

Committee: City Bridge Trust (CBT)	Dated: 7 September 2018
Subject: Progress Report	Public
Report of: Chief Grants Officer (CGO) and Director of CBT	For decision

Summary

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

- Cornerstone Fund
- Cornerstone Fund evaluation
- Total Assets
- Stepping Stones
- Learning Partner
- Philanthropy Strategy
- Civil Society Strategy
- Mayor of London's Young Londoners Fund
- Implementation of Bridging Divides
- HR update
- Islington Giving training young people's grant panel

Recommendation

- a) That the report be noted.
- b) To approve non-grant funding from the Cornerstone Fund of up to a maximum of £80,000 over two years for a Learning Partner.
- c) To agree that any decisions to allocate individual sums for the Mayor's Young Londoner's Fund prior to your next meeting in November be delegated to the Town Clerk in consultation with the Chairman and Deputy Chairman and to be reported to the subsequent Committee.

Main Report

Introduction

1. You will recall that you have agreed that each of the CBT Committee Meetings will begin with a presentation on a particular aspect of the work you support. Rosie Ferguson, CEO of Gingerbread has been invited to this committee. Gingerbread was awarded funds in 2017 to undertake research on the needs of single parent families in London and how services could be provided to best meet those needs. This research will be completed in November 2018 and will be built on a robust evidence base, amplifying the

voices and experiences of single parents most in need, including those more disadvantaged families in the capital who Gingerbread haven't historically reached.

Cornerstone Fund

2. As reported at your last meeting, the Cornerstone Fund (the additional funding of £3m that was approved to establish a strategic fund for civil society infrastructure support of which £2.8m remains) Funders' Panel¹ met on 11th July 2018.
3. You may recall this has a two-stage application process. The panel met to discuss the Stage 1 applications and to decide which applications should be recommended to receive grants to develop their bid to Stage 2. The applicant will then follow the application process of whichever funder considers a particular proposal best aligns with their interests.
4. Of the 21 applications received, only one had completely failed to address the published criteria and outcomes. Of the remaining 20, 11 were considered strong enough to go through to Stage 2, one of which does not need a development grant. The remaining 10 will receive grants of up to £20,000 which have been approved by Delegated Authority² and are reported elsewhere in your papers today. You will see this report indicates which funder is likely to consider which Stage 2 application.
5. Approval of the 10 which were recommended for rejection was made by Delegated Authority as well as a schedule of these can also be found elsewhere in your papers today.
6. It is anticipated that the Stage 2 applications that are to be recommended for funding by City Bridge Trust will be brought to your Committee Meeting either in November 2018 or in January 2019.

Cornerstone Fund evaluation

7. The Cornerstone Fund Reference Group and Funders' Panel proposes that a Learning Partner is appointed to work alongside the successful applicants and the group of aligned funders over a two-year period, in order gain an understanding of 'what works' and the extent to which the projects that have been supported are scaleable/replicable. The evaluation will also look at the funding model and how the funders have worked together, as well as the extent to which the Cornerstone Fund has successfully brought about systemic change within how civil society support organisations work.
8. Given the number of days that are likely to be needed for this evaluation, it is recommended that you approve non-grant funding from the Cornerstone Fund of up to a maximum of £80,000 over two years for a Learning Partner

¹ comprising representatives from Big Lottery Fund, Trust for London, Mercers Company, John Lyons Charity, Cripplegate Foundation, Greater London Authority, London Councils and London Funders

² Decisions on applications of up to £10,000 may be approved by the Chief Grants Officer. Decisions on applications of over £10,000 and up to £25,000 may be approved by the Chief Grants Officer in consultation with the Chairman and Deputy Chairman.

(Tenders will be invited in the range of £60,000 - £80,000 over two years). The Learning Partner would be appointed through the City of London Corporation's standard procurement process.

Total Assets

9. Bridging Divides commits you to using all of the assets, financial and non-financial, of both CBT and the CoLC (as trustee of the underlying charity) as part of CBT's 'toolbox' to support applicant organisations. Proposals for the first phase of a Funder Plus offer are provided separately in your papers today and would also form part of the toolbox.
10. Noa Burger, who until July 2018 was Head of Responsible Business within the Economic Development Office, is currently working for us in a freelance capacity for a fixed number of days to assist us with a number of tasks. These include helping us to analyse, categorise and collate what our total assets are, including our more 'unusual' assets, so that we can make this information available both internally and externally in a user-friendly format.
11. Noa is also designing a questionnaire for CBT grantees to explore what areas of organisation life they would welcome support with and what barriers or obstacles there might be to receiving support. The feedback will help to inform the proposed Phase 1 Funder Plus offer; the total assets offer; as well as the CoLC's employee volunteering offer.

