also report that the tender for the RRR2 Coordinator has now closed and your officer hopes to be in a position to contract an organisation to deliver the RRR2 Coordination role by the date of your meeting in March 2021. The tender for the RRR2 Evaluation process is live and will close in early April. Your officer is working closely with your Principal Lawyer (Contracts) to create a bespoke MOU to outline the relationship between CBT and the GSMD for the RRR2 programme. Finally, your officer has written back unused funds of £43,361 from the Responding to the Resilience Risk programme, which culminated in the autumn of 2020. These funds will be returned to your grants budget.

Amendment to Business Plan

19. Following the presentation of the CBT Business plan to this committee in November 2020, we propose to add an additional workstream linked to Impact and Learning; as follows:
 - a) To embed learning across all of CBT and use evidence and learning to influence good practice more widely by implementing the impact and learning strategy.
20. This outcome was omitted in error from the November draft. It builds on the previous business plan and reflects CBT's ongoing commitment to be anchored in lessons learnt from its funded organisations, stakeholders and own practice.

Recommendation:

Members are asked to agree to the inclusion of the Impact and Learning outcome in the CBT Business Plan.

Cornerstone Fund

21. You may recall that the first round of the Cornerstone Fund, originally an additional 'pot' of £3m from the anniversary funding allocated in 2015, was launched in April 2018, alongside the Bridging Divides funding priorities. This additional funding was approved to support the strategic development of civil society infrastructure support¹ in London.

¹ 'Civil society infrastructure support' means any organisation that provides services to help strengthen civil society organisations, such as councils for voluntary services; equalities support organisations, such as racial equality membership bodies, or those providing specialist support, such as digital or campaigning skills.

22. It was always the ambition of the Cornerstone Fund that other funders would collaborate with us on its development and we have worked with the National Lottery Community Fund, Trust for London, GLA, John Lyons Charity, Mercers Company, London Funders and London Councils throughout Round 1.
23. A Learning Partner, Collaborate CIC, was appointed following an open tendering process which ran a series of workshops throughout 2018 – 2020 for the lead funded organisations and the aligned funders. The executive summary of their report on Round 1 can be found [here](#)
24. Round 2 of the Cornerstone Fund launched on 8th February 2021, following a consultation meeting held on 5th November 2020, facilitated by Collaborate.
25. All of the funders involved in Round 1 have committed to working with us on Round 2. Broadly, Round 2, as in the case of Round 1, will focus on civil society support organisations which are taking collaborative/partnership approaches to bring about systemic change in how they work with those they support.
26. The closing date for Stage 1 applications is 22nd March 2021. A virtual workshop for potential applicants took place on 5th March attended by approximately 60 people. The Funder Panel will meet on 16th April 2021 to consider the Stage 1 applications and then to make recommendations to the CBT Committee for decision by delegated authority.

The Bridge House Estates (BHE) Strategic Governance Review: The Proposed BHE Board & potential implications for CBT Committee

27. Members will recall that in 2018 the BHE Strategic Governance Review was initiated to assess how the governance of BHE could be enhanced, to ultimately increase the reach and impact of the charity's activities and to model good practice. Having regard to this, a key workstream of the Review has been to review the administration of the charity under the City Corporation's own corporate governance framework. With the initiation of a separate Corporate Governance Review for the City Corporation itself in 2020, led by Lord Lisvane, it was deemed appropriate to progress any potential changes to BHE's governance and administration by the City Corporation as Trustee in line with the Governance Review.
28. Members have been provided with regular bi-annual updates reports on the progress of the BHE Governance Review, with the latest fifth updated report received in January 2021. The Chairs and Deputy Chairs of key committees discharging responsibility for BHE have also been regularly engaged throughout the Review. The fifth update report highlighted the progress made in making changes to BHE's governance and outlined the proposal to create a dedicated BHE Committee of the Court, supported by its own-sub-committees, and set out the next steps for approval of this recommendation.
29. In March 2021, the Court of Common Council, acting for the City Corporation as Trustee of BHE, approved the creation of a dedicated committee of the Court of Common Council to be responsible for the administration of BHE under the

oversight of the Court from April 2021. A single committee was recommended to support regulatory best practice and ensure that, by the implementation of a governance and operational framework providing for cohesive oversight of this large and complex charity in this way, the City Corporation as Trustee will better discharge its duties to administer the charity effectively, solely in the charity's best interests and in furtherance of BHE's charitable objects

30. The Court agreed to constitute a committee to be named the "Bridge House Estates Board" to have responsibility for dealing with the day-to-day management and administration of the charity's business and financial affairs, management of risk, and exercising the powers of the City Corporation as Trustee of BHE on behalf of the Court, and including but not limited to:

- a) Considering matters of policy and strategic importance to BHE, and making recommendations to the Court of Common Council in settling the charity's overarching policies;
- b) The review and co-ordination of the governance of BHE for the City Corporation as Trustee, reporting as necessary to the Court of Common Council;
- c) Appointing such sub-committees as are considered necessary for the most effective discharge of BHE functions;
- d) The corporate control, management, maintenance and repair of the five Thames bridges;
- e) The management of the visitor and events elements relating to Tower Bridge; and,
- f) The application of funds for the ancillary object in accordance with the policy set.

31. The creation of a BHE Board will result in changes to existing Terms of Reference of committees which currently discharge BHE functions. Members will be further engaged in implementing the corporate governance arrangements to be adopted upon creation of the Board, particularly in considering the governance arrangements to be adopted to support collaboration and co-operation across the City Corporation's functions having regard to existing governance structures. It is also specifically recommended that any new BHE Board consider constituting a sub-committee to focus on the charity's grant funding programme, including to make provision for the appointment of persons serving on the existing CBT Committee to help ensure continuity in this part of the charity's business.

32. Furthermore, it is proposed that the BHE Board considers whether any sub-committees it establishes could draw upon the expertise in other Committees for example by appointing members of other Court Committees whose insights and experience may be helpful. It would also be open to the BHE Board to appoint further external co-opted Members to its sub-committees.

33. The proposed Terms of Reference for the new BHE Board will now be presented to the Court of Common Council in April 2021 for approval in constituting all the Court's Committees in 2021/22 in the usual way. If approved, it is then anticipated that the first meeting of the BHE Board will be held in May 2021, at which point the Chair and Deputy Chair of the Board will be elected. It is also

proposed that the BHE Board consider at its first meeting which sub-committees it may wish to constitute (with the recommendation to establish a funding sub-committee, as outlined above).

34. Subject to the formal constitution of the BHE Board by Court in April 2021, the proposed changes mean that this is most likely to be the last time that this CBT Committee will meet in its current form, as it is likely to be dissolved as a Grand Committee by the Court in April 2021 as a result of constituting the BHE Board. Your CBT Officers would like to take this opportunity to offer their gratitude and thanks for your guidance and support. This Committee can feel especially proud of supporting innovation and progressive funding practices: including our cutting-edge work with disabled people, and a commitment to the social model of disability, taking a leading role in community response to major incidents in London, (COVID, the London Bombings, Grenfell), and pioneering a collaborative response to knife crime (the Fear and Fashion project). Your commitment to championing civil society infrastructure support including the Cornerstone Fund has transformed the sector and continues to influence other Foundations' working practices.

35. In this past year, where so many of London's marginalised communities faced even more challenges, you supported the CBT Team's proposals as we adapted to meet their ever-changing needs and coordinated the London Community Response Fund. We look forward to working with many of you again as we continue our work to reduce inequality and grow stronger communities in London.

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Appendix 1:

Revised Budget for Responding to the Resilience Risk 2 initiative

| RRR2 Expenditure | | | | | |
|------------------|----------------------|---------------------------------|----------------------|---------------------|----------------------|
| November budget | | Actual/anticipated (March 2021) | | Revised RRR2 budget | |
| £300,000 | 12 participating gps | £300,000 | 12 participating gps | £300,000 | 12 participating gps |
| £85,000 | Coaching | £77,620 | Coaching | £83,620 | Coaching |
| £60,000 | Evaluation | £60,000 | Evaluation | £60,000 | Evaluation |
| £15,000 | Coordination | £18,000 | Coordination | £18,000 | Coordination |
| £15,000 | Legal support | £3,357 | Legal support | £6,000 | Legal support |
| £475,000 | SUBTOTAL | £458,977 | SUBTOTAL | £467,620 | SUBTOTAL |
| £25,000 | Contingency (5%) | £41,023 | Contingency (8%) | £32,380 | Contingency (6.5%) |
| £500,000 | TOTAL EXPENDITURE | £500,000 | TOTAL EXPENDITURE | £500,000 | TOTAL EXPENDITURE |
| | | | | | |
| RRR2 Income | | | | | |
| November budget | | Actual/anticipated (March 2021) | | Revised RRR2 budget | |
| £500,000 | CBT ringfenced | £310,000 | CBT | £310,000 | CBT |
| | | £190,000 | Oak Foundation | £190,000 | Oak Foundation |
| £500,000 | TOTAL INCOME | £500,000 | TOTAL INCOME | £500,000 | TOTAL INCOME |

Agenda Item 6

| | |
|--|--------------------------------|
| Committee(s): City Bridge Trust Committee – for decision | Dated: 25 March 2021 |
| Policy and Resources Committee - for decision | 8 April 2021 |
| Subject: Joint Philanthropy Strategy Implementation – Update and Future Plans | Public |
| Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly (both for the City Corporation itself and as Trustee for Bridge House Estates(1035628) insofar as the outcomes are considered to be in the best interests of the charity to support in taking these decisions)? | Outcomes 3 & 5 |
| Which outcomes in the Bridge House Estates Strategy does this proposal aim to impact directly | See para 20 below |
| Does this proposal require extra revenue and/or capital spending? | No |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain’s Department? | N/A |
| Report of: David Farnsworth, Chief Grants Officer | For Decision |
| Report author: Fiona Rawes, Philanthropy Director, Town Clerk’s Department | |

Summary

The Report provides an update on the implementation of the Joint Philanthropy Strategy adopted in June 2018 for the City of London Corporation (CoLC) itself, and as Trustee of Bridge House Estates (Registered Charity No. 1035628) in furthering the charity’s ancillary object. The Joint Strategy was developed in recognition of the fact that the CoLC undertakes significant philanthropy, whether in its own right or as Trustee of Bridge House Estates (BHE) and that a more strategic approach was required to analyse, cohere and communicate this philanthropy to maximise its impact, as well as ensuring that the CoLC was contributing to, and raising awareness of, high impact and/or high value philanthropic practice more broadly.

The Joint Strategy encompasses the giving of time, money, assets and skills by individuals, businesses, trusts and foundations and aims, through the work of the CoLC and BHE in conjunction with others, to increase the impact and value of philanthropy.

Following the development and approval of the Joint Strategy, an implementation plan was agreed by City Bridge Trust (CBT) and Policy and Resources (P&R) Committees in November 2018/February 2019 respectively. The context for the implementation of that plan has been highly challenging for obvious reasons: the public-health crisis caused by Covid-19 has become a socio-economic crisis of a magnitude which this country has not experienced since the Second World War.

Inequalities which existed prior to the pandemic have been powerfully illuminated as a result of it. Charities, many of which are focused on tackling these inequalities and their underlying causes, have faced a perfect storm of rising demand combined with significantly depleted resources. And all of this in a context where rapid digital transformation of both back office and frontline delivery has been essential but, in many cases, very challenging owing to inadequate resourcing.

Within this context, it would be easy to assume that the public would baton down the hatches and deprioritise philanthropy. Analysis¹, however, suggests that giving in 2020 remains comparable to previous years, although restricted in-person fundraising has inevitably take its toll on some causes. Institutional funders, including CBT, also rose to the challenge, and fast-tracked improvements in their collective funding practices which may otherwise have taken many years to achieve.

The well documented upsurge in offers to volunteer - whether at national, regional or hyper-local level - threatened to overwhelm the system's capacity, perhaps reflected in the fact that the level of volunteering went down- whether in terms of the % of volunteers and the number of volunteering hours spent². However this analysis does not capture the emergence of significant hyper-local, *informal* volunteering at street or ward level which was one of the most heartening developments witnessed in the early months of the pandemic.

This paper, which sets out implementation proposals for the second phase of the 2018 – 2023 Joint Philanthropy Strategy, therefore comes to you at a point when there is very significant need in the charitable sector, but philanthropic energy is high and there are opportunities to capitalise on the philanthropic innovations wrought through the pandemic. The paper encompasses recommendations, set out in **Appendix 5**, to:

- a) further refine and increase the impact of the CoLC's own philanthropy, whether in its own capacity or as Trustee of BHE;
- b) support other organisations who are playing a leading role in increasing the scale and impact of philanthropy more broadly, with a particular focus on cross sectoral collaboration where possible; and
- c) raise awareness of excellence in philanthropic practice, drawing on our networks, assets and convening power to support this.

Recommendations

The CBT Committee for the CoLC as Trustee of BHE (Charity Registration No. 1035628) in the best interests of the Charity, and the P&R Committee acting both for the CoLC for itself, and separately and solely in the best interests of BHE as charity Trustee, are each recommended to:

1. Note the update on the implementation of the Joint Philanthropy Strategy to-date; and

¹ <https://www.cafonline.org/about-us/publications/2020-publications/uk-giving-2020>

² <https://www.gov.uk/government/publications/community-life-covid-19-re-contact-survey-2020-main-report/3-formal-volunteering-community-life-recontact-survey-2020>

2. CBT Committee to agree the proposed 2021 – 2023 Implementation Plan set out in Appendix 5 for approval by the Policy and Resources Committee.
3. The P&R Committee to agree to adopt the proposed 2021 – 2023 Implementation Plan, set out in Appendix 5.

Main Report

Background

1. In June 2018, the Court of Common Council approved a Joint Philanthropy Strategy for 2018 – 2023. The Strategy was prepared jointly for the CoLC in its general corporate capacity, and as Trustee of BHE (Charity Registration No. 1035628) in furthering the charity’s ancillary object.³ The Joint Strategy encompasses the giving of time, money, assets and skills by individuals, businesses, trusts and foundations and aims, through the work of the CoLC in conjunction with others, to increase the impact, value and profile of philanthropy.
2. Unless otherwise stated, all references in this Report and Appendices to the CoLC are to the CoLC acting both in its general corporate capacity and as Trustee of BHE. The principal activities of BHE in furthering the charity’s ancillary object in support of the Joint Strategy are being delivered through the charity’s funding arm, CBT.
3. In October 2020, the Court of Common Council approved an overarching Strategy for BHE, *Bridging London 2020 – 2045*. This strategy provides a framework for all of the charity’s activities and outlines the collective impact it seeks to have through its primary and ancillary objects. The Joint Philanthropy Strategy for BHE sits under that overarching Strategy and provides more detail on philanthropic practice and objectives for BHE.
4. The Joint Philanthropy Strategy has 3 outcomes:
 - 4.1. High impact philanthropy is role modelled by the CoLC and CBT contributing, in particular, to a reduction in inequality and/or an increase in social mobility.
 - 4.2. Higher impact and/or higher value philanthropy is generated from others as a result of the CoLC and CBTs’ support for philanthropic infrastructure.
 - 4.3. Key audiences are better equipped to generate higher impact and/or higher value philanthropy as a result of the CoLC and CBTs’ awareness-raising activities about it.

³ The primary object of BHE is to maintain and support five bridges crossing the River Thames - London Bridge, Blackfriars Bridge, Southwark Bridge, Tower Bridge and Millennium Bridge. A cy-près charity scheme of 1995 permits income surplus to that required for the bridges to be used for broader, and more general, charitable purposes within Greater London (“the ancillary object”). The income surplus is applied in accordance with a policy agreed by the Court of Common Council and notified to the Charity Commission, following consultation with external and internal stakeholders, being the *Bridging Divides 2018-2023* funding strategy.

