

<b>Committee</b>	<b>Dated:</b>
City Bridge Trust	7 <sup>th</sup> August 2018
<b>Subject:</b> Funder Plus offer – proposals for Phase 1	<b>Public</b>
<b>Report of:</b> Chief Grants Officer & Director of City Bridge Trust (CGO)	<b>For Decision</b>
<b>Report author:</b> Jenny Field, Deputy Director of City Bridge Trust	

### Summary

This report sets out proposals for the first phase of a new CBT Funder Plus<sup>1</sup> offer, as part of your Bridging Divides strategy for 2018 – 2023. It is anticipated that these proposals will lay a foundation on which additional layers of support can be added and one which enables other funders could join if they so wished for the benefit of their grantees. This paper builds on outline proposals that were brought to your November 2017 meeting and has been informed by two consultation round tables – one with funders and another with civil society support organisations.

### Recommendation

Members are asked to:

- a) Commit up to £500,000 of your 2018/19 grants budget towards Phase One of the proposed Funder Plus offer.
- b) Commit up to £50,000 non-grants expenditure in order to procure a Managing and Learning Partner to provide capacity to manage the initiative (up to £25,00) and to help evaluate its effectiveness (up to £25,000).

### Main Report

#### Background

1. Your Bridging Divides strategy 2018 – 2023 commits you to improving your Funder Plus offer to make it more coherent and better aligned with other funders.

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<sup>1</sup> 'Funder Plus' means providing capacity building support for grantees, usually through a third-party provider, thereby adding value to the grant. For example, you are supporting the Cranfield Trust's Strive Programme which is providing pro bono management consultancy support for up to 95 CBT grantees.

2. You currently fund a number of support activities for grantees that can be described as Funder Plus. Examples include the Cranfield Trust's Strive Programme which is providing pro bono consultancy support for up to 95 CBT grantees working on issues of poverty, disability or social; exclusion; your Eco-Audit initiative, whereby you will provide applicants with a free eco audit; and the Access and Sustainability Advice Service you fund within the Centre for Accessible Environments to underpin grants you award for access audits and for the capital costs of providing improved access to community building.
3. Whilst these examples are all highly welcomed by your grantees we recognise there is room to improve the range of what is being offered and to provide an effective digital platform to help grantees navigate the offer.
4. It is also recognised that organisations can sometimes feel overwhelmed by too many Funder Plus offers but not able to turn any down for fear of appearing ungrateful. To mitigate this it is important that any offer should be just that: an *offer* not a *requirement*. As important is that funders work together to better align their respective offers.
5. At your November 2017 meeting, you received a paper updating you on the implementation of your Bridging Divides strategy. In that paper, we set out proposals for a "layered" approach to improving your Funder Plus. At its most simple, we would like to be able to provide grantees with support in some of the key areas that organisations often need help with.
6. At the next level, we would want to look at harnessing the talent of the City Corporation's varied workforce for the benefit of our funded organisations. At the next level, we would want to broker support between our funded organisations and the private sector. Finally, we would want to ensure that the offer fully complements the work you are funding through [The Way Ahead](#) and the Hub for London.
7. This paper sets out proposals for the first layer which described as 'Phase One' of your revised Funder Plus offer. We hope this will provide a foundation on which additional layers of support can be added.

## **The proposal**

8. We hosted a round table for funders in January 2018 where there was clear support to both improve and better align our respective Funder Plus offers.
9. A meeting was then held on 10<sup>th</sup> July 2018 for providers of civil society support in London. The main purpose of the meeting was to explore how we could work together to co-create a Funder Plus offer for City Bridge Trust.
10. It was a very rich discussion with a real excitement and appetite for working together to provide an offer that would not only deliver some of the more 'traditional' areas of civil society support, such as governance and managing resources, but also more creative and imaginative ways of helping

organisations build their capacity and organisational resilience by resourcing, for example, peer-to-peer support within organisations or backfilling capacity in an organisation to enable key staff to attend conferences, networking events, training or action learning sets.