Stepping Stones

12. City Bridge Trust worked alongside employee volunteers from UBS during July to assess applications received through the fifth round of Stepping Stones, your social investment readiness grant programme. 35 applications were received and 19 were asked to provide full proposals, at levels equivalent with previous rounds. Full assessments are ongoing and recommendations for both funding and rejection will be put in front of an approval panel involving the Chairman, Deputy Chairman, senior UBS representative and the Chief Grants Officer at a meeting on 13th September. Details of all organisations funded will be provided to your November Committee meeting along with proposals to make Stepping Stones a rolling programme similar to other City Bridge grant-making in order to improve ease of application.
13. Meanwhile, City Bridge Trust and UBS' Stepping Stones work has been shortlisted for a Charity Times award under the social investment category. The awards take place in early October and the Trust expects to attend with colleagues from UBS who, like us, are delighted to be shortlisted.

Learning Partner

14. We continue to work with Renaisi, our learning partner for the Bridging Divides strategy. Renaisi has already held two workshops for the Trust staff team and plans to meet Members at your strategy half away-day. The partner is preparing several papers which may be of interest to Members, including guidance on how best to measure the progress we make towards achieving our mission of reduced inequality and stronger communities.

Philanthropy Strategy

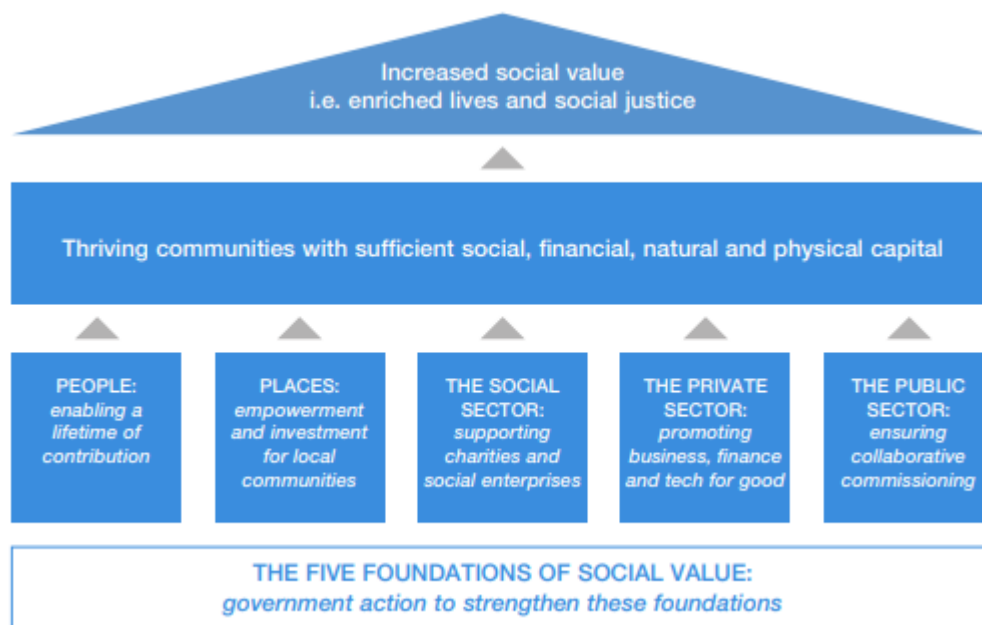
15. You approved the Philanthropy Strategy at your May meeting and, as it is a cross-organisational strategy encompassing both CBT and the CoLC, it was subsequently approved by both the Policy and Resources Committee in June and by the Court of Common Council in July.
16. You will recall that the Strategy has 3 pillars to achieve its vision to ensure that, as a result of higher impact and higher value philanthropy, individuals and communities thrive, especially those experiencing disadvantage and marginalisation. The pillars are:
 - a) The CoLC and CBT role model high impact Philanthropy contributing to a reduction in inequality and/or an increase in social mobility;
 - b) Higher impact and/or higher value Philanthropy is generated from others as a result of CoLC and CBT's support for the philanthropic infrastructure;
 - c) Key audiences are better equipped to generate higher impact and/or higher value Philanthropy as a result of CoLC and CBT's awareness raising activity about it.
17. Work is currently underway to build the implementation plan which will come to your Committee for review in November 2018.
18. Notwithstanding the development of the implementation plan, we have wanted to be nimble in identifying and responding to opportunities as they arise. Under pillar 2, we therefore secured your support for the 'Philanthropy House' concept (subject to further clarification on costings and legalities). As the committee is aware, there are also range of events taking place in September to reflect the awareness raising focus of pillar 3, namely:
 - a) the launch of the Centre for London's Giving Research at the Guildhall on the 3rd of September with CPR providing the welcoming speech. Fiona Rawes and Jenny Field have been on the steering committee for this research in which the work of CBT and the CoLC more broadly is warmly credited.
 - b) the 3-day Global Donors' Forum for the World Council of Muslim Philanthropists on 10-12 September with an evening reception at the Mansion House on 11th September with Alderman Alison Gowman providing the welcome as the Lord Mayor's Aldermanic Representative. An audience of 300 is expected for the forum and CBT will contribute to 2 sessions; one on learning from Grenfell Tower (chaired by Professor Diana Leat, and featuring London Funders, Muslim Aid and the Al Manaar Cultural Heritage Centre alongside CBT) and the other on social investment learning (chaired by Paul Palmer of Cass Business School, and featuring UBS, the Al Zakkat Foundation and CBT).
 - c) The launch of the CoLC's own research on barriers and drivers to higher impact giving by the Financial and Professional services sector at the