5. A phase 1 implementation plan for the period spanning April 2019 – March 2020 was endorsed by the CBT Committee for BHE in November 2018 and approved by the P&R Committee for both BHE and for itself in February 2019. The plan focused on building a stronger understanding of the CoLC's philanthropic practice, focus and impact, and also laid the foundations for providing greater support for, and awareness-raising of philanthropy externally. Officers planned to use the resulting insights to shape a phase 2 implementation plan for April 2020 – March 2023.
6. The Philanthropy Director, CBT Chief Grants Officer and many other Officers across the CoLC have been intensively involved at pan-London level in the official strategic response to the Covid-19 health pandemic since March 2020. In particular the Philanthropy Director has co-chaired the Funder, Community and Voluntary Sector 'cell' which forms part of the emergency response architecture and is currently co-chairing the 'Building Strong Communities' Mission which is one of nine workstreams underpinning the London Recovery Plan led by the GLA and London Councils.
7. This Covid response work, described in more detail in **Appendix 1**, has directly supported many of the aspirations of all three pillars of the Philanthropy Strategy as well as reflecting CBT's adaptive, progressive and collaborative values, and the CoLC's aspirations for pace, relevance and reliability. High impact giving of time, money and skills has been role-modelled at a time of critical need, as has the provision, by the CoLC and CBT, of significant practical and financial support, expertise and awareness-raising around pioneering new collaborations focused on funding, volunteering and gifts in kind in London.
8. However, these intensive efforts have meant that some aspects of the original implementation plan have needed to be deprioritised and others delayed. This pause in implementation has to some extent been propitious insofar as it enables the implementation efforts to better align with, and support the delivery of, the recommendations currently being formulated and proposed for the interim review of BHE's funding strategy, *Bridging Divides 2018-2023* and the BHE Strategic Governance Review.

Current Position

9. This paper sets out the progress and learning amassed from March 2019 to-date, and the proposed implementation plan for the remaining 2 years of the current Joint Philanthropy Strategy (April 2021 – March 2023). The 3 framing pillars of Role Modelling, Supporting and Raising Awareness of high impact philanthropy deployed in the first phase of the Joint Strategy's implementation continue to provide a useful strategic framework and will therefore also be deployed for this next phase of implementation.
10. **Pillar 1: High impact philanthropy is role modelled by the CoLC and CBT contributing, in particular, to a reduction in inequality and/or an increase in social mobility.** This pillar looks at internal practice within the CoLC in its different guises – whether in relation to its own giving in its corporate capacity, or that undertaken through BHE as Trustee.

11. Within this pillar, the implementation priorities for 2019-2020 were to:
 - a) build a more comprehensive picture of the CoLC's philanthropy;
 - b) ensure the foundations were in place to better analyse its impact; and
 - c) ensure that the CoLC's expertise, assets, networks were fully harnessed in support of CBT's *Bridging Divides* strategy.
12. The outputs and learning from this pillar are set out in **Appendix 2**. Officers have made encouraging progress in building a more comprehensive picture of the CoLC's philanthropy, whether in its own right or as trustee of BHE. In 2019 – 20, this amounted to more than £54.9m of funding and benefits-in-kind comprised of £30.4m from CBT and £24.5m from the CoLC. There is also greater consistency of practice between different giving focus areas across the organisation thanks, in no small part, to the efforts of the Central Grants Unit (CGU) which is going from strength to strength. Officers are also building a more concrete picture of the funding leverage achieved through CoLC philanthropy, although there is still more to do here.
13. More broadly under this Role Modelling pillar, the CBT has played a leading role in a pioneering new collaboration of over 65 institutional, statutory and corporate funders who came together to maximise their collective impact in responding to the pandemic. The resulting 'London Community Response' galvanised over £42m of funding from across these funders and enabled over 1,500 grants to be made for the benefit of Londoners. Significant innovations in funding practice resulted, with the associated funders pooling expertise and streamlining processes to accelerate impact. More detail on the London Community Response is set out in **Appendix 1** and the model has been widely lauded as an exemplar of progressive cross-sectoral funding collaboration. Steps will be taken to capitalise on the innovations, embed them more deeply in the CoLC's own philanthropic practice – whether for itself or in furtherance of BHE's ancillary object – and use them as a foundation for further cross sectoral collaborations with the CoLC's stakeholders in this next phase.
14. There have also been notable improvements to monitoring and evaluation practice across the organisation to ensure that the CoLC's philanthropy is as impactful as possible whilst, again, recognising that further progress is required. Good progress has also been made in harnessing the CoLC's expertise, assets, networks in support of CBT's *Bridging Divides* strategy not least during the pandemic, however efforts will be refocused around this in the next phase recognising that it is currently an under-exploited area. Associated recommendations for this first Role Modelling pillar in 2021 – 2023 are set out in **Appendix 5**.
15. Pillar 2 of the strategy is more externally focused; **higher impact and/or higher value philanthropy is generated from others as a result of the CoLC and CBTs' support for philanthropic infrastructure organisations.**
16. The 2019-20 implementation plan prioritised the following actions:

- a) extending the funding criteria within CBT's *Bridging Divides* strategy to include 'cause-agnostic' organisations whose *primary* focus was increasing the value/impact of gifts of time/money/assets or skills;
- b) focusing on driving greater on and offline collaboration to unlock higher impact and higher value philanthropy; and
- c) deepening understanding of what the CoLC's philanthropy has leveraged for the causes it supports.

17. The outputs and learning from this pillar are set out in **Appendix 3**. A range of thoughtful funding partnerships and broader collaborations have been explored and developed as appropriate to enrich the quality and scale of philanthropic activity in London and beyond. It has been particularly encouraging to see how foundations laid through the CoLC's funding partnerships established prior to the pandemic have come into their own in the last year, with tangible impact on funding, volunteering and broader philanthropic practice for the benefit of London and beyond. The aspirations for 2021 – 2023 are set out **Appendix 5**.

18. This final pillar ("**Key audiences are better equipped to generate higher impact and/or higher value philanthropy as a result of the CoLC and CBTs' awareness-raising activities about it**") is also externally focused. Through convening, research and thought leadership, it aims to raise awareness of what drives effective philanthropy.

19. Work under this pillar, described in **Appendix 4**, has been, of necessity, emergent whilst the CoLC has recruited and onboarded the Head of Charitable Communications, and CBT has developed its Learning and Impact team. However there are encouraging green shoots described in more detail in **Appendix 4** which provide exciting foundations for the phase 2 recommendations set out in **Appendix 5**.

Corporate & Strategic Implications

Strategic implications

20. For the CoLC in its corporate capacity, the recommendations in the Report support outcomes 3 & 5 of the Corporate Plan, and align with and support the recommendations of the CoLC's Social Mobility and Responsible Business Strategies. These objectives are also considered to be aligned to the strategic objectives of BHE, and in the charity's best interests to support. Specific BHE Strategies which are supported by the recommendations in the Report are the charity's overarching strategy, *Bridging London 2020 - 2045* and its charitable funding strategy *Bridging Divides*. Specifically, it supports BHE's aims of being catalytic and impact-driven in order to become a charity that is a world-class charitable funder and responsible leader.

Financial implications

21. Any proposed initiatives for the 2021-22 financial year are costed and included in the relevant approved Budgets.

Resource implications

22. All resourcing needs are costed into the relevant budgets for 2021-22. It is not anticipated that there will be a material uplift in resourcing requirements in 2022 – 2023.

Legal implications

23. As Trustee for BHE, the CoLC must continue to independently consider and ensure that the adoption of the Joint Strategy and its implementation in furthering the charity's ancillary object remains in the charity's best interests having regard to the charity's primary object (which takes precedence over the ancillary object) and the charity's overarching strategy under which the Joint Philanthropy Strategy sits; and further that any conflicts of interest arising in the CoLC acting for itself, or otherwise as Trustee of BHE, are managed.

Risk implications

24. Appropriate skills, insights and networks are currently being developed across the relevant CoLC Teams to ensure that any risks attaching to the CoLC's philanthropic activity under the Joint Strategy are identified and the appropriate mitigations put in place. In this way the CoLC can ensure that its focus on role modelling high impact philanthropy remains an integral part of the implementation of the Joint Strategy.

Equalities implications –

25. The CoLC's Public Sector Equality Duty (PSED) applies to the exercise of the CoLC's local authority functions only. Nonetheless, pillar 1 of the Joint Philanthropy Strategy has an explicit focus on reducing inequality, and many of the initiatives which are supported or amplified under pillars 2 and 3 are also focused on this. The implementation of the Joint Strategy is therefore expected to positively address inequality alongside the CoLC's separate discharge of the PSED.

Climate implications:

26. Officers are engaging with the relevant teams within the CoLC to ensure that the philanthropic activities which the CoLC is role modelling, supporting or amplifying

Security implications:

27. None

Conclusion

As we enter this next two year phase, when resources throughout the Charitable Sector are depleted, but BHEs' own philanthropic contribution, through the activities of CBT, is likely to be significantly higher, it is even more incumbent on the CoLC, both for itself and as Trustee of BHE, to support the aspirations of its Joint Philanthropy Strategy and ensure that it is role-modelling excellence in philanthropy, and playing a highly constructive and influential role in supporting and amplifying excellent philanthropy more broadly. The recommended outputs for 2021-2023 are set out in Appendix 5 accordingly, and commended to your respective Committees for approval.

Appendices

- **Appendix 1:** How the CoLC's engagement in the Pan-London Covid response, for itself and as Trustee of Bridge House Estates, has supported the aspirations of its Joint Philanthropy Strategy
- **Appendix 2:** Learning and outputs from the CoLC's philanthropic role modelling initiatives, for itself and as Trustee of BHE
- **Appendix 3:** Learning and outputs from philanthropic funding partnerships by the CoLC for itself and as Trustee of BHE
- **Appendix 4:** Learning and outputs from initiatives to raise awareness of high impact and/or high value philanthropy
- **Appendix 5:** Recommended Joint Philanthropy Strategy Implementation Plan 2021-2023

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Appendix 1: How the CoLC's engagement (for itself and as Trustee of BHE) in the Pan-London Covid Response has supported the aspirations of its Joint Philanthropy Strategy

1. The Philanthropy Director, CBT's Chief Grants Officer and many other Officers across the CoLC have been intensively involved at pan-London level in the official strategic response to the Covid-19 health pandemic since March 2020.
2. This work has directly supported many of the aspirations of all three pillars of the Philanthropy Strategy. High impact giving of time, money and skills has been role-modelled at a time of critical need, as has the provision, by the CoLC and CBT, of significant practical and financial support, expertise and awareness-raising around pioneering new collaborations focused on funding, volunteering and benefits-in-kind in London.
3. In particular, as part of the wider London Community Response ("LCR"), a collaboration comprising c.67 funders led by London Funders in response to Covid 19, the CoLC established the London Community Response Fund ('LCRF') as a restricted fund within Bridge House Estate's ancillary object. Some funders, including the National Lottery Community Fund, GLA, Paul Hamlyn Foundation, Bloomberg and Macquarie, have chosen to donate funds directly to LCRF (rather than distribute those funds directly themselves through the LCR framework). To date £16.7m has been received in external donations to LCRF whilst BHE, through its CBT funding budget, has committed £15.250m to the LCRF, and separately £990,369 in aligned funding. More than £27m has been distributed via 1,500 grants awarded through the LCRF since March 2020, contributing to a total of over £42m distributed through the wider LCR.
4. Particularly pioneering features of this LCR collaboration of cross-sectoral funders from the Independent, Corporate and Statutory sectors include:
 - 4.1 a common application portal hosted by London Funders which has enabled community groups to reach multiple funders through a single application;
 - 4.2 engagement of key equity partners, and explicit prioritisation or ringfencing of funding for these groups, to ensure that communities who have been disproportionately adversely affected by the pandemic have been financially supported;
 - 4.3 a nimble and progressive approach to pooling resources, expertise and process improvements across its funders to ensure the most streamlined and efficient experience for organisations applying for funds.
 - 4.4 the 'cover', through collaboration, for individual funders to reappraise their risk appetite and pilot new, more progressive approaches alongside their peers as well as to extend the reach of all funders by exposing them to new civil society organisations that they had not funded before.
5. More broadly, beyond CBT's engagement with the LCR, CoLC officers have worked assiduously with partners from a range of sectors to ensure nimble and impactful responses to Covid-19-related issues, such as food insecurity, domestic violence, homelessness and bereavement. Refinements in harnessing voluntary and in-kind support have resulted. These include contributing to work scoping the possibility of a national volunteering passport to reduce the

bureaucracy around DBS checks, fast-tracking volunteering engagement as a result, and closer engagement with Business in the Community around a pooled national in-kind brokerage service for emergencies

6. All of this has served to enrich and enhance the CoLC's own philanthropic practice for the longer term as well as deepening its relationships with key organisations and creating opportunities to shape new strategic partnerships.

Appendix 2 : Outputs and learning from pillar 1 of the Philanthropy Strategy

(“High impact philanthropy is role modelled by the CoLC and CBT contributing, in particular, to a reduction in inequality and/or an increase in social mobility”).

1. Officers have undertaken a comprehensive review of philanthropy across the CoLC, including that of City Fund, City’s Cash, the Sundry Trusts and Open Spaces charities and BHE through its funding arm, CBT. The review considered over 1,000 underpinning financial and in-kind transactions p.a.
2. Based on the most up to date figures the CBT acting in all its legal capacities collectively gave **£54.9m** in 2019/20, broken down as follows:

| Type of philanthropy | Amount given in 2019-20 (£m) |
|-----------------------|------------------------------|
| CBT Funding | 30.4 |
| CoLC Funding | 22.5 |
| CoLC Benefits In-Kind | 2.0 |
| Total | 54.9 |

3. This exercise revealed that it is challenging to generate an accurate figure of exactly how much the CoLC gives, whether in cash or in kind. In some cases there are grey areas, for example where it could be argued that the spend to charitable recipients is enabling the CoLC to discharge its statutory duties, but the level of spend is over and above what might be expected of a local authority in fulfilling its statutory obligations. There are also some areas where there is potentially a quite significant underestimate of the CoLC’s philanthropy e.g. in relation to its in-kind donations/support.
4. However, it can now be stated with some confidence that the CoLC, including that of City Fund, City’s Cash, the Sundry Trusts and Open Spaces charities and BHE through its funding arm, City Bridge Trust (CBT) currently give a total of at least £54m. of funding, time, assets and skills p.a.
5. The focus of the CoLC’s philanthropic spend is broad-ranging with at least 63% of the 54.9m total reflecting the priorities of the Joint Philanthropy Strategy i.e. that the philanthropy of the CoLC acting in all its legal capacities contributes, in particular, to an increase in social mobility and a reduction in inequality.
6. The governance of the CoLC’s philanthropy is dispersed across both the Court of Aldermen and the Court of Common Council (and its various committees), leading to variable levels of scrutiny of impact, efficiency and alignment to corporate objectives. Considerable work has therefore been undertaken to refine and align grant-making practice and its associated oversight, not least through the expanding remit of the Central Grants Unit (CGU) which was established in October 2016 to manage the effectiveness of the CoLC’s grant-making by facilitating consistency of approach and harmonising service standards across the CoLC’s grant-making activities (in its various capacities, including as trustee of a number of charities).
7. The CGU now has oversight of the Central Grants Programme (CGP) (in part funded from City’s Cash and from individual charities in accordance with a number of strategic themes set by P&R Committee in March 2016), the £6.3m CIL Neighbourhood Fund, the grant making of a number of other City Corporate related charities outside the CGP, and benefits-in-kind reporting. It also provides

advice on donations made through the International Disaster Fund, held by the Finance Committee. A key role of the CGU, in addition to supporting individual grant programmes, is also to provide advice across the whole of the CoLC's activities and model good practice. This strategic role is a significant element of the current work undertaken by the CGU with the unit providing either direct oversight of, or more informal advice and guidance around, 79% of the £24.5m of funding or benefits-in-kind provided by the CoLC.

8. This work has been enhanced, since September 2019, through the current Corporate Charities Review which is intended to further rationalise the portfolio of charities for which the CoLC is corporate Trustee (or otherwise appoints the majority or all of the individual trustees). This is being achieved through closures and mergers, by making other administrative changes to the charities' governing documents to enhance the charities' effectiveness, and to model best practice in implementing governance and management arrangements for the remaining portfolio. Progress continues to be made within the Review but further work is planned over the next 12-months to help ensure the objectives of the Review are fully met.
9. Recognising the dispersed governance relating to the CoLC's philanthropy noted in paragraph 6 above, officers have undertaken the following steps to build a better understanding of its impact:
 - 9.1 An impact and learning team has been established in CBT supported by an independent learning partner to enable a stronger understanding of the impact of BHE's philanthropic and social investment practice. This team liaises closely with the CGU team to ensure cross-fertilisation of practice between their respective domains.
 - 9.2 The piloting and mainstreaming of the CGU has enabled more consistent officer-level oversight and support for grant making committees across the CoLC, including cohesive oversight and scrutiny of the impact of funding decisions. Learning and best practice is applied consistently. Participation in the Charities Review is further enhancing outcomes for both the CGU and the Review - for example the risk management framework across all the sundry trusts is being reviewed and updated to align both with the CoLC's own systems and charity best practice; a joined up approach to charitable activity is implemented (refer para 9.4 below).
 - 9.3 The CGU has implemented a more robust policy and assessment of the value and focus of the Benefits in Kind (BIKs) reporting made across CoLC. This information is analysed annually and presented to Members. More work is required to understand the impact that BIKs have, and to continue to better capture BIKs.
 - 9.4 The Corporate Charities Review aims to support a more streamlined and consistent approach to the giving undertaken by the numerous charities for which the CoLC is the Trustee (or appoints the individual trustees). This includes reviewing the governance, management and administration of such charities to ensure that their activities are as impactful as possible, and any strategic connections with the CoLC and corporate other charities, including BHE, are best utilised.