11. It was always envisaged that the Funder Plus offer would be navigated via a digital platform that would enable organisations seeking support to self-diagnose but also to enable them to identify the best, or most appropriate, provider for them.
12. However, it was clear from the discussions (and was borne out by the funder roundtable held earlier this year) that whilst digital tools have an important part to play, they cannot replace a face-to-face conversation. Often, human interaction can help to tease out more pressing issues than the organisation itself had originally identified.
13. Both round tables also emphasised the importance of there being 'clear blue water' between who does the needs analysis of the organisation's needs and the funder (potential/existing grantees may be reluctant to show what might be perceived to be weaknesses to funders).
14. It is therefore proposed that Phase One of your new Funder Plus offer will run as a 'Triage and Connect' programme to test what does good 'diagnostics', 'connecting' and 'supporting' look like, working initially with three cohorts of your grantees. The cohorts are likely to be:
  - A group of recent grantees;
  - A group linked by geography (focusing on the 'cold spots' highlighted in the statistical report that was brought to your last meeting);
  - A group linked by an issue (yet to be decided but it would be sector specific, for example, mental health; frontline advice agencies; deaf and disabled people's organisations).
15. Civil society support organisations would be invited to apply for grants to provide this Triage and Connect programme over a twelve-month period and to signpost grantees to the most appropriate source of support (which could not be the Triage and Connectors' own organisation, of course). A draft outline of the programme is currently out for consultation with a number of civil society support organisations and is provided for your information and comment at Appendix A.
16. We envisage three such grants would be awarded, each to work with one of the three cohorts. Recommendations for these grants would be brought to your November 2018 Committee meeting.
17. It is recommended that you commit up to £500,000 of your 2018/19 grants budget towards Phase One of the propose Funder Plus offer. This represents 2% of your baseline grants budget and officers are of the view that this is a reasonable proportion of the grants budget to use for this purpose. It would cover the following costs:

- Funds for CBT grantees in the three cohorts to access the support identified by the diagnostic;
- The cost of an entry platform;
- The cost to the Triage and Connectors of providing the service;
- Engagement of the Triage and Connectors with CBT and its Managing and Learning Partner (see below).

18. In order to provide the 'clear blue water' outlined in paragraph 13 and in order to be able to build in a test and learn approach to the programme, it is also proposed to invite tenders to both manage and evaluate Phase One (that is, to appoint a Managing and Learning Partner) through the City of London Corporation's procurement process. It is anticipated that the cost of managing this would be in the range £35,000 - £50,000. Therefore, it is further recommended that you approve non-grant funding of up to a maximum of £50,000 for these costs.

19. It is proposed that Phase One runs over a twelve-month period initially.

### **Conclusion**

20. It is hoped that Phase One will provide a foundation on which to build additional layers of your offer and one which other funders could join if they so wished for the benefit of their grantees.
21. The appointment of a Managing and Learning Partner will provide the required capacity and distance to manage the programme as well as enabling it to be adapted as necessary.
22. It is proposed to bring regular updates to this Committee on the programme is progressing.

# Appendix A

# DRAFT

## CITY BRIDGE TRUST

### Funder Plus programme: Phase 1

#### 1. Introduction

- 1.1 In April 2018, City Bridge Trust launched its new funding priorities and strategy for 2018-23. This strategy (*Bridging Divides*), will guide how we allocate a grants' budget of around £100m, how we encourage philanthropy, how we make social investments as well as how we use our knowledge, networks and assets to address disadvantage and marginalisation in London.
- 1.2 Over the next five years, we are committed to using all of our financial and non-financial assets and those of our trustee (that is, our funding, knowledge, networks and the expertise we can access) to support Londoners and London's communities who are experiencing inequalities and marginalisation to thrive.
- 1.3 This is an unusually challenging time for London's civil society, and grant-making alone is not sufficient to help voluntary, community and social enterprise organisations achieve their full potential. The Trust recognises that, in addition to finance, organisations need to be equipped with all the necessary skills, knowledge, systems and contacts that allow them to thrive.
- 1.4 To help facilitate this, the Trust is interested in setting up a new Funder + Programme as part of its commitment to strengthening the sector. This new Programme will be developed in collaboration with other funders, grantees and other stakeholders in-line with our values, and we now wish to appoint a Lead Partner to work with us on developing and supporting the collaborative arrangements required to deliver the Programme.