Mansion House on 24th September as a precursor to City Giving Day on the 25th September.

19. Pillar 2 envisages funding and other support for the philanthropic infrastructure. This sits neatly within the 'Connecting the Capital' strand of your Bridging Divides Strategy which includes support for infrastructure or 'second tier' organisations. In preparation for 'philanthropic' spend within the Connecting the Capital strand, we will be working through the detail as part of the implementation plan and further developing the website content to reflect this philanthropic focus. We will of course keep your Committee apprised of the changes. In the meantime, we are staying close to high potential initiatives which have been developing over the last year.

Civil Society Strategy

20. The Government published its [Civil Society Strategy](#) on 9 August 2018. This strategy aims to create 'thriving communities' through strengthening 'five foundations of social value'.



21. It highlights the vital importance of a thriving, diverse civil society, which enriches lives and creates a fairer society for all broadly under the following headings:
- a) People - The aim here is to give people a sense of control over their future and their community, and to support them in taking action on the issues they care about.
 - b) Places - The strategy aims to create places where local communities are empowered and take responsibility for where they live. As well as enhancing existing opportunities such as community rights, there are some interesting new commitments.
 - c) The social sector – The strategy's focus is to ensure charities and social enterprises are confident about their right to speak up and have a strong role in shaping policy.

- d) The private sector - The strategy seeks to build further initiatives and support for responsible businesses, those which put social and environmental responsibility at the heart of what they do.
- e) The public sector - The aim here is to ensure collaborative commissioning, so local players are involved in a meaningful way in creating and delivering public services.

Mayor of London's Young Londoners Fund

22. Your officers have continued to assist the GLA with the processing of applications to the Mayor of London's fund to support young people's activities. James Lee and Jack Joslin have undertaken some online assessments whilst Ciaran Rafferty has taken part in a panel at City Hall to consider Small Grant applications and, later this year, will also be part of panels to review requests for larger grants. Once the Small Grant recommendations have been approved by the Mayor's team those organisations will be advised accordingly, with a view to their projects then commencing from late October onwards. The projects awarded larger grants are scheduled to commence in January 2019.

23. With regard to the £1m provided by the Trust for wrap around support to the funded organisations, your officer has been busy in negotiating with the GLA and with a range of specialist providers. The Young Londoners Fund will support activity over the next three years and your support programme will follow the same timeframe so not all of the funds will be allocated immediately.

24. Estimates for the allocation of your funds in the first 18 months (Oct 2018 – March 2020) are as follows:

Staff Training Courses/Programmes*	£120,000
Ongoing counselling/wellbeing support	£100,000
Staff/Project networks (via the GLA)	£100,000
Support for London Youth Quality Mark	£130,000

(* likely to be via more than one provider)

25. It is important at this stage that there is some flexibility in these allocations as the detail of need will not be known until all grants for the period are awarded by the GLA and a more robust needs analysis can then be undertaken. Consequently, it is advised that if any individual sums are to be allocated prior to your next meeting in November that approval be delegated to the Town Clerk in consultation with the Chairman and Deputy Chairman and to be reported to the subsequent Committee.

Implementation of Bridging Divides

26. On 26 July, CBT hosted the grant-making teams from BIG Lottery London and Trust for London. This proved a valuable opportunity to share knowledge on each organisations' respective strategy development and implementation. The sessions were attended by over 40 people from across all three

organisations with networking opportunities before and after the event. It is hoped that these joint learning sessions will become regular events.