10. However more work is needed to build a community of practice between and beyond these areas to ensure the CoLC's giving, in the round, is as impactful as possible. The recommendations for the 2021 – 2023 implementation period (**Appendix 3**) reflect this.
11. More broadly, beyond these efforts to build a more accurate understanding of the CoLC's giving practice and its impact, officers have undertaken various measures to better harness the CoLC's expertise, assets, networks and those of its associated charities including BHE's *Bridging London* overarching strategy and its *Bridging Divides* funding strategy. In particular:
 - 11.1 the CoLC's Employee Volunteering Programme has been revised and relaunched from November 2020 to include a much more explicit link between employee volunteers and volunteering opportunities hosted by CBT funding partners;
 - 11.2 extensive work has been undertaken through the BHE Strategic Governance Review, to assess how the governance of BHE could be enhanced, to ultimately increase the reach and impact of the charity's activities and to model good practice in the charity's management and administration;
 - 11.3 initial mapping of the CoLC's Skills and Assets has been undertaken with a view to better linking them into BHE's *Bridging Divides* 'total assets' priorities, although progress has been constrained in owing, in particular, to the demands of the pan-London Covid response.
12. With the above in mind, proposed Role Modelling recommendations for 2021 – 2023 are set out in **Appendix 5**.

Appendix 3:

Outputs and learning from pillar 2 of the Philanthropy Strategy (“Higher impact and/or higher value philanthropy is generated from others as a result of the CoLC and CBTs’ support for philanthropic infrastructure organisations”).

1. CBT has supported various strategic initiatives focused on increasing the impact and scale of philanthropy, and is increasing its learning about successful philanthropy-focused partnerships as a result. For example:
 - 1.1 CBT has been a long-term funder of **London’s Giving** which supports the development of place-based giving schemes in each of London’s 32 boroughs and associated peer support, learning networks and resources to enable a sustainable future for place-based giving in London. By taking an assets-based approach, the London’s Giving Model brings together the voluntary, private and statutory sectors and builds on the notion that everyone has something to give – be this time, skills or money. It is breaking new ground in understanding how communities can come together from the grassroots to tackle issues such as poverty, loneliness, mental health and unemployment.
 - 1.2 the **Beacon Collaborative** which is a collective impact initiative focused on raising the scale and impact of philanthropy from High-Net-Worth individuals.
 - 1.3 **Heart of the City** which is the UK’s largest Responsible Business network for SMEs. Part of its focus has been on supporting SMEs to develop and deliver higher impact corporate philanthropy and volunteering schemes. What we’ve learnt.
 - 1.4 **London Funders** which is the membership network for funders and investors of civil society from all sectors – charitable, statutory and private. As well as funding it to host the London’s Giving Network, CBT has provided a core grant of £50k p.a. for the past 5 years which it is likely to renew during the coming year.
 - 1.5 CBT has long recognised the importance of civil society support organisations which help build the capacity of frontline organisations and which co-ordinate voluntary activity, be this at local, sub-regional or regional levels. Recognising the need for a London-wide co-ordinating body for London’s Civil Society, CBT established **LondonPlus** in 2017 and has invested £865,000 towards its establishment over the past 3 years. It has been a key and vital voluntary sector partner in the Covid-19 crisis response.
2. Collaboration to enable higher impact and/or higher value philanthropy has also lain at the heart of CBT’s engagement with the pioneering funder collective, the London Community Response (LCR) (see paragraphs 3-4 in **Appendix 1** above) during the pandemic.
3. Prior to the pandemic, much effort under this pillar was focused on developing a potential co-location project, working in close collaboration with Anchor Partners. Changes to plans for the building originally envisaged for this project together with broader disruption in the co-location market wrought by Covid-19 have constrained progress in the last financial year. CBT officers are currently engaging with the anchor partners, the City Surveyor’s Department and with

CoLC Members to scope the ongoing potential of this project and will update the relevant committees shortly.

4. Officers also committed to increasing the CoLC's understanding of the leverage achieved through its philanthropy. At this stage, the primary learning has been through CBT who have measured leverage for the first time during this period. 82% of the 317 funded organisations who responded to this part of CBT's annual survey stated that CBT funding has a positive (50%) or strongly positive (32%) effect on their other fundraising. In the coming period we anticipate significant additional leverage will be achieved through the Corporate Charities Review with Aldermanic Charities such as the Sir William Coxen Trust Funds and the Emanuel Hospital both likely to lever significant additional funding in the coming year.
5. Drawing on the outputs and learning above, priorities for the 'Supporting Philanthropy Pillar' for the 2021-2023 implementation period are set out in **Appendix 5**.

Appendix 4:

Outputs and learning from Pillar 3 of the Philanthropy Strategy ("Key audiences are better equipped to generate higher impact and/or higher value philanthropy as a result of the CoLC and CBTs' awareness-raising activities about it"):

1. In order to convene and contribute, with authority, to broader awareness-raising initiatives around high impact and/or high value philanthropy, the CoLC needs to ensure it is role modelling excellent philanthropy itself in whichever capacity it is acting – whether for itself, as a charity trustee or otherwise. With this in mind CBT has developed, since 2019, an Impact and Learning Team supported and challenged by an independent external 'learning partner', Renaisi, which reports on a six monthly basis, with additional one-off reporting as necessary. These reports CBT in improving and developing its learning practice.
2. CBT has also funded and regularly contributes to a number of member-led partnerships which increase and amplify understanding of what drives effective philanthropy such as:
 - 2.1 London Funders (the umbrella body for Institutional, Corporate and Government Funders across London) which has provided an invaluable platform through which to raise awareness of high impact and/or high value philanthropy across an increasingly engaged cross-sectoral funding community.
 - 2.2 the Beacon Collaborative and Heart of the City, referred to in paragraphs 1.2 and 1.3 of **Appendix 3** above.
 - 2.3 The London's Giving initiative, described in more detail in paragraph 1.1 in **Appendix 3** above, provides tailored support for local giving schemes, as well as maintaining and extending a learning network and an evidence base and knowledge hub on place-based giving schemes.
 - 2.4 **LondonPlus**, referred to in paragraph 1.5 in Appendix 3 above has amplified, , in partnership with the GLA, learning relating to the growth of volunteering during Covid-19 and communicated it to key audiences through the pan-London Strategic Response work
3. The CGU is also deepening its oversight and expertise to support colleagues across the CoLC, as well as other CoLC grant-making charities, to ensure their grant-making is as impactful as possible and their administration effective and efficient. The Head of the CGU also plays an active role in learning from and sharing best practice with Borough Grants Officers and both he and the Social Investment Director are in regular contact with Livery Grants and Social Investment Officers. In this next phase, we anticipate that the CGU will make a much more active contribution to awareness-raising initiatives.
4. More broadly, 'City Giving Day', an initiative of the Lord Mayor's Appeal to celebrate and amplify the scale and breadth of Corporate Giving and volunteering across the capital is providing the blueprint for equivalent celebrations in other cities across the UK.
5. Through their engagement in the Pan-London Covid Response work, Officers and Members have reflected on, and contributed to, awareness-raising discussions

hosted by organisations such as the Association of Charitable Foundations, the GLA and London Funders around how philanthropic practice is positively evolving as a result of the disruption wrought through the pandemic.

6. In particular, an independent evaluation of LCR is underway which aims to answer the following learning questions:

6.1 How can funders build on the experience of the LCR to enable future collaboration?

6.2 How can the experiences of civil society groups inform future ways of working?

6.3 How can LCR's approach to equity and inclusion continue to be strengthened?

6.4 What should the key areas of focus be as the sector looks towards renewal?

7. The evaluation will also examine the challenges of the collaboration, including

7.1 securing wide-spread corporate engagement in a purely London-based response;

7.2 the difficulty in agreeing funding priorities amongst such a diverse group of donors; and

7.3 the operational challenges of engaging as a single-issue funder, in a collaboration of such scale.

Appendix 5 - Recommended Philanthropy Strategy Implementation Plan 2021 – 2023

| What | By when | Lead Officer(s) |
|---|------------|---|
| Pillar 1: Role Modelling high impact philanthropy ourselves | | |
| 1.1 Continue work to develop a more accurate annual appraisal of the amount that we give in cash, kind, assets and skills. Agree key messages to share through our communications channels. (Chamberlain's, Communications) | Annually | Head of Charity & Social Investment Finance, Philanthropy Director, Head of CGU, Head of Charitable Comms |
| 1.2 Make recommendations for developing a deeper community of practice across the CoLC in relation to how we give and, in particular, how we assess, communicate and ensure consistency of scrutiny of the impact of our giving. Bring forward recommendations to members in respect of appropriate governance oversight at the appropriate juncture | March 2022 | Philanthropy Director, Head of Central Grants Unit, Head of Impact and Learning. |
| 1.3 Support the implementation of any resulting changes. | March 2023 | As above |
| 1.4 Implement the recommendations resulting from the Corporate Charities Review in order to ensure that the corporate charities, including those with grant-making activities, are well managed and governed and achieve maximum impact for their beneficiaries. | March 2022 | Corporate Charities Project Officer |
| 1.5 Further develop the work to enable more systematic linkages between the networks, assets and expertise of the CoLC and BHE's Bridging Divides strategy (e.g. through the BHE Strategic Review, the launch of the revised Employee Volunteering Programme etc.) | Ongoing | Philanthropy Director, Head of CGU. |
| Pillar 2 : Supporting high impact and/or high value philanthropy by others | | |
| 2.1 Maximise the impact of existing philanthropy-focused partnerships funded by the CoLC and CBT to ensure that limited resources are utilised effectively | Ongoing | Philanthropy Director, Head of CGU |

| | | |
|---|----------------|--|
| 2.2 Scope and develop future philanthropy-focused partnerships and collaborations for approval (not least those with a cross-sector focus, recognising the unique access the CoLC enjoys to business, government and civil society partners.) | Ongoing | Philanthropy Director |
| 2.3 Continue to scope and develop the co-location project as appropriate | Ongoing | Philanthropy Director, City Surveyors' Dept. |
| 2.4 Deepen our understanding of what CoLC philanthropy has leveraged – both from within City Bridge Trust and beyond it eg via the International Disasters Fund. | Ongoing | Head of Impact and Learning, Head of CGU |
| Pillar 3: Raising awareness of higher impact/higher value philanthropy through convening, research, thought leadership etc | | |
| 3.1 Reflect on the CoLC and CBT's learning around Philanthropy and determine what it would be useful to share, with whom, by when and the optimal platforms for doing so | September 2021 | Chief Grants Officer, Philanthropy Director, Head of CGU, Head of Charitable Communications, |
| 3.2 Identify other players in the philanthropy space who can complement, amplify and/or challenge CoLC/CBT perspectives and build/deepen partnerships with them | Ongoing | Philanthropy Director, Head of CGU, Head of Charitable Communications |
| 3.3 Commission and publicise research as appropriate around under-explored/under-exploited areas of Philanthropy | Ongoing | Head of Charitable Communications, Head of learning and impact. |
| 3.4 Use CoLC convening power to amplify other voices and organisations in the Philanthropy arena, including via the LM, Sheriffs and other Aldermen and Members as appropriate. | Ongoing | Philanthropy Director, Head of Charitable Communications |

| | |
|---|---|
| Committee(s) | Dated: |
| City Bridge Trust | 25 th March 2021 |
| Subject: The Prince's Trust Strategic Grant | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | Yes (funding is already set-aside for this grant) |
| If so, how much? | £3m |
| What is the source of Funding? | Bridge House Estates Unrestricted Income Funds: Designated Fund for grant-making |
| Has this Funding Source been agreed with the Chamberlain's Department? | Yes |
| Report of: Chief Grants Officer and Director of City Bridge Trust | For Decision |
| Report author: Shegufta Slawther, London Community Response Fund Funding Manager | |

Summary

This report informs you of the progress to date at the six-year mark of this 10-year strategic grant to the Prince's Trust (PT) – it provides information on the outcomes that have resulted for your consideration. It also outlines the planned activities for the next three-year period and the proposed allocation of resources in support of this activity.

Recommendations

Members are asked to:

- a) Note the report;
- b) Agree that satisfactory results have been achieved by the PT in the second three-year period (years four to six) of this strategic initiative;
- c) Agree the outline of planned activities for the next three-year period, with the agreement of the detail to be delegated to the Town Clerk in consultation with the Chairman, Deputy Chairman and Chief Grants Officer; and
- d) Approve, in principle, the next allocation of £3m funding from the £10m approved by the Court of Common Council, as outlined in Table 1 with the release of the grant on a quarterly basis contingent on the following:
 - i. Receipt of additional information to include: quarterly management accounts; quarterly breakdown of CBT grant spend including outputs for each programme; and satisfactory engagement in a review led by CBT consultant Dinah Cox, to

set the outcomes to be achieved for the next funding period of the strategic partnership.

Main Report

Background

1. In September 2014, this committee agreed to recommend a grant of £10m over a 10-year period to the PT, with break clauses at years three, six and nine, subject to effective delivery. This was subsequently approved by the Policy & Resources Committee, and the Court of Common Council. The grant period commenced in April 2015.
2. This strategic grant was awarded to enable the PT to impact some of the most socially deprived areas of London, and to ensure more work is done across London to assist young people from challenging backgrounds.

Current Position

3. To date, the majority of young people supported are aged 13-25. They have been engaged through PT's community-based outreach teams and core range of Education, Training & Development programmes; '*Get Started*', '*Team*', '*Explore*' (previously '*Fairbridge*') and '*Achieve*'. These programmes provide essential support to young people who are underachieving in education or at risk of underachieving; and young people who are unemployed and not yet ready for work. A summary of each programme and associated performance is provided in Appendix 1, and a case studies of young Londoners supported through '*Achieve*' and '*Get Started*' are provided in Appendix 2.
4. Outputs over the first three years of delivery are strong, with a steady growth year on year.
 - a. 2015/16 – 1,685 young Londoners supported
 - b. 2016/17 – 1,708 young Londoners supported
 - c. 2017/18 – 1,726 young Londoners supported
5. Outputs for years four to six were also strong but with slightly lower figures in 2018/19 and 2019/20 to reflect the complexities of the issues faced by young Londoners and the planned long-term support provided by the PT. There is then a sharp increase in outputs for 2020/21 to reflect the shift to online delivery due to restrictions borne out of the Covid-19 pandemic.
 - d. 2018/19 – 1,378 young Londoners supported
 - e. 2019/20 – 1,637 young Londoners supported
 - f. 2020/21 – 3,147 young Londoners expected to be supported through to the end of March 2021
6. Based on outcomes data captured by the PT, for the 11,281 young Londoners supported in total over the six years, 77% have achieved a positive outcome across employment, education, training and volunteering.

7. The outcomes data for 'Explore' is only captured three months after the intervention is complete, on the basis that it is often a first step into support from the PT. 68% of the young people supported came from a target background, including the following target support needs:
 - 64% presented with mental health needs
 - 18% were homeless
 - 48% had a disability
 - 13% were ex-Offenders
8. 69% of young people supported through 'Explore' have moved into a positive outcome. Of these, 24% had achieved hard outcomes such as securing teaching assistant jobs, paid work placements at Sky and full-time jobs at an energy company. 45% had moved into positive next steps, including progression mentoring, art therapy, or the 'Team' and 'Get Started' programmes.
9. Outcomes data that has been collected in relation to 'Get Started' London delivery shows that six months after completing the programme, 59% of young people had achieved a positive outcome; 24% were in employment and 34% in education and training. Within those in employment, education and training, 7% were also engaged in additional voluntary work
10. For London deliver of 'Team', 67% of young people achieved and remained in a positive outcome six months after completing the programme. 17% were in employment, 33% in education and training, and a further 17% were engaged in voluntary work.
11. Your Committee received a presentation from the PT in January 2021 with an update on the charity's response to Covid-19 and supporting young Londoners. In summary, digital delivery was adapted in March 2020; online crisis mentoring was offered to young people struggling with isolation, lost opportunity and poor mental health. Between 30th March and 3rd July 2020, 1,015 crisis support calls took place with young Londoners.
12. Multiple weekly Employment Workshops and Industry Webinars provided ongoing skills development. A Virtual Jobs Board advertised live vacancies with partner organisations, including those in the health care sector, where PT has been capitalising on opportunities for young people to re-skill and apply for jobs. This element of work is expected to become acutely important in the pandemic aftermath, when economic fallout on a par with that of 2008 can be expected, leading to considerable unemployment and with young people being affected the most severely.
13. Personal and Social Development group sessions (supporting 142 young Londoners) brought together young people to improve confidence, reduce anxiety, build connections and set goals. Development Awards were provided to support digital poverty; some 200 laptops went out to young people who were without any means of online communication. An Enterprise Relief Fund was launched to support those newly self-employed who would not qualify for

government support. Launched in partnership with NatWest, £3m was awarded through 616 grants.

14. The charity opened its Prince's Trust South London Centre officially in December 2019. Although closed through the first lockdown, it re-opened in October 2020 to run a diverse range of programmes, as well as provide a safe environment for those living in chaotic homes and provide the most vulnerable with access to facilities such as internet and washing machines. PT saw a high take-up from neuro-diverse young people who have struggled with online interventions. As such, the decision was taken to keep the centre open throughout the third national lockdown in order to continue to support those living in vulnerable or dangerous home environments, whilst ensuring the safety of staff and beneficiaries.

Proposed Objectives 2021 – 2024

15. The PPT Annual Youth Index was published in January 2021¹. The annual survey, conducted by YouGov, had over 2,000 respondents ages 16 to 25 year olds. It found that 26% of 16 to 25-year olds feel 'unable to cope with life', increasing to 40% among those not in education, employment or training (NEETs). 50% say their mental health has worsened since the start of the pandemic, more than half (56%) 'always' or 'often' feel anxious, which rises to 64% for NEETs. The report also revealed:

- 60% of young people believe that getting a new job feels 'impossible to achieve'
- 65% of NEETs feel that the longer they are jobless, the worse they feel about themselves
- Since the pandemic began: one on five young people (21%) have experienced suicidal thoughts, rising to 28% of NEETs
- 37% feel powerless to change their own future and nearly one in three (31%) think their opinions on issues do not matter.

16. Whilst the full impact of the Covid-19 pandemic fallout has yet to materialise, it is clear that young people are disproportionately affected; for many at the start of their working lives, they are facing the most hostile environment with regards to job opportunities and mental health and wellbeing stability. Another major consequence has been the loss of income to the PT; leaving it financially challenged with higher demand for services from young people than ever before. The charity has been able to reduce its deficit to c.£8m, through judicious management of resources, the rapid development of digital content of its services, and having taken advantage of the government's Coronavirus Job Retention Scheme. The PT anticipates it will take at least three years to return to the funding levels of 2019.

17. As a result of the above, the charity is currently undertaking a review of its work in order to focus finite resources to where it can make the most difference within the next three to five years, and achieve the most social impact. The pandemic has created a significant change for the PT's young people in terms of their

¹ <https://www.princes-trust.org.uk/about-the-trust/news-views/tesco-youth-index-2021>

prospects and the important of digital and blended delivery. The announcement and implementation of the strategic plan for the coming years have not yet been confirmed. However, the charity has identified the following areas of focus in London over the next three years.

18. *Employability*: PT will build on its strong focus on employability by campaigning for those young people furthest from the job market not to be left behind. Outreach will be sharpened to reach specific groups of young people from disadvantaged backgrounds; those who are from low income backgrounds, to those with a disability including mental health problems, but also those who are ready for work but challenged by their lack of networks and experience.
19. *Education Network*: building on the success of PT's in-education work, it will seek to build on its networks through links into City of London schools and colleges, as well as developing links with employers. Content will focus on work-readiness and improving visibility of future career opportunities. Outreach with schools and education providers across London will be pursued, with a concerted effort to increase the charity's early intervention presence in London schools. There are discussions with Chelsea FC Community Trust which is planning to provide a referral route into Achieve through its own community projects.
20. *Police Forces Programmes*: The New Metropolitan Police Liaison Office, Chief Inspector Andy Briers, has helped develop activities such as Operation Alliance in Haringey, where young people who have committed chargeable offences discuss being diverted onto an intervention programme with specially trained custody suite staff. Building on this, PT will explore the possibility of extending this programme with the support of City of London Police.
21. Currently, the charity is in discussions with partner organisations in Southwark, Lambeth and Lewisham about how its South London Centre could be used as a cross-organisational hub for those affected by youth unemployment. The possibility of bringing work coaches from the Job Centre and Department of Work and Pensions into the Centre are being considered, as well as offering facilities to grass-roots organisations whose own properties cannot facilitate social distancing measures.
22. It is proposed that the £3m funding for 2021 – 2024 will be allocated as detailed in Table 1.

Table 1

| The Prince's Trust and City Bridge Trust Strategic Partnership Draft London Budget 2021 - 2024 | | | | | | |
|--|-------------------------|--------------|-------------------------|--------------|-------------------------|--------------|
| Engaging with the hardest to reach and marginalised young people | April 2021 - March 2022 | | April 2022 - March 2023 | | April 2023 - March 2024 | |
| | Cost | Young People | Cost | Young People | Cost | Young People |
| Live – Reach & Engagement | £422,998 | 170 | £428,352 | 168 | £413,497 | 149 |
| Learn – Education Support | £291,560 | 1,062 | £297,391 | 1,062 | £303,339 | 1,062 |
| Earn – Employability | £230,720 | 249 | £218,455 | 222 | £226,211 | 228 |
| CBT Project Manager | £54,798 | - | £55,885 | - | £57,003 | - |
| Total Cost | £1,000,076 | 1,481 | £1,000,083 | 1,452 | £1,000,050 | 1,439 |
| CBT Contribution | £1,000,000 | | £1,000,000 | | £1,000,000 | |

Financial Assessment

23. The charity has faced significant financial challenges as a consequence of the Covid-19 pandemic. The salaries of numerous staff were claimed through the government's Coronavirus Job Retention Scheme from 1st May through to 31st August 2020. Across the whole organisation, frontline staff and numerous individuals in leadership roles remained working throughout that period, but all at a reduced capacity (four days a week for full-time staff). This enabled the charity to access and divert funds with the flexibility needed to support frontline services for young people.
24. PT are anticipating a slight increase in income for 2022 as fundraising events resume and it actively participates in the government's Kickstart Scheme, which provides funding to employers to create job placements for 16 to 24-year olds on Universal Credit. Other areas of fundraising and income generation are expected to grow.
25. Although only 49% of income is secured as the charity enters 2021/22, it reports that the pipeline of income has been weighted to account for the level of uncertainty and risk, and it is confident that the overall budget income will be achieved.
26. PT's reserves policy is to hold four to six months of operational expenditure, for which total expenditure (minus the cost of raising funds) is used in the calculation. We identified one area of risk around the charity's reserve policy. The Charity Commission recommends that the net book value of tangible fixed assets used to carry out the charity's activities, such as land and buildings, should be designated within a charity's unrestricted reserves. However, the PT

have not followed this advice; the 2020 annual report included land and buildings with a net book value of £14.8m in its free reserves. This is a significant proportion (69%) of the total £21.6m value of the PT's calculated free reserves. In a period where there is significant uncertainty around the property market this should be considered a risk as the charity does not have access to liquid funds. By 2022 PT's free reserves are forecast to hold £14.3m, meaning land and buildings could represent the entire value of free reserves. The charity has confirmed that it could draw down the expendable portion of its endowment funds (£10m of the £12.4m in endowment funds) to mitigate against the risk of its reserves largely being made up wholly of tangible fixed assets. Note that the latest audited accounts do not present an element of the endowment fund as being expendable, with confirmation of this status provided by PT.

27. The charity's board of trustees are continually reviewing the financial position and will be revising plans to adapt to the current financial position. Longer terms budgets are being created, which will incorporate plans to re-establish its reserves levels through increases in revenue to pre-Covid levels, whilst continuing to manage costs robustly.

| Year end as at 31 March | 2020 | 2021 | 2022 |
|--|------------------|------------------|--------------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 88,340,000 | 60,025,281 | 63,294,553 |
| - % of Income confirmed as at 04/03/2021 | N/A | 100% | 49% |
| Expenditure | (80,633,000) | (60,176,924) | (70,365,828) |
| Total surplus/(deficit) | 7,707,000 | (151,643) | (7,071,275) |
| Split between: | | | |
| - Restricted surplus/(deficit) | 6,357,000 | (576,087) | 647,013 |
| - Unrestricted surplus/(deficit) | (11,044,000) | 424,444 | (7,718,289) |
| - Endowment surplus/(deficit) | 12,394,000 | 0 | 0 |
| | 7,707,000 | (151,643) | (7,071,276) |
| Cost of Raising Funds | 15,174,000 | 7,547,000 | 8,147,000 |
| % Income | 17% | 13% | 13% |
| Operating Expenditure | 65,459,000 | 52,629,924 | 62,218,828 |
| Free unrestricted reserves: | | | |
| Free reserves held at year end | 21,600,000 | 22,024,444 | 14,306,155 |
| No of months of operating expenditure | 4.0 | 5.0 | 2.8 |
| Reserves policy target | 21,819,667 | 17,543,308 | 20,739,609 |
| No of months of operating expenditure | 4.0 | 4.0 | 4.0 |
| Free reserves over/(under) target | (219,667) | 4,481,136 | (6,433,454) |

Conclusion

The six-year period of this strategic grant has achieved strong numbers of young people supported, specifically those from particularly challenging backgrounds. At such a difficult time for the sector, the longevity of this partnership has provided the PT with the stability needed for planning future London delivery, as well as adopting

a flexible approach with your funding as best needed. More work needs to be done to develop the charity's ability to measure its long-term impact, and a review of the partnership to date would help inform the focus of the partnership going forward. As such, it is recommended that the grant for the next period of this strategic partnership be approved, with additional conditions to be met by the charity prior to the grant being drawn down. These include the provision of management accounts, quarterly breakdowns of grant spend including outputs, and engagement in a review of the partnership to confirm priorities and outcomes going forward.

Report author

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Appendix 1 – Programme Summaries and Performance

1. '*Achieve*' is PT's education programme, supporting young people at risk of educational under-achievement. The structure of the programme encourages the young people to develop relationships with other pupils and the teachers. In an unpressured learning environment, young people build confidence and interpersonal skills. Your funding has been instrumental in the growth of this programme. Over the six-year period, your funding has enabled PT to support 4,241 young people across '*Achieve*'. Of this number, your funding has supported 1,496 young people directly through Achieve Clubs (236 in years one through to three, and 1,260 in years four to six).
2. '*Explore*' is an individually tailored personal development programme for young people aged 16 to 25 who are disengaged, far away from reaching their potential, have chaotic lifestyles, and who are unable to overcome the problems in their lives. Young people participate in a combination of group activities, opportunities, experiences, and one-to-one support directly delivered by PT staff in their London centres. Sessions support the development of life, personal and social skills such as communication, managing feelings, positive citizenship and taking personal care of themselves and others. Your funding has enabled PT to engage 1,354 young people onto '*Explore*' through their outreach work over the past six years. Of this, your funding has supported 457 young Londoners to complete the '*Explore*' programme (196 in years one through three, 261 years four through to six).
3. '*Get Started*' programmes are short courses which engage young people into further education, training or employment, through specific themes such as sport or the arts. Delivered with expert partners, the programme enables young people to develop their skills through practical activities, giving them confidence and motivation to move on with their lives. Over this six-year period, your funding has enabled PT to engage 2,541 young people onto their '*Get Started*' programmes through their outreach work. Of this number, you have funded the costs for 982 individuals to complete a '*Get Started*' programme (236 in years one to three, and 746 in years four to six).
4. '*Team*' is a 12-week personal development programme, which combines group and individual learning activities, enabling young people to leave equipped with a range of skills. Young people on '*Team*' improve their employability through work placements and skills workshops; work directly with members of community organisations to make a difference and build community cohesion; develop their teamwork and communication skills; and gain nationally recognised qualifications. Your funding to date has supported 1,976 young Londoners in total through this programme, (1,382 in years one through to three, and 594 in years four to six).

Appendix 2 – Case Studies

Aiden's Story – 'Achieve'

As he neared the end of primary school, Aiden started truanting and misbehaving in class – behaviours that continued into secondary school. His teachers knew him as rude and disruptive, and when moving to a new school did not help, his chances of passing his exams looked slim.

Aiden would regularly skip school to buy drugs and shoplift. Eventually, he was recommended to join The Prince's Trust's 'Achieve' programme whilst attending a local Pupil Referral Unit. Here, he started to turn his reputation around. Although he was initially withdrawn, as the group began to work on their Level 1 Teamwork, Aiden began to engage with enthusiasm, showing skills in IT and Maths. He started taking a leading role with supporting others in the group and was kind and caring towards his peers.

As his school adapted to the Covid-19 pandemic, Aiden continued to improve his focus and engagement. He enjoyed the smaller classes on the days he was invited into school and showed self-motivation despite the temptation of lockdown. Since his return to school in September 2020, Aiden continues to work on his career planning and personal development units for the Achieve qualification. Moreover, his attendance is now at an all-time high, and the whole school has noticed his respectful behaviour, desire to help others and his correct wearing of the school uniform. He has also stopped smoking cannabis and has a much more stable personal life.

For the first time, Aiden has hopes and aspirations for the future. He is applying for an apprenticeship with Western Power to become an electrician and has a contingency plan to attend college for an electrician's course. He is positive he will achieve his English Language & Literature, Maths and Triple Science GCSEs, and credits his success to the 'Achieve' programme.

Young Person A – 'Get Started with Web Design'

Young person A expressed their concerns at the start of the programme, as they suffered with anxiety, depression, low self-esteem and confidence in all settings and would constantly tell themselves that they were not good enough.

However, it became apparent during the Taster Day that Young Person A was willing to try and push beyond their comfort zone if they were given them the confidence to believe they could succeed. They were therefore included on the main programme to help them develop this self-confidence, and on the very first day showed real leadership skills and settled well within the group.

By the final day of the programme, Young Person A had grown hugely in confidence, had shown real signs as a talented web designer, and had helped other group members who needed help designing their web blogs by offering support and advice to them. Young Person A then delivered an insightful and brilliant presentation to

both the programme members and delivery partner and Trust staff, confidently speaking about their journey and experience.

As a result of their amazing progress, Young Person A was offered a full-time role with our delivery partner, with the opportunity to develop their skills-set and gain vital job experience. In addition, Young Person A supported on the Get Started in Web Design run in January 2021 as a trainee facilitator.

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Agenda Item 8

| | |
|---|-----------------------------|
| Committee(s) | Dated: |
| City Bridge Trust | 25 th March 2021 |
| Subject: Grants Budget and Applications Today | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer & Director of City Bridge Trust (CGO) | For Information |
| Report author: Emma Horrigan, Data Analyst | |

Summary

This paper summarises grant applications recommended for decision at today's meeting, and those that have been considered since your last meeting under your schemes of delegation.