HR update

27. The job evaluation process, which was undertaken so as to standardise and update the job descriptions of existing CBT staff and evaluate the new posts that have been created, has now been completed (except for the Head of Chief Grants Officer's office and Corporate Charity Business manager which is still undergoing evaluation).
28. The recruitment process will now commence for all of the roles below, with closing dates set for mid-September. A further update will be provided at your November Committee
 - a) Business Support Manager
 - b) Executive Assistant
 - c) Head of Central Grants programme
 - d) Head of Impact and Learning
 - e) Central Grants Funding officer

Islington Giving Young Grantmakers Programme update

29. The Young Grant Makers (YGM) programme is a one-year pilot delivered in partnership with Youth Bank International (YBI) with weekly sessions between May and December 2018. YGM has a grant budget of up to £80,000 with delegated authority to make decisions and awards up to the value of £15,000.
30. YBI have developed and delivered young grant making programmes in multiple countries and have a strong guiding framework that allows different groups to pick up the model and adapt for their particular circumstances. Islington Giving's (IG) programme team works closely on all aspects of the YGM programme to ensure IG requirements and expectations are at the forefront, to allow the team to learn and share learning within the team and with other interested funders.
31. Kate Moralee, Grants Officer and a member of Islington Giving's Grants Panel, was invited to attend a training session with the young grant makers devoted to "understanding what success looks like for different stakeholders in the programme". The session was well attended by a diverse group of 8 young people (even though it was the same evening as an England world cup game). The young people were fully engaged with the programme, had attended regularly and demonstrated a good understanding of their role, through the questions they asked and the feedback they gave about previous sessions. The session was led by YBI and supported by a peer facilitator (a young person who had previously been through the training).
32. Kate and another member of the Grants Panel were asked to share their views on what success would look like for IG grant panel. The young people then asked questions on governance – full decision-making process, accountability and the source of the money awarded in grants. The young

people were very interested in the history of CBT, its governance and decision-making processes, which are very different to those of Islington Giving.

33. The young people were then asked to discuss their own criteria for “success” of the programme from the perspective of grant making and the grantees, which would be further refined during the consideration of expressions of interest submitted. The young people have previously delivered an evening of funding surgeries where they spoke to applicants about the programme, how to make an application, and the criteria for the programme. They will go on to look at other criteria against which they will measure success, specifically relating to success for those individuals taking part in the programme, at a future session.

Bridge to Work network meeting

34. On the 18th August your officers held the most recent of the quarterly network meetings for the Bridge to Work programme. The Deputy Chairman attended and warmly welcomed those present. These meetings are attended by all of the grantees who are in receipt of funding through Bridge to Work and provide an opportunity for conversation and collaboration amongst grantees and relevant external organisations that are invited. The meeting was also attended by grantees of the Bridging Divides funding programmes who are delivering work of relevance, such as Scope and the Royal Society for Blind Children.
35. We were pleased to hear from Frances McAndrew, the Diversity and Inclusion Lead at Transport for London (TfL). Frances spoke about the steps that TfL are taking to improve opportunities for disabled people to join and progress within their workforce of 28,000 staff. Frances noted that whilst they have doubled the number of disabled employees (from 2% to 4%) in the past two years, she recognises that there is still a lot of work to be done. She also mentioned a point of learning for colleagues across the City of London Corporation with regards to the Staff Diversity Networks at TfL, which have many subgroups relating to specific needs and utilised in a manner akin to a business resource group. For example, a subgroup looking at adjustments plays a significant role in reviewing staff policies in relation to reasonable adjustments.
36. Other external guests included Venla Freeman and Russel Knight from the Prince’s Trust, who delivered a presentation on their employability support offer for young people that is funded by the Trust. Your officers recognise that the efficacy of the Bridge to Work programme is strengthened by collaborative working and a coming together of the various strands of work which are supported across the City Bridge Trust’s portfolio of grants. There is already common ground between these two initiatives and great scope to build further on that.
37. Finally, we heard from Karen Mitchell of The Shaw Trust, an organisation that is delivering the Work and Health Programme in West London on behalf of the Department for Work and Pensions. The Work and Health Programme is a

Government initiative designed to help disabled people find and sustain work. It was of great value to hear of the approach to providing support and the long history of quantitative data which underpins the design of the Programme. Bridge to Work aims to foster a spirit of collaboration and to share learning not just between your grantees but across all sectors, including government departments.

38. The next Bridge to Work network meeting is scheduled for Monday 10th December from 2pm to 5pm at the Guildhall. The attendance of Committee Members would be most welcome.

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