Recommendation(s)

Members are asked to:

- a) Note the report

Main Report

1. 51 Bridging Divides grant recommendations are brought to your March meeting, with 3 grant recommendations for your decision today (see section 9a of today's papers). 48 grants are to be noted as approved by delegated authority since your last meeting under the new temporary thresholds agreed in March 2020 to support the business of the Trust through the current period. These approvals do not include grants agreed as part of the London Community Response Fund (LCRF).
2. Table 1 also includes a further 9 applications that have been approved under delegated authority since the main papers were compiled; and a further 3 applications presented elsewhere in your papers for approval today.

| Action | Bridging Divides | |
|---|-------------------------|------------------|
| | Nº | £ |
| Approved by delegated authority (£0 to £250k) | 48 | 3,435,705 |
| Pending applications for approval | 3 | 52,7000 |
| Total | 51 | 3,962,705 |

3. A further 3 applications are either recommended for rejection or have been withdrawn by the applicant (sections 10b and 10c of today's papers).

| Action | Nº |
|------------------------------|-----------|
| Recommended for rejection | 2 |
| Withdrawn & lapsed (to note) | 1 |
| Total | 3 |

4. There are 10 new variations to grant awards to report at today's meeting.
5. Table 3 (below) shows the implications of today's recommendations against your 2020/21 grants budgets. If you approve all of the grants recommended and pending today the remaining year 3 (2020/21) Bridging Divides budget allocation is £1,647,791 once variations and designated funds are accounted for.
6. Today's papers include the grants awarded as part of the LCRF. This fund has been established by the City of London Corporation through its charity, Bridge House Estates. City Bridge Trust and the Greater London Authority, among other funders, have contributed to this Fund. The 18 grants for a total of £413,341 included in today's paper are all 'wave 5' grants. Further details are in the CGO's report. This is a fast-moving programme and officers will be able to advise of the live grant spend figure at the time of your meeting.
7. For information Table 3 also shows your Anniversary Infrastructure Programme budget (Cornerstone and Bridge Fund).

| Table 3: Overall spend against 2020/21 total grants budgets | | | | | | | | | |
|--|------------------|-------------------|-----------------------------|------------------|--------------------------------------|-------------------|--------------------|------------------|-------------------|
| | Bridging Divides | | Cornerstone and Bridge Fund | | London Community Response Fund Total | | The Princes' Trust | Total | |
| Budget | | £ | | £ | | £ | | £ | |
| 2019/20 designated fund | | | | 1,164,390 | | | | | 1,164,390 |
| 2019/20 additional allocation spend ¹ | | (9,858,356) | | 0 | | | | | (9,858,356) |
| 2020/21 budget ² | | 20,000,000 | | 0 | | 16,547,418 | | 0 | 36,547,418 |
| The Princes' Trust | | | | | | | | 3,000,000 | 3,000,000 |
| Budget transfer | | (15,250,000) | | | | 15,250,000 | | | |
| Additional allocation approved - CBT Committee July 2020 | | 5,000,000 | | | | | | | 5,000,000 |
| Grants uplift | | 8,333,333 | | 0 | | | | 0 | 8,333,333 |
| Additional allocation approved - CBT Committee September 2020 | | 15,000,000 | | | | | | | 15,000,000 |
| Additional allocation approved - CBT Committee January 2021 ³ | | 5,000,000 | | | | | | | 5,000,000 |
| LCRF Lottery Fund Underspend Return | | | | | | (62,944) | | | (62,944) |
| Admin costs | | | | | | (734,424) | | | (734,424) |
| Total budget | | 28,224,977 | | 1,164,390 | | 31,000,050 | | 3,000,000 | 63,389,417 |
| Grant Commitments | | | | | | | | | |
| Grants awarded in 2020/21 | 22,017,243 | | 0 | | 27,082,175 | | | 49,099,418 | |
| Funds designated but not yet awarded ⁴ | 171,010 | | | | | | | 171,010 | |
| RRR1 Unspent Funds | (43,361) | | | | | | | (43,361) | |
| Funds designated for the RRR project | 310,000 | | | | | | | 310,000 | |
| The Bridge Programme Funder Plus | 360,000 | | | | | | | 360,000 | |
| Less 2020/21 variations to date ⁵ | (60,562) | | 0 | | (176,607) | | | (237,169) | |
| Net grant commitments 2020/21 to date | | 22,754,330 | | 0 | | 26,905,568 | | 0 | 49,659,898 |
| Remaining budget 2020/21 | | 5,470,647 | | 1,164,390 | | 4,094,482 | | 3,000,000 | 13,729,519 |

| | | | | | | | |
|--|-----------|------------------|---|-----------|----------------|------------------------------|------------------|
| Today's meeting | | | | | | | |
| Grant commitments | | 3,962,705 | | 0 | 413,341 | 3,000,000 | 4,376,046 |
| Today's meeting total | | 3,962,705 | | 0 | 413,341 | 3,000,000⁶ | 7,376,046 |
| Less today's variations | (139,849) | | 0 | | 0 | | (139,849) |
| Remaining budget 2020/21 after today's meeting | | 1,647,791 | | 1,164,390 | 3,681,141 | 0 | 6,493,322 |

Emma Horrigan, Data Analyst

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1. This figure was updated from the March Committee figures with 2 variations and 1 grant made between the meeting and the financial year end (£20k small grant for E17 Puppet Project).
2. £15.25M of the BD budget was transferred to the London Community Response Fund. The remainder of the LCRF includes contributions from the GLA (£5m), Paul Hamlyn (£500k), other organisations and 1 individual. Additional Wave 4 funding has come from GLA (£1.4m), Paul Hamlyn (£250k), Salters' (£8K), Armourers (£30K). Please note that the LCRF total sum includes operational costs and other expenditure yet to be deducted so is not all available for grants
3. This was allocated as £4M to LCRF and £1M to remain in BD budget for Wave 5 Aligned Funding
4. Remainder of £155,925 agreed at your March 2019 meeting towards the Responding to the Resilience Risk Pilot (£21,010 remaining grant spend) and £180k towards the core funding programme of work approved at your November 2019 meeting
5. Variations are write-backs and revocations to active grants that result in amounts being returned to the Trust.
6. Please note that if this grant is recommended in principle at today's meeting, the conditions may mean that the grant will not be drawn down until 2021/22 financial year.

Emma Horrigan

Data Analyst, Impact & Learning

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Bridging Divides Eligibility Criteria

| | |
|---|---|
| <ul style="list-style-type: none"> • Registered charity • Registered Community Interest Company • Registered Charitable Incorporated Organisation • Registered charitable industrial and provident society or charitable Bencom • Charitable company • Exempt or excepted charity | <ul style="list-style-type: none"> • Revenue grants cannot amount to more than 50% of an organisation's turnover/income in any one year • Organisations cannot hold more than one grant at a time, except where the application is for: an eco-audit, an access audit, or is made under one of the Trust's special one-off programmes or is a strategic initiative • Grants must benefit inhabitants of Greater London |
|---|---|

Bridging Divides Programmes

Connecting the Capital

- Capacity building support for civil society organisations
- Supporting Philanthropy
- Voice and leadership
- Place-based giving schemes
- Growing, greening and environmental projects
- Eco-Audits
- Arts, sports, health and/or well-being projects for Deaf and disabled people.
- Arts, sports, health and/or well-being projects for older people
- Access improvements to community buildings

Positive Transitions

- Specialist support services working with children and young people
- Support for migrants and refugees to access mainstream services and widen participation in the community in which they live
- Specialist support services for Deaf and disabled people to increase choice and control in their lives
- Specialist support services for older people, including people with dementia, to increase choice and control in their lives
- Survivors of domestic and sexual abuse; modern day slavery; trafficking; or hate crime
- Ex-offenders leaving custody or serving community sentences
- Services which improve the accessibility and range of mental health support and services for people who are experiencing or at risk of homelessness or are vulnerably housed

Advice and Support

- Provision of advice and support to disadvantaged individuals (from organisations with a recognised management qualification and/or advice quality standard)
- Food poverty (support for the infrastructure needed to support the distribution of food but not the direct purchase of food)

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| | |
|---|-----------------------------------|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Funds Ordinarily Approved under Delegated Authority | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Decision |
| Report author: David Farnsworth, Chief Grants Officer and Director of CBT (CGO) | |

Summary

This report advises members of funds to be approved that would usually be approved under delegated but are presented instead to the Committee in order to be able to confirm the total grants awarded this financial year. Assessment reports for all grants recommended for approval under delegated authority within this report are provided in Annex 1. Note that these are provided in the standard delegated authority format, which is different to the usual grant assessment reports.

Recommendation

Members are asked to:

- Approve 3 grant recommendations

Main Report

1. This report requests approval for 3 grant recommendations for requests which would usually be approved under delegated authority.
2. It is also worth reminding Members that the thresholds for determining the levels of delegated authority which can be used are on the sum requested and not the sum recommended.

Scott Nixon
 Head of Director's office
 020 4526 1213, Scott.nixon@cityoflondon.gov.uk

Grants to be approved by this committee

| ID | Name | Project Description | Requested Amount |
|--------------|------------------------------|---|-------------------------|
| 16031 | City & Hackney Carers Centre | £140,900 over three years (£46,290; £46,840; £47,770) for the salary and on-costs of a 2 dpw Bilingual Adviser/Project Manager and a 3 dpw Bilingual Advice Officer and associated project costs of running a specialist advice service for carers in Hackney and the City of London. Release of the second year's funding is conditional on the organisation gaining an Advice Quality Standard. | £140,924.00 |
| 16566 | Youth League (UK) Ltd | £249,500 over five years (£47,800; £47,400; £50,300; £50,200; £53,800) towards the salaries of a Project Manager (16 hpw) and Support Worker (18 hpw); activity costs; and overheads of the Integration Support Project aimed at young migrant and refugee girls. | £249,540.00 |
| 17433 | Ruils | £136,300 over 3 years (£46,400; £44,400; £45,500) towards the salary of a part-time Transition Worker (28hpw), staff costs for management and administration (14hpw) and other associated costs to deliver Bright Futures in Richmond. | £136,600 |
| TOTAL | | | £527,000 |

CITY BRIDGE TRUST – Delegated Authority (Requests up to £250k)

ASSESSMENT CATEGORY: Bridging Divides - Advice and Support\Provision of advice and support

City & Hackney Carers Centre

Ref: 16031

Amount requested: £140,924

Adv: Lily Brandhorst

Base: Hackney

Benefit: Hackney

Amount recommended: £140,900

Purpose of grant request: To provide a specialist advice service for unpaid carers and the people they care for in the City and London Borough of Hackney.

The Applicant

City and Hackney Carers Centre (CHCC) is a charitable company originally founded in 1996 by a group of carers who were struggling to find support. The 2011 UK census counted 18,000 unpaid carers who live or support someone living in Hackney and 576 in the City of London. CHCC works with carers to develop and deliver a range of needs-led support services. It has longstanding relationships with other local providers, London borough of Hackney and Hackney CCG, and is part of the Hackney Advice Partnership.

Background and detail of proposal

CHCC seeks funding for a part time Specialist Bilingual Adviser/Project Manager and a part time Bilingual Advice Officer, to provide an advice service to carers and the people they care for in the City and Hackney. The service will be delivered through two weekly advice clinics at GP surgeries and other community venues; a four hour weekly virtual drop-in session; and a telephone/remote access advice service operating one day a week for carers unable to access the drop-in. Advice will cover a range of relevant topics including housing, debt, welfare benefits and carers' entitlements; will be offered in English, Hindi, Urdu and Bengali; and will include follow-up caseworking as needed. The intended outcomes of this service are that more carers will: access the benefits and other support to which they are entitled; be able to manage their money better, avoiding further problems linked to debt/low income; and experience reduced stress and better choice and control in their lives.

While Covid-19 measures remain in place the service will be delivered completely remotely, with a view to returning to the delivery of in-person services once appropriate. CHCC has been developing remote services for carers for several years and is in a good position to deliver the work in this way.

Financial Information

In 2020 CHCC's loss of a longstanding contract to deliver services for LB Hackney resulted in diminished income and expenditure. The organisation is bouncing back from this substantial change and has seen significant success in fundraising from trusts and foundations during the period that followed. Free reserves are at a healthy level.

| Year end as at 31st March | 2020 | 2021 | 2022 |
|---|-----------------|---------------|-----------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 313,989 | 263,874 | 178,244 |
| - % of Income confirmed as at 5/2/2021 | N/A | 86% | 39% |
| Expenditure | (317,170) | (214,653) | (224,541) |
| Total surplus/(deficit) | (3,181) | 49,221 | (46,297) |
| Split between: | | | |
| - Restricted surplus/(deficit) | 12,110 | 60,768 | (27,884) |
| - Unrestricted surplus/(deficit) | (15,291) | (11,547) | (18,413) |
| | (3,181) | 49,221 | (46,297) |
| Operating expenditure | 317,170 | 207,120 | 223,071 |
| Free unrestricted reserves: | | | |
| Free unrestricted reserves held at year end | 107,747 | 96,200 | 77,787 |
| No of months of operating expenditure | 4.1 | 5.6 | 4.2 |
| Reserves policy target | 79,293 | 51,780 | 55,768 |
| No of months of operating expenditure | 3.0 | 3.0 | 3.0 |
| Free reserves over/(under) target | 28,455 | 44,420 | 22,019 |

Funding History

| ID | Type | Meeting Date | Decision |
|-------|------------------------|--------------|--|
| 15301 | Bridging Divides | 25/07/2019 | Withdrawal as the organisation currently does not hold a relevant advice quality mark or management qualification required for your Advice and Support priority. |
| 10670 | Working with Londoners | 28/07/2011 | £110,800 over three years (£36,800; £36,900; £37,100) for the salary of a full-time advice worker and some on-costs for a project supporting older carers. |
| 10480 | Working with Londoners | 17/02/2011 | Application for a very similar project which is not eligible at this time. Following discussion with your officer, the organisation has withdrawn. |

Recommendation

CHCC is an organisation with many years' expertise in supporting carers in the City and Hackney and a good reputation with relevant local stakeholders. Users' needs are clearly at the heart of its work. At time of applying the organisation was working with Advice UK to secure the Advice Quality Standard. This process has been delayed by Covid-19 but it anticipates receiving the standard in March 2021. A grant is recommended as follows:

£140,900 over three years (£46,290; £46,840; £47,770) for the salary and on-costs of a 2 dpw Bilingual Adviser/Project Manager and a 3 dpw Bilingual Advice Officer and associated project costs of running a specialist advice service for carers in Hackney and the City of London. Release of the second year's funding is conditional on the organisation gaining an Advice Quality Standard.

Approved.....
Chief Grants Officer /
Deputy CGO

Approved.....
Chair

Approved.....
Deputy Chair

Date.....

Date.....

Date.....

CITY BRIDGE TRUST – Delegated Authority (Requests up to £250k)

ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions\Migrants & refugees

Youth League (UK) Ltd

Ref: 16566

Amount requested: £249,540

Adv: Natalie Jordan

Amount recommended: £249,500

Base: Barking & Dagenham

Benefit: Barking & Dagenham

Purpose of grant request: Funding is sought for peer and key worker support for targeted intervention aimed at young migrant and refugee girls, primarily black Muslims, aged 16-18.

The Applicant

Youth League UK (YLUK) was founded under the name African Youth League by its now Programme Manager John Wainaina, in recognition by the London Borough of Barking and Dagenham of the local need for support of young Africans living in the borough. It registered as a charity in 2002. Its current name reflects its broadened reach to local young people of all backgrounds, though it maintains a specialism and recognised expertise in supporting Black and African young people. YLUK is BAME led and its decisions are guided by a youth steering committee, the chair of which sits as a co-opted board member. It is a member of London Youth, and working towards its quality mark, though this work has been delayed by the pandemic.

Background and detail of proposal

In this application, YLUK seeks support to target its existing model of youth work towards young migrant and refugee girls, providing emotional, social and practical support to young, predominantly Muslim, women aged 16-18 through peer group and one to one support, referrals and signposting, and social and recreational activities that are both gender and culturally sensitive. It plans to recruit to part time roles of Project Manager and Support Worker, who will be responsible for the ongoing recruitment and training of volunteers, and participants, with the Support Worker providing one to one support, referrals and signposting.

This work follows on from findings from a six-month pilot project, 'TEENSPACE', which supported 64 migrant and refugee girls aged 13-18 and concluded in November 2019. It identified a need for targeted cultural and faith sensitive work, due to a dearth of positive, targeted activities in the borough that catered to common interests and needs identified by girls in its cohort. YLUK also found young migrants in general face barriers in accessing support services, including mental health support, due to language barriers, reluctance from parents, and a lack of effective signposting and awareness, while girls in particular deal with an often much greater proportion of caring responsibilities than their male peers which can exacerbate other issues which can include mental health, social isolation, domestic violence and substance abuse. YLUK's beneficiaries also include unaccompanied minors. Through the pilot, engagement of peer buddies was effective in involving and engaging young people that were less typically likely to engage with the service. YLUK plan to further develop the Peer Intervention strand to adopt and "African Aunties" model: mirroring a familiar role model often found in

the targeted communities of older women, not necessarily related to a young person, volunteers to be recruited will be closer in age to the young people but over 18, to act as trusted adults.

YLUK has a strong track record in the borough, well situated to reach its beneficiaries, and is unique as the only non-faith-based youth service in the area targeting young BAME people. The proposed work meets your priority under Positive Transitions to support migrants and refugees to access mainstream services and widen participation in their communities. As a result of the pandemic, YLUK has been flexible in delivery depending on the latest guidance: group activities have been the most commonly adapted to an online format; between national lockdowns in person work in bubbles has been run successfully.

Financial Information

YLUK is currently reliant on two major sources of funding: the National Lottery Community Fund, which has funded a range of its projects for 17 years, and LB Barking and Dagenham. NLCF have encouraged YLUK to diversify its funding base, and this application is part of one strand of its new fundraising strategy for 2021 to 2026 to establish relationships with a larger range of trusts and foundations. Other areas of work include developing its earned income (through renting out its facilities, delivering training, and an education support service/tutoring). As the majority of income is from grants, flexibility from funders has afforded stability over the Covid-19 crisis. Indeed, YLUK has seen significant growth this year, attributable in part to a high success rate in accessing emergency funding, as well as a general growth in demand for its services.

The cost of raising funds was not detailed in the most recent signed accounts but estimates have been provided for the years ending 2021 and 2022.

| Year end as at March 31st | 2020 | 2021 | 2022 |
|---|-----------------|---------------------|--------------|
| | Signed Accounts | Management Accounts | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 141,046 | 240,405 | 277,975 |
| - % of Income confirmed as at 31/12/2020 | N/A | 100% | 34% |
| Expenditure | (109,419) | (228,553) | (274,953) |
| Total surplus/(deficit) | 31,627 | 11,852 | 3,022 |
| Split between: | | | |
| - Restricted surplus/(deficit) | (2) | 0 | (2,978) |
| - Unrestricted surplus/(deficit) | 31,629 | 11,852 | 6,000 |
| | 31,627 | 11,852 | 3,022 |
| Total expenditure | 109,419 | 228,553 | 274,953 |
| Free unrestricted reserves: | | | |
| Free unrestricted reserves held at year end | 64,799 | 76,651 | 82,651 |
| No of months of operating expenditure | 7.1 | 4.0 | 3.6 |
| Reserves policy target | 40,350 | 57,138 | 68,738 |
| No of months of operating expenditure | 3.0 | 3.0 | 3.0 |
| Free reserves over/(under) target | 24,449 | 19,513 | 13,913 |

Recommendation

£249,500 over five years (£47,800; £47,400; £50,300; £50,200; £53,800) towards the salaries of a Project Manager (16 hpw) and Support Worker (18 hpw); activity costs; and overheads of the Integration Support Project aimed at young migrant and refugee girls.

Approved.....
Chief Grants Officer /
Deputy CGO

Approved.....
Chair

Approved.....
Deputy Chair

Date.....

Date.....

Date.....

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CITY BRIDGE TRUST – Delegated Authority (Requests up to £250k)

ASSESSMENT CATEGORY: Bridging Divides - Positive Transitions\Children & young people\Who are disabled transitioning into adulthood

Ruils

Ref: 17433

Adv: Kate Halahan

Amount requested: £141,012

Base: Richmond

Benefit: Richmond

Amount recommended: £136,300

Purpose of grant request: The Bright Futures service will empower young people with disabilities/complex needs by giving them the information and support they need to transition smoothly into adulthood.

The Applicant

Ruils is a local user-led charity run by, and for, disabled people in Richmond. Its mission is to support adults and children with disabilities, including long-term health and mental health conditions, to live the life of their choice, be part of their community and reach their full potential. Originally called 'Richmond Users Independent Living Scheme', it was founded in 1999 to provide direct payment support. In line with local need, it soon expanded its services to provide a wide range of disability specific information and advice, advocacy, care planning support, social activities and befriending for disabled children and adults, and their families. It registered as a charity in 2003 and incorporated as a charitable company in 2009. As a Deaf and Disabled Peoples Organisation (DDPO), over 75% of its Trustees are disabled. It aims for 50% of staff to be disabled and requires all its children's services teams to have lived experience of being a parent of a disabled child.

Background and detail of proposal

This application is for a 3-year grant for Ruils to set up and deliver Bright Futures, a much-needed information, advice, planning and support service for disabled young people in Year 9 and above, and their families, to help them transition into adulthood.

Leaving school and transitioning into adult services is a critical stage in a disabled young person's life. Without the right support early on they are at high risk of ending up in the wrong setting, unsuitable education/training placements or dropping out completely. By the age of 26, disabled people are 4 times more likely to be NEET (Not in Employment, Education or Training) than non-disabled people (Papworth Trust, 2018). The Transitions team within London Borough of Richmond's children's services is over-stretched and only able to provide the infrastructure around the transition process, rather than direct support. For example, a social worker will not be able to make a recommendation to a disabled young person or parent for a local college, club or training opportunity. As a result, Ruils receives a high level of demand for transition support through its three existing children's services (befriending, family support and SEN advice for school ages), with over 40 clients a year saying they cannot access the information and support they need to plan for education/social/healthcare transitions. It receives referrals from the council and provides ad hoc advice to 'Post-16 Maze', a transition support group of around 35 local parents. Staff at Richmond's special schools and charities believe a transition

support service is desperately needed by over 80 young people/families annually. The Bright Futures service was therefore developed over the last couple of years, in consultation with the above groups, to fill this gap in essential support.

Bright Futures will be delivered by a dedicated Transition Advisor who will work directly with 120 young people in Year 9 and above, each year, to empower them to think about their aspirations, understand their options and set a plan for their future. The Advisor will also work with parents who, due to their children's disability or complex needs, may make many if not all of the transition decisions. Through a series of workshops across the academic year, young people/their families will be supported to create a Person-Centred Plan identifying their aspirations for the future and steps to get there; plan the skills they need to develop to enable a fulfilling, independent adult life (academic, social or practical skills); and research, evaluate and secure the most appropriate further education/training opportunities. The service will also support young people/their families to understand the transition process and how to navigate it, to ensure a smooth transition into adult services, helping them to plan and secure the support they need. The workshops will include group sessions, to provide a space to share and socialise, as well as 1-1 for more individual support. The location of the workshops will be flexible depending on the needs of those attending, including Ruils' office space at the Disability Action & Advice Centre in Teddington, local special schools and community centres. The service can be adapted to some online delivery where necessary due to the impacts of COVID-19, as with the charity's other services. A hybrid of online options may be offered to parents regardless, in recognition of feedback that more recent online sessions have made it easier for some to attend who may struggle to usually. Ruils will also develop an online knowledge base on its website, as a much needed one-stop place for young people and parents to find essential information on the transition process, such as when to start preparing, what to consider and options available (education, training, apprenticeships, social and healthcare).

As a new service, Ruils requests funding for the set-up, delivery and evaluation of the first 3 years of Bright Futures. As the service develops, it will look to apply to the Trust for continuation funding, as well as identifying wider funding sources to continue long-term delivery.

Financial Information

Ruils has grown steadily year-on-year, securing a balanced range of income from statutory contracts, notable grant-giving bodies, community fundraising and client contributions, such as towards befriending and counselling sessions. It has grown substantially this year (nearly 70% increase in turnover) after being awarded a 3-year Social Prescribing contract by Richmond General Practice Alliance (NHS Richmond). This has involved obtaining 15 new staff in the first year (almost double previous numbers), with additional challenges around onboarding remotely. However, the transition appears to have been smooth and the programme is progressing well, showing there is strong management in place to lead the charity through this period of change. The contract is due to end in October 2023, after which Ruils is confident in renewing it for a further two years. With the recent increase in unrestricted expenditure, the charity is falling short of its reserves policy to hold the equivalent of 3 months running costs but it is focused on strengthening this position, already securing 83% of income for 2021/22. The provision of Ruils' office space at

the Disability Action & Advice Centre is a gift in kind from the London Borough of Richmond, amounting to an approximate value of £20,000 per annum.

| Year end as at 31st March | 2019/20 | 2020/21 | 2021/22 |
|---|-----------------|---------------|---------------|
| | Signed Accounts | Forecast | Budget |
| | £ | £ | £ |
| Income & expenditure: | | | |
| Income | 675,402 | 1,140,736 | 1,155,499 |
| - % of Income confirmed as at February 2021 | N/A | 100% | 83% |
| Expenditure | (644,972) | (1,127,723) | (1,143,224) |
| Total surplus/(deficit) | 30,430 | 13,013 | 12,275 |
| Split between: | | | |
| - Restricted surplus/(deficit) | 21,126 | 181 | 68 |
| - Unrestricted surplus/(deficit) | 9,303 | 12,831 | 12,207 |
| | 30,430 | 13,012 | 12,275 |
| Cost of Raising Funds | 6,016 | 1,950 | 550 |
| % Income | 1% | 0% | 0% |
| Operating Expenditure (unrestricted) | 437,722 | 734,709 | 871,146 |
| Free unrestricted reserves: | | | |
| Free unrestricted reserves held at year end | 103,680 | 116,511 | 128,718 |
| No of months of operating expenditure | 2.8 | 1.9 | 1.8 |
| Reserves policy target | 109,431 | 183,677 | 217,787 |
| No of months of operating expenditure | 3.0 | 3.0 | 3.0 |
| Free reserves over/(under) target | (5,751) | (67,166) | (89,069) |

Funding History

None.

Recommendation

Ruils is a well-managed organisation, with the expertise, lived experience and trusted local relationships to deliver an essential, high-quality, and impactful transition support service for disabled young people and their families in Richmond. The application clearly meets the outcomes of the Positive Transitions strand, under the priority area to provide specialist support services for disabled young people transitioning into adulthood. The recommendation is slightly less than the revised request as additional support costs were reduced to be comply with the Trust's funding policies for Bridging Divides. Funding is recommended as follows:

£136,300 over 3 years (£46,400; £44,400; £45,500) towards the salary of a part-time Transition Worker (28hpw), staff costs for management and administration (14hpw) and other associated costs to deliver Bright Futures in Richmond.

Approved.....
Chief Grants Officer /
Deputy CGO

Approved.....
Chair

Approved.....
Deputy Chair

Date.....

Date.....

Date.....

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| | |
|---|---|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Funds Approved or Declined under Delegated Authority | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | CBT Bridging Divides Grants budget |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Information |
| Report author: Scott Nixon, Head of Director's Office | |

Summary

This report advises members of funds approved under delegated authority since your last meeting.

Recommendation

Members are asked to:

- Receive this report and note its contents

Main Report

Following the urgency approval of the Court of Common Council on 7th April 2020, the delegated authority thresholds are as follows:

- a) Applications of up to £50,000 may be approved by the Chief Grants Officer (CGO) in their absence, the Deputy Chief Grants Officer (DCGO);
- b) Applications of between £50,001 and £100,000 to be approved by the CGO or in their absence the DCGO, in consultation with the Chamberlain.
- c) Applications of between £100,001 and £250,000 to be approved by the CGO or in their absence the DCGO in consultation with the Chamberlain and the Chair and Deputy Chair;
- d) Applications of more than £250,000 to be approved by The City Bridge Committee.

The total amount of expenditure and number of items approved under delegated authority this financial year (inclusive of those below) are shown in Table 1.

Applications considered comprise Investing in Londoners, Bridging Divides, Small Grants and Stepping Stones programmes.

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Requests approved under delegated authority (£250,000 or less)

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|-------|------------------------|------------------|--|---------------------|
| 18502 | Action on Disability | 01/03/2021 | £50,000 over 12 months for the full time Project Coordinator and contributions towards part-time youth workers and sessional staff. | £50,000 |
| 18494 | Bede House Association | 22/02/2021 | £49,850 over 29 weeks for premises, central admin and management costs associated with the Starfish Domestic Abuse Service and Bede Youth. | £49,850 |
| 18496 | Bromley Mencap | 22/02/2021 | £50,000 over one year comprising £33,300 as a contribution towards the salary of the Deputy Chief Executive and £16,700 to cover the full salary of the Administrator (25 hours a week) | £50,000 |
| 18000 | Build Up Foundation | 25/03/2021 | £46,000 to Build Up Foundation for additional staff time from the director to work with a product development consultant, set up a cloud-based accounting system and financial modelling, develop a CRM system and board recruitment, to enable the organisation to apply for social investment. | £46,000 |
| 16062 | Capital Kids Cricket | 25/01/2021 | £250,000 over 5 years (5 x £50,000) to build organisational capacity (through employing an Operations Manager) and to scale-up social impact by delivering more projects to youth experiencing learning-disabilities, mental-health difficulties and physical disabilities. | £250,000 |
| 18504 | salary costs | | Certitude Support 23/02/2021 £50,000 over 12 months of two new IT posts | £50,000 towards the |

(£30,000) and additional IT equipment (£20,000)

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|-------|-----------------------------------|------------------|--|--------------------|
| 18491 | City Harvest | 01/03/2021 | £44,100 to contribute to the salaries of the Community Impact Manager and Community Impact Officer over the next 12 months. Funding is conditional on receipt of a sufficient Job Description for the Community Impact Manager. | £44,100 |
| 18485 | Disability Rights UK | 01/03/2021 | £18,750 towards the salary costs over 12 months for two core salaries, as detailed in the application, together with a contribution towards running cost. | £18,750 |
| 17434 | Eritrean Community in the UK | 18/02/2021 | £53,500 over two further and final years (£26,500; £27,000) for the salary of a part-time (17.5hpw) Volunteer and Health Development Officer (VHDO) and towards associated projects costs working with people aged 75+ | £53,500 |
| 15245 | The Faith and Belief Forum (F&BF) | 18/02/2021 | £208,710 over 5 years (£34,760; £36,820; £42,960; £45,650; £48,520) towards a 0.4 FTE Co-ordinator and associated running costs. | £208,710 |
| 18489 | Generate Opportunities Ltd | 22/02/2021 | £43,600 over 12 months to employ two part-time Volunteer Coordinators (£24,335 for two positions at 15 hours a week) with additional budget allocated to IT equipment, volunteer expenses and additional core costs. | £43,600 |
| 18492 | Habinteg Housing Association Ltd | 01/03/2021 | £50,000 over 12 months towards the costs of core training programmes; upskill training and 'Wayfinding and External Environments' training for disabled people in London, and training for London local authorities and access panels on accessibility of shared spaces. | £50,000 |
| 15939 | Her Centre | 18/02/2021 | £120,700 over two further and final years (£59,900; £60,800) for the FT Outreach and Development Coordinator and associated project costs. | £120,700 |
| 18498 | Jewish Women's Aid | 22/02/2021 | £50,000 over 12 months towards the full-time salary of a Domestic Abuse Client Support Worker and associated costs and contributions to the Domestic Abuse Team Manager, Chief Executive, and Client | £50,000 |

Services Team costs.

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|------------|--------------------------------------|-------------------------|--|---------------------------|
| 18503 | Just for Kids Law | 01/03/2021 | £50,000 over 12 months towards the salaries of the Operations Manager (0.6 FTE), Operations Support Assistant (0.5 FTE), Director of Finance and Resource (0.1 FTE) and the cost of the Apricot Licence. | £50,000 |
| 18501 | Lambeth Elfrida Rathbone Society | 01/03/2021 | £50,000 over one year towards core costs including salaries, travel costs, space rental, promotional costs and overheads. | £50,000 |
| 15985 | London Irish Centre | 26/01/2021 | £4,120 towards an access audit of the London Irish Centre. | £4,120 |
| 17025 | Merton Centre for Independent Living | 08/03/2021 | £247,000 over 5 years (£47,500; £48,500; £49,500; £50,400; £51,400) towards the salary of a full-time Caseworker (35hpw), Office Manager (1hpw) and Service Manager (4hpw) and other associated costs to deliver the Advocacy and Advice service in Merton. Release of year 2 instalments will be dependent on receipt of sufficient evidence that Merton CIL has sought, and implemented if necessary, up-to-date safeguarding advice from a relevant body. | £247,000 |
| 18495 | Mind in Harrow | 01/03/2021 | £50,000 core funding over 12 months to cover the shortfall in key salaries across the team. | £50,000 |
| 18483 | Mind in Tower Hamlets and Newham | 22/02/2021 | £49,200 over one year to employ two part-time workers (£41,638 for two positions, a Community Engagement Manager at 28 hours a week, and a Community Engagement Worker at 14 hours), with additional budget allocated to IT support and support costs for the posts. | £49,200 |
| 18487 | Muscular Dystrophy UK | 23/02/2021 | £42,961 towards the costs of core salaries for 12 months, as identified in the application, together with some overheads. | £42,961 |

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|-------|--|------------------|--|--------------------|
| 16043 | National Trust, Morden Hall Park | 15/01/2021 | £130,400 over 3 years (£41,600; £43,700; £45,100) towards youth engagement and participation work at Morden Hall Park including a contribution towards two part-time salaries (Engagement Officer and Park Ranger); tools and equipment; and related costs. | £130,400 |
| 17583 | Nature Vibezzz | 10/02/2021 | £30,000 over three years (3 x £10,000) towards the costs of delivering 30 Forest School and nature conservation activities per year in London, including the Forest School Leader's salary (1.5 days per week pro-rated) plus on-costs, and related project costs. | £30,000 |
| 18482 | Paddington Development Trust | 01/03/2021 | £50,000 over one year towards the core costs including a contribution towards the salary costs of the CEO, DCEO and SFO. | £50,000 |
| 17883 | Play Adventures & Community Enrichment | 25/03/2021 | £64,400 over two further and final years (2 x £32,200) allocated across multiple staff costs (one Project Lead and eight support staff), to continue the Artist in Training programme to specifically benefit disabled children. | £64,400 |
| 17994 | Re-engage | 03/02/2021 | £92,900 over two further and final years (£45,700; £47,200) for the full-time salary of the North London Development Officer and associated project costs. | £92,900 |
| 16065 | Re-Instate Ltd | 18/02/2021 | £170,000 over 5 years (£33,500; £33,000; £33,500; £34,500; £35,500) to deliver the Living Well project in Bexley, including the salary and on-costs of two 0.5FTE Project Coordinators, and a contribution to related project costs and organisational overheads. | £170,000 |
| 18497 | The Renewal Programme | 01/03/2021 | A £50,000 core grant over one year towards fundraising, digital/marketing, and volunteer co-ordinator salaries (under 17.5 hpw), consultation costs, staff training and development and obtaining Trusted Charity Status. | £50,000 |
| 16025 | The Sound Lounge Trust CIC | 15/02/2021 | £2,000 (5 days) to provide an eco-audit | £2,000 |

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|------------|--|-------------------------|---|---------------------------|
| 18486 | Spinal Injuries Association | 22/02/2021 | £49,158 towards the core services of SIA over one year. | £49,158 |
| 18484 | St Joseph's Hospice | 01/03/2021 | £44,500 over 12 months towards the salary of the Head of Supportive Care, equivalent to the proportion of the role's remit to manage core non-clinical services. | £44,500 |
| 18493 | Stratford Circus Arts Centre | 22/02/2021 | £48,250 over one year to contribute to core staff salaries, including the Engagement Co-ordinator, Development Manager and Interim CEO. | £48,250 |
| 15920 | Sudbury Neighbourhood Centre (Middlesex) Limited | 09/02/2021 | £40,000 over two further and final years (2 x £20,000) towards the full-time salary of a Care Manager (replaces Senior Care Assistant) to coordinate and deliver activities for elderly clients with dementia and to adults with learning difficulties and disabilities. | £40,000 |
| 15925 | Sutton Borough Citizens Advice Bureaux | 25/02/2021 | £201,000 over 3 years (£65,000; £67,000; £69,000) to support advice provision to carers and their families by Citizens Advice Sutton and Sutton Carers Centre. Citizens Advice Sutton to be the accountable body for the award, and funding shared with Sutton Carers Centre. | £201,000 |
| 18490 | Toynbee Hall | 22/02/2021 | 50,000 over one year towards the organisation's core costs and overheads. | £50,000 |
| 15638 | Transitions UK | 04/02/2021 | £75,000 over five years (£25,000, £20,000, £15,000, £10,000, £5,000) as a contribution towards the FT Project Manager and running costs for the Affirm Project in London. | £75,000 |
| 15936 | Trees for Cities | 22/02/2021 | £2,600 (6.5 days) to provide an eco-audit | £2,600 |
| 17974 | Vital Xposure | 26/01/2021 | £86,000 over three further and final years (£32,000; £29,000; £25,000) to continue Vital Xposure's work to develop and support d/Deaf and disabled artists in London to create art and culture. | £86,000 |

| Ref | Organisation | Disposition Date | Grant Recommendation | Recommended Amount |
|---------------------|--------------|------------------|---|--------------------|
| 18488 | Wac Arts | 23/02/2021 | £50,000 over six months towards the costs of core salaries, as identified in the application, together with some general running costs. | £50,000 |
| Grand Totals | | | | £2,814,699 |

Note: The following 9 grants were confirmed as approved after the main table above was compiled.

| Ref | Organisation | Recommended amount |
|---|--|--------------------|
| <u>Bridging Divides</u> | | |
| 18432 | Entelechy Arts Limited | £80,000 |
| 16066 | Green Street Green Association | £76,800 |
| 16942 | The Reader | £47,786 |
| 17986 | Causeway Irish Housing | £56,000 |
| 16035 | Hackney Music Development | £60,000 |
| 16051 | Lewisham Multilingual Advice | £71,100 |
| 15676 | Stonewall Housing Association | £100,000 |
| 18439 | Tower Hamlets Law Centre | £100,000 |
| <i>Total Bridging Divides (8 items)</i> | £566,026 | £591,686 |
| <u>Small Grants - Bridging Divides</u> | | |
| 17445 | Connection with North East London Gospel Mission. (Bridging Divides) | £29,320 |
| <i>Total Small Grants (1 item)</i> | <i>£29,230</i> | |
| Grand Totals (9 items) | £595,346 | £621,006 |

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| | |
|---|-----------------------------------|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Applications Recommended for Rejection | Public |
| Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain’s Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Decision |
| Report author: Scott Nixon, Head of Director’s Office | |

Summary

This report and the accompanying schedule outlines a total of **4** applications that, for the reasons identified, are recommended for rejection. All of these applications were under Bridging Divides criteria.

Recommendation

Members are asked to:

- Reject the grant applications detailed in the accompanying schedule

Main Report

1. The applications recommended for rejection at this meeting are listed within categories in the accompanying schedule. In each case the “purpose” that is used to describe the application is that provided by the applicant organisation. All the recommendations are based on criteria set out in your Policy Guidance.
2. Copies of these application forms are available electronically. If any Committee Member wishes to query any of the recommendations, this can either be done at the meeting, in which case the decision may be deferred while full details are provided to the Member concerned, or by contacting the Trust office in advance of the meeting so that an explanation can be provided prior to or at the meeting.

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Grants Recommended for Rejection

| Request Date | Ref | Organisation | Purpose | Reason for Recommendation for Rejection | Amount Requested | Funding Manager | Area |
|---|-------|------------------------------|--|---|------------------|-----------------|-------------|
| <u>Bridging Divides</u> | | | | | | | |
| <u>Connecting the Capital</u> | | | | | | | |
| May 2020 | 16557 | London Unemployed Strategies | Capacity-building for benefits claimants via peer support groups and training so they can support each other in expressing their needs effectively to people in authority. | The organisation's annual income is very low and its financial security is in doubt. As such the Trust would only be able to provide a very small amount of funding which would not help secure its future sustainability which, from the information currently available, is uncertain. | £160,058 | Lily Brandhorst | Camden |
| April 2020 | 16564 | Royal Parks Foundation | To engage a maximum of people, schools and local communities with ecological and gardening activities and learning to improve local environment. | An application that seeks £150,000 contribution over 3 years to a restoration project for Greenwich Park with a total project cost of over £7m. The request seeks funding for the Learning and Community Programme to be delivered around a new Learning Centre but the application detail focuses more broadly on the overall regeneration project and its outcomes rather than on the learning programme and is lacking in substantial detail on what this programme entails and the specific costs that are requested from the Trust - therefore a sufficient fit with your priorities cannot be determined. | £150,000 | Natalie Jordan | Westminster |
| <i>Total Connecting the Capital (2 items)</i> | | | | | £310,058 | | |

| Request Date | Ref | Organisation | Purpose | Reason for Recommendation for Rejection | Amount Requested | Funding Manager | Area |
|---|-------|--------------------------------------|--|--|------------------|------------------|-----------|
| Positive Transitions | | | | | | | |
| April 2020 | 16110 | Community Focus Inclusive Arts | To deliver a creative programme for 16-25 year olds who have mental health difficulties and/or additional needs, aiming to support and promote positive mental health and emotional wellbeing. | Based on the financial information provided by the applicant your officer has not been assured that the organisation's management of its finances is sufficiently robust. Accounts for 22019/20 show negative free reserves. | £98,909 | Matthew Robinson | Barnet |
| April 2020 | 16570 | Greenwich & Bexley Community Hospice | Increase the quality and quantity of social work support to Greenwich and Bexley's marginalised older terminally ill - giving them more choice and control at the end of their lives | While some of the proposed work falls within the Trust's aims, there is a bereavement support element that could end up constituting a significant component and the organisation does not hold a quality mark for the advice it offers - as is your requirement. If a grant were made it would have to be subject to several conditions; as it is, this proposal does not sufficiently meet the Trust's priorities. | £151,715 | Lily Brandhorst | Greenwich |
| <i>Total Positive Transitions (2 items)</i> | | | | | £250,624 | | |
| Grand Totals (4 items) | | | | | £560,682 | | |

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| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Withdrawn & Lapsed Applications | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Information |
| Report author: Scott Nixon, Head of Director's Office | |

Summary

This report informs Members of applications received which subsequently have been withdrawn by the applicant or lapsed due to the absence of the information required to undertake a full assessment.

Recommendation

Members are asked to:

- Receive this report and note its contents

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Withdrawn or Lapsed Applications

| ID | Organisation | Purpose of Request | Withdrawn / Lapsed Reason |
|------------------------------|--------------------------------|--|--|
| 16575 | Gospel Temple Apostolic Church | To enable older people, particularly those from the Caribbean community who may also be disabled, to actively participate in the arts such as learning how to sing gospel music. | The applicant has withdrawn its application with a view to submitting an application for an alternative COVID-19 safe project. |
| Grand Totals (1 item) | | | |

| | |
|---|-----------------------------------|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: Variations to Grants/Funds Awarded | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Information |
| Report author: David Farnsworth, Chief Grants Officer and Director of CBT (CGO) | |

Summary

This report informs Members of grants where variations have been agreed by the CGO since your last meeting.

Recommendation

Members are asked to:

- Receive this report and note its contents

Main Report

Since your last meeting, variation to the grant outlined below have been agreed by the CGO, in line with the revised delegated procedure for the amendment of grants as previously agreed by your Committee.

Whittington Park CA

On 19/06/2014 a grant of £4,380 was awarded to Whittington Park Community Association for the costs of an access audit and disability awareness and safety training. The access audit was duly commissioned, and those funds paid out in 2015, leaving a balance remaining of £1,500 for the training element. However, despite requests for updates/plans etc little information has been forthcoming and nothing since January 2020 – hence it is appropriate now that the balance is revoked.

Everyman Project

On 23/11/2017 a grant of £76,000 was awarded to Everyman Project for three years' funding of a project to support partners experiencing abusive relationships. The organisation was then one of very few which worked with perpetrators, so this project was to enable them to offer support to the victims of the perpetrators. However, when GDPR regulations came to the fore the organisation was unable to make

contact with those it wished to help so agreement was made with the Trust to amend the operation and some of the focus of the work. Throughout the second year of the grant changes within both the project and, especially, within the staff and trustee board became so frequent and significant that your officer deemed it impossible to continue to support the project as it had changed so fundamentally. As a result the organisation was informed that the third year's funding of £26,000 could not be released and would be revoked.

Camden Listening and Counselling Centre

On 25/09/2014 a grant of £4,900 over 3 years was awarded to Camden Listening and Counselling Centre for a project to analyse, develop and deliver a counselling project for young males. A small organisation, conditions relating to submission of a satisfactory budget were placed on release of the grant for years 2 and 3. The necessary paperwork was received at the end of year 1 and year 2 of the grant released – however not all of the necessary documents were received to release the year 3 payments, despite several attempts at chasing up. The year 3 payment of £1,500 has been revoked.

AGE UK Croydon

On 24/05/2016 a grant of £2,150 was awarded to Age UK Croydon to commission an independent access audit. The actual cost of the audit came in at £1,836 which was drawn down. The balance of £314 was therefore revoked.

St Andrew's Church Youth Centre, Roxbourne, Harrow

On 23/09/2015 a grant of £48,700 was awarded to St Andrew's Church Youth Centre, Roxbourne, Harrow for access related capital works as part of a refurbishment of the premises including the community hall. Despite several chase-ups over the years no funds have ever been drawn down and so the full grant of £48,700 has been revoked.

St John's Church, Waterloo

On 25/09/2014 a grant of £4,800 was awarded to St John's Church, Waterloo to commission an independent access audit. The actual cost of the audit came in at £3,600 and was paid, so the balance of £1,200 has been revoked.

Blackfriars Settlement

On 28/01/2016 a grant of £39,000 was awarded to Blackfriars Settlement to provide entry-level ESOL classes over two years. The first year's payment of £19,500 was drawn down. However, when the time came for an end of year monitoring report and related documents to be provided none were forthcoming. Several attempts were made by different officers to get the documents but to no avail. The second year's funding of £19,500 has been revoked.

Institute of Contemporary Arts

On 24/11/2016 a grant of £5,000 was awarded to Institute of Contemporary Arts for independent access consultancy prior to planned redevelopment work. Early consultation work was undertaken at a cost of £1,500 which was claimed and paid. The organisation had promised to update on the drawdown of the balance by late 2018 but nothing more happened. The balance of £3,500 has now been revoked.

Together for Mental Wellbeing

On 24/05/2016 a grant of £111,270.00 was awarded to Together for Mental Wellbeing for the salary of a f/t Peer Support Coordinator and related costs of a peer support programme in liaison and diversion services in North and West London. At the start for the grant there were significant delays in recruiting the Peer Support Coordinator which went on for several months. This led to an underspend overall of £27,635 which has been revoked.

Sport & leisure Management Ltd

On 31/01/2018 a grant of £10,000 was awarded to Sport & Leisure Management Ltd (as the parent body of Everyone Active) as part of the joint funding initiative to support organisations providing services for the Grenfell community after the disaster. The grant was to support the costs of providing a Community Sports Activator for local young people during subsequent school holiday periods. Despite several attempts to get the organisation to draw the funds down it has still failed to do so. Now that three years has passed since the grant was awarded it has been revoked.

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| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: London Community Response Fund Grants Approved under Delegated Authority – Wave 5. | Public |
| Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | London Communities Response Fund budget |
| Has this Funding Source been agreed with the Chamberlain’s Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Information |
| Report author: David Farnsworth, Chief Grants Officer and Director of CBT (CGO) | |

Summary

This report advises members of funds awarded through The London Community Response Fund (LCRF) under delegated authority for wave 5 of the London Community Response (LCR) Funders’ Collaborative. This report does not include awards previously reported to this committee.

Recommendation

Members are asked to:

- Receive this report.

Main Report

1. As you may remember, the LCRF is an emergency response fund administered by CBT. Grants are awarded using both funds donated by other funders and CBT’s own funds.
2. LCRF applications are submitted on a common portal which is coordinated by London Funders. Applications are then sifted by a group of 100 grants managers from across the funding sector. Applications are then further assessed by CBT Funding managers, freelance assessors and staff from other funders.

3. Recommendations are made by an Advisory panel comprising of officers from a range of donating funders and independent experts. These recommendations are then reviewed and approved by your CGO and Deputy CGO under the agreed powers of delegation.
4. Funding has been awarded in targeted waves. Waves 1, 2, 3 and 4 have already been reported to this committee.

List of grants awarded, LCRF, Wave 5

| Organisation Name | Grant Amount |
|--|--------------------|
| Community Accountancy Self Help | £37,655.00 |
| I AM IN ME Community Interest Company | £7,500.00 |
| ST MARGARET TEH QUEEN PCC | £33,600.00 |
| West London Equality Centre | £48,195.00 |
| The OK Foundation | £12,600.00 |
| Refugees in Effective and Active Partnership | £25,000.00 |
| Hounslow Community Association Ltd | £18,000.00 |
| Chaos Theory | £35,000.00 |
| Revert2Reality | £22,225.00 |
| Carnaval del pueblo Asociación | £20,000.00 |
| Turning Corners | £10,160.00 |
| Afghan Association of London (Harrow) | £15,000.00 |
| Stitches in Time Ltd | £34,620.00 |
| Girls Rock London | £27,837.00 |
| Open Barbers C.I.C | £29,125.00 |
| Xenia | £13,444.00 |
| ALAG (Asperger London Area Group) | £15,000.00 |
| Celestial Church Of Christ, Voice Of Jesus Christ Ministries | £8,380.00 |
| TOTAL | £413,341.00 |

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|---|-----------------------------------|
| Committee | Dated: |
| City Bridge Trust (CBT) | 25th March 2021 |
| Subject: City Bridge Trust Communications & Events Attended | Public |
| Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain's Department? | N/A |
| Report of: Chief Grants Officer and Director of CBT (CGO) | For Information |
| Report author: Catherine Mahoney - Communications Manager, Charity and Philanthropy | |

Summary

This paper provides members with an update on the communications work of City Bridge Trust (CBT).

Recommendation

Members are asked to:

- Receive the report and note its contents.

Main Report

Key Audience Group Reporting

1. Appendix 1 reports communications activity between 01/01/2021 and 05/103/2021 against some of the audiences identified in the communications vision. This shows continued levels of engagement against our audiences.
2. Appendix 2 provides a detailed breakdown of the media activity supporting delivery of the communications vision during this period, led by Tim Fletcher.
3. Some of the grants awarded during this unusual period were covered in several media outlets. This includes grants awarded under both Bridging Divides and the London Community Response Fund. Great coverage was achieved, from BBC Radio London and BBC News to local outlets such as the Southwark News, Inside Croydon and the South London Press. The Ability Bow grant received great coverage on BBC TV London lunchtime and

evening news. Extensive coverage of a grant to The Cares Family included a piece on BBC Radio London's Vanessa Feltz show (link expired).

4. The launch of the Beacon report, which calls for action to make the UK a global philanthropy hub, was covered in the Times and Times radio.
5. In total, we received 50 items of media coverage, 40 of which were generated from news releases, eight news releases were issued.
6. Members and Officers were able to virtually attend a few several seminars and events and some details are outlined in Appendix 3.

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Appendix 1: Key Audience Groups

Appendix 1: Key Audience Groups

| Audience | | 'Face to face' | Online and Printed Media channels | Online content |
|--------------------------|--|---|---|--|
| Londoners | | <ul style="list-style-type: none"> London Funders London Plus, London Boroughs Faith Network | <u>Brent and Kilburn Times</u> <u>London Post</u> <u>City Matters</u> <u>London Post</u> <u>London News Online</u> <u>London Post</u> <u>City Matters</u> <u>Southwark News</u> <u>Southwark News</u> * <u>South London Press</u> * <u>Brixton Blog</u> | CBT Twitter: <ul style="list-style-type: none"> 8988 followers 15k impressions* CBT Website: <ul style="list-style-type: none"> 1.2k users 1.6 sessions 2 mins and 33s average time |
| Regulators & politicians | | <ul style="list-style-type: none"> GLA London Transition Board Centre for Social Justice | <u>The Times</u> | n/a |

| Audience | | 'Face to face' | Online and Printed Media channels | Online content |
|---|--|--|--|---|
| Immediate stakeholders** | | <ul style="list-style-type: none"> Beacon Collective | <ul style="list-style-type: none"> Charity Today FE News Civil Society UK Fundraising Charity Today | <ul style="list-style-type: none"> News items on the CoL intranet and e-bulletin. Regular updates in the Members' Briefing. |
| Other funders, policy makers & key commentators | | Meetings & events with various funders including: <ul style="list-style-type: none"> Cripplegate Foundation | <ul style="list-style-type: none"> The Times The Guardian Civil Society | n/a |

* An Impression is the number of times CBT tweets have been delivered to other accounts and potentially viewed. ** Includes CBT & CoL Officers & Members; key infrastructure bodies; grantees; potential grantees; City leaders, workers, Human Resource and Corporate Social Responsibility professionals

Appendix 2 – Media Coverage

| Media Coverage – 14 January to 9 March 2021 | | | | | |
|---|-------|---|---|----------|--|
| Fund | Date | Story link | Subject | Audience | From news release |
| City Bridge Trust | 14/02 | Brent and Kilburn Times | Coverage of a £68,000 City Bridge Trust grant for Cricklewood-based charity Ashford Place's dementia helpline. Chairman of the City Bridge Trust Committee Dhruv Patel is quoted. | Local | New dementia service offers 'lifeline' to people in Brent (Jan 14) |
| | 14/02 | London Post | | London | |
| | 18/02 | City Matters | | City | |

| Media Coverage – 14 January to 9 March 2021 | | | | | |
|---|-------|--------------------------------------|--|------------|---|
| Fund | Date | Story link | Subject | Audience | From news release |
| City Bridge Trust | 19/01 | Inside Croydon | A £148,500 City Bridge Trust grant to Croydon-based mental health charity Hear Us will help twice as many people manage their finances, access benefits and maintain vital social contact. Dhruv Patel is quoted. | Local | Boost for mental health service which gives people hope (Jan 22) |
| | 22/01 | City Matters | | City | |
| | 22/01 | Charity Today | | Specialist | |
| | 22/01 | London Post | | London | |
| City Bridge Trust | 28/01 | Fitzrovia News | Reports on a new housing and welfare advice service for residents in Fitzrovia with funding from City Bridge Trust. Dhruv Patel is quoted. | Local | |
| City Bridge Trust | 29/01 | London Post | Dhruv Patel is quoted in reports on a £70,500 City Bridge Trust grant to Stockwell-based Oasisplay for environmental play sessions for children. | London | Kids get muddy and learn in South London green 'oasis' (Jan 29) |
| | 29/01 | FE News | | Specialist | |
| | 03/02 | City Matters | | City | |
| Featured story: | | | | | |
| City Bridge Trust | 03/02 | London News Online | Extensive coverage of a £135,000 City Bridge Trust grant to The Cares Family for a project pairing up lonely older and younger people. Dhruv Patel is quoted. Coverage includes a piece on BBC Radio London's Vanessa Feltz show (link has expired). | Local | Bridging the generation gap to help lonely Londoners (Feb 3) |
| | 03/02 | London Post | | London | |
| | 04/02 | City Matters | | City | |
| | 05/02 | Southwark News | | Local | |
| | 10/02 | BBC Radio London | | London | |
| | 11/02 | Southwark News * | | Local | |
| | 12/02 | South London Press * | | Local | |
| | 15/02 | Brixton Blog | | Local | |
| City Bridge Trust | 09/02 | The Times * | | National | |

| Media Coverage – 14 January to 9 March 2021 | | | | | |
|---|-------|--|--|------------|--|
| Fund | Date | Story link | Subject | Audience | From news release |
| | 09/02 | Civil Society | Coverage of the launch of a new report by the Beacon Collaborative, supported by City Bridge Trust, which calls for action to make the UK a global philanthropy hub. | Specialist | |
| | 09/02 | City AM | | London | |
| City Bridge Trust | 10/02 | City Matters | City Bridge Trust is mentioned in an opinion piece which argues that civil society is the most underrated sector in the UK's property market. | City | |
| City Bridge Trust | 11/02 | UK Fundraising | City Bridge Trust is included in a list on of funders that have signed a pledge to be open & trusting in their grant-making. | Specialist | |
| Bridge House Estates | 14/02 | The Guardian | Bridge House Estates is mentioned in a story about the following a number of bridges needing maintenance work in London. | National | |
| Featured story: | | | | | |
| City Bridge Trust | 15/02 | Charity Today | Coverage of an £89,200 City Bridge Trust grant to East End gym Ability Bow includes a piece on BBC London News (TV) featuring an interview with CBT communications manager Cathy Mahoney. Dhruv Patel is quoted in online stories. | Specialist | Covid no barrier to East End gym helping disabled people stay fit (Feb 12) |
| | 17/02 | THIS | | Specialist | |
| | 17/02 | Access & Mobility Professional | | Specialist | |
| | 24/02 | Access & Mobility Professional | | Specialist | |
| | 04/03 | BBC London News * | | London | |

| Media Coverage – 14 January to 9 March 2021 | | | | | |
|---|-------|---------------------------------------|--|------------|---|
| Fund | Date | Story link | Subject | Audience | From news release |
| Featured story: | | | | | |
| City Bridge Trust | 19/02 | London Post | Reports, including on <i>BBC Radio London</i> , of a £225,000 City Bridge Trust grant to Islington-based charity Hillside Clubhouse, to help people with mental health issues get back to work and achieve their potential. Dhruv Patel is quoted. | London | Mental health Clubhouse puts members in the driving seat (Feb 19) |
| | 22/02 | City Matters | | City | |
| | 24/02 | Islington Gazette | | Local | |
| | 24/02 | FE News | | Specialist | |
| | 24/02 | BBC Radio London * | | London | |
| City Bridge Trust | 23/02 | Horticulture Week (£) | Dhruv Patel is quoted in coverage of a £48,000 City Bridge Trust grant to Triangle Adventure Playground, in Lambeth, for a scheme which helps children learn about the natural world and grow their own food. | Specialist | Green-fingered kids go wild as healthy food scheme is extended (Feb 23) |
| | 23/02 | London Post | | London | |
| | 24/02 | City Matters | | City | |
| | 25/02 | Charity Today | | Specialist | |
| | 25/02 | South London Press * | | Local | |
| | 26/02 | South London Press | | Local | |
| City Bridge Trust | 01/03 | BBC Radio London * | Coverage of a City Bridge Trust-funded digital project, Giving Voice, run by the Pascal Theatre Company and aimed at helping isolated women during lockdown. | London | |
| City Bridge Trust | 03/03 | The Voice | A story about the Moving On Up programme, a Trust for London initiative, working with City Bridge Trust and Black Training and Enterprise Group to assist young black men with job opportunities in Brent. | Specialist | |

| Media Coverage – 14 January to 9 March 2021 | | | | | |
|--|-------|---|---|------------|---|
| Fund | Date | Story link | Subject | Audience | From news release |
| City Bridge Trust | 04/03 | London Post | Coverage of a £246,000 City Bridge Trust grant to Kiln Theatre in Kilburn, to support its work helping young people, including refugees and asylum seekers, build their confidence and immerse themselves in the arts. Dhruv Patel is quoted. | London | Young people helped to make their voice heard through theatre (Mar 4) |
| | 04/03 | FE News | | Specialist | |
| | 04/03 | Theatre Weekly | | Specialist | |
| | 04/03 | City Matters | | City | |
| | 05/03 | Charity Today | | Specialist | |
| | 05/03 | Brent & Kilburn Times | | Local | |
| LCRF City Bridge Trust | 07/03 | Film News | The London Community Response Fund and City Bridge Trust are referenced for their support for the charity Birds' Eye View, for a project aimed at engaging disadvantaged communities through film. | Specialist | |
| * = viewable / listenable internally only £ = paid / subscription-only content | | | | | |

CITY BRIDGE TRUST

External Events attended 1 Jan – 5 March 2021

| Date | Host Organisation | Type of Event | City of London's Representative | Summary |
|-------------|--|----------------------|--|--|
| 14/01/2021 | London Plus, London Boroughs Faith Network | Volunteering Summit | Fiona Rawes, Karen Mangan, Alice Hall | Pan-London summit for stakeholders involved in delivering volunteering, including voluntary sector organisations and local authorities |
| 09/02/2021 | Beacon Collaborative | Report launch | Fiona Rawes, Alison Gowman, Catherine McGuinness | REPORT LAUNCH: The UK as a Centre of Excellence for International Philanthropists and Social Investors (Roundtable) |
| 10/02/2021 | London Councils | Meeting | Dhruv Patel | Grants Executive Meeting |
| 01/03/2021 | Kusuma Trust | Meeting | Dhruv Patel | Meeting with this philanthropic organisation working in the UK, India and Gibraltar. |
| 05/03/2021 | London Funders | Cornerstone Workshop | Jenny Field | Workshop for potential applicants. |

| Date | Host Organisation | Type of Event | City of London's Representative | Summary |
|-------------|--------------------------|----------------------|--|--|
| 09/03/2021 | Beacon Collaborative | Council meeting | Fiona Rawes | Beacon Collaborative Organisations Council meeting |
| 21/03/2021 | Rocket Science | Meeting | Dhruv Patel, Giles Shilson | Review meeting for BD strategy |
| 24/03/2021 | Cripplegate Foundation | Board meeting | Jenny Field | Board meeting |

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|---|-----------------------------|
| Committee(s) | Dated: |
| City Bridge Trust Committee | 25 th March 2021 |
| Subject: Grief Encounter: Learning Case Study | Public |
| Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly? | N/A |
| Does this proposal require extra revenue and/or capital spending? | N |
| If so, how much? | N/A |
| What is the source of Funding? | N/A |
| Has this Funding Source been agreed with the Chamberlain’s Department? | N/A |
| Report of: Chief Grants Officer & Director of City Bridge Trust (CGO) | For Information |
| Report author: Jen Durrant, Impact and Learning Officer | |

Summary

This paper is a learning case study about Grief Encounter, an independent charity that exists to support children and young people who have suffered the loss of a parent or sibling, and a current grant holder. The case study aims to understand the challenges Grief Encounter has faced during Covid-19, how they have adapted and what City Bridge Trust (CBT) and others can learn from their example.

Recommendation

- a) For Members to read the case study and consider the learning for City Bridge Trust.

Main Report

Introduction

1. This is the fifth learning case study demonstrating the issues faced during Covid-19 by organisations you support and highlighting ways they are adapting their services and approaches. The purpose of these case studies is to identify good practice that CBT, and others, can learn from during this crisis period and as the sector starts to rebuild.
2. This case study focuses on Grief Encounter, which you awarded £132,800 over three years in September 2019 under Bridging Divides’ Positive

Transitions Programme. In August 2020 they took up the offer to convert £43,522 project funding to core costs over 12 months.

What made Grief Encounter unique before the crisis?

3. Approximately one in 20 young people experience the death of one or both of their parents before their 16th birthday (Parsons, 2011). Bereaved children are vulnerable to serious mental health problems including depression, addiction and suicidal thoughts. There is no statutory provision of specialist therapeutic support for bereaved children and there is a shortage of mental health support more generally for children, who often have to wait many months before receiving help.
4. Since 2003, Grief Encounter has been providing free early intervention therapeutic services to help children, young people and their families to address their grief and mitigate future problems associated with bereavement. Their uniquely broad range of services includes: one-to-one weekly art and drama therapy sessions delivered by qualified grief counsellors, child-focused workshops, family fun days, group therapy split into age appropriate sets, a residential trip for families, Grief Relief Kits filled with useful tools for children to process bereavement and a telephone helpline.

How has Covid-19 affected Grief Encounter?

5. As a result of the pandemic the need for Grief Encounter's services has both increased and become more complex: lockdown has disrupted funerals, cut children and families off from their usual support networks, intensified the pressure on family relationships, prevented them from spending time with dying loved ones and exposed bereaved children to a constant focus on death in the media and wider conversations. This had led to unprecedented levels of demand for Grief Encounter's helpline and counselling services, and means the difficulties facing each child have become more complex.
6. In addition, the pandemic has been very challenging for Grief Encounter financially; much of its income generation depends on a biannual gala dinner with 900 guests, which had to be cancelled.

How did Grief Encounter adapt its provision?

7. Grief Encounter responded quickly, transferring their counselling services to online almost overnight. They prioritised the most vulnerable children who were suffering from self-harm and suicidal thoughts, and worked with their network of schools, GPs, social services and other charities to ensure children and families received the support they needed. The counsellors developed creative ways to facilitate art and drama therapy online, and also created group discussion sessions for teenagers. Engagement and feedback from children and families has been very positive.
8. The charity has been working to raise awareness of their webchat and telephone helpline, so that more children can access support in that way.

They have also led sessions for teachers on how to help bereaved children return to school after lockdown.

9. To meet the financial challenges, the fundraising team have proactively sought new sources of funding and adapted their relationships with donors, diversifying their income streams to include a patronage programme, corporate partnerships and other grants. This has enabled them to continue providing their services and improved their financial sustainability.

What made Grief Encounter particularly resilient during Covid-19?

10. Recognising the extra challenges they faced, with increased demand, the switch to online and the difficulties of working from home, Grief Encounter invested in their staff: they provided additional training and increased support and supervision for their counsellors. This improved staff's emotional resilience and in turn enabled them to be more creative, try things out and develop a successful online counselling service.
11. Their existing networks and commitment to collaboration – with a range of public and third sector support agencies – meant they were able to meet the increased levels of demand, learn from others and connect those who needed it to additional sources of support. They sought out feedback and advice from the families they help, their counsellors and other organisations to better understand needs and develop their services.
12. Financially, the support of CBT has been pivotal: for providing longer-term security of income over three years, for covering a core salary so the fundraising team can focus on generating income for counselling sessions and for adding credibility to their applications to other funders. Converting the project funding to core costs was also hugely important in enabling them to set up and improve their online services.

What can City Bridge Trust learn from Grief Encounter?

13. Grief Encounter's effectiveness and sustainability has in part been due to their collaboration with other agencies and their investment in staff resilience; CBT could consider supporting other organisations to implement a similar approach. In addition, their recognition of the importance of staff resilience shows the relevance of the work officers are undertaking to develop the Responding to the Resilience Risk 2 (RRR2) initiative. Resilience is a key issue for the organisations CBT supports, and being at the forefront of research in this area positions CBT well to meet the sector's needs in the future.
14. The example of Grief Encounter shows the value of providing funding over a period of at least three years, and of the offer to convert this to core costs during the pandemic. Going forward, CBT should continue to provide multi-year funding security and responsive flexibility for organisations.

15. One of the biggest challenges Grief Encounter faces is that bereaved families are largely unaware of the support available to them, particularly their helpline. CBT could consider if and how it could have a role to play in helping raise awareness of the services that funded organisations provide.

Jen Durrant

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