## **2. City Bridge Trust**

- 2.1 City Bridge Trust is the working name of the funding arm of Bridge House Estates, an ancient charity established to maintain and repair the first stone bridge across the River Thames. Since 1995, funds surplus to bridge requirements can be distributed in the form of charitable grants for the benefit of the inhabitants of London. Depending on bridge requirements, we award up to £20m per annum. We usually award 250 grants across all our programmes each year, and at any one time we would expect to have around 600 active grantees.
- 2.2 Our vision is for London to be a city where all individuals and communities can thrive, especially those experiencing disadvantage and marginalisation, by removing the challenges and barriers that they experience.
- 2.3 Our mission is to reduce inequality and foster more cohesive communities, by using all of our assets and resources (monetary and otherwise) for a London that serves everyone.
- 2.4 Bridge House Estates' sole trustee is the Mayor and Commonalty and Citizens of the City of London (in other words, the City of London Corporation). Like other major funders, we can convene conferences and learning events, publish high-profile research, and reach mass audiences through popular media. As a consequence of our trustee and our position in the heart of the City of London we have extensive business and political networks as well as relationships with institutions such as the Barbican and the Old Bailey. These relationships represent opportunities to deepen and expand the work that we deliver through our grant spending. In addition, the Trust oversees the City of London Corporation Social Investment Fund, a designation of £20m from the charity's capital which is allocated for supporting activity with both a social and financial return.

## **3. Bridging Divides**

3.1 Through *Bridging Divides* we will use our knowledge, networks and assets to tackle disadvantage, poverty, inequality and marginalisation. These are often overlapping issues, and whilst some of the work we undertake will seek to manage their consequences, we also look to address root causes in collaboration with partners in civil society, public and private sectors.

3.2 Our approach will be informed by a developmental model where quality of life is viewed as four consecutive stages (survival, coping, adaptation and thriving) and where the time taken to move from one stage to the next varies depending on the individual as well as the nature of the challenges they face. People may move back and forth between different stages, and often need different kinds of support from different agencies based on where they are and what is likely to achieve greatest impact.

3.3 *Bridging Divides* has three priorities with two cross-cutting themes – Reducing Inequalities and Every Voice Counts.

Connecting the capital

We will support work to strengthen communities and improves their future prospects.

Positive transitions

We will support work with Londoners who experience inequality to make positive transitions.

Advice and support

We will help ensure that advice, advocacy and support services continue to exist as a safety net for London's most disadvantaged.

3.4 These priorities are underpinned by our five values:

- Inclusion and representation
- Care for the environment
- Early action
- Collaborative working with Londoners, communities and all sectors
- Being adaptive, creative and purposeful.

3.5 In order to deliver these priorities and work in a way that is aligned to our values we will offer a range of support to the organisations we assist. This will include

delivery of what we call the *CBT Toolbox*, a range of grant funding opportunities, social investment, and access to individual and corporate philanthropy, and our new *Funder Plus* offer, a suite of capacity building services from third party providers.

#### **4. Funder+ Programme**

4.1 We want to develop our new Funder+ Programme based on a number of principles:

- being diagnostic based, with both self-assessment and triage, as well as independence designed into the ecology of support provided;
- that there is an accessible point of entry for organisations into the ecology of support that provides for ‘informed choice’ and ease of navigation around the range of excellent support that exists to support civil society in London;
- that the ecology of support available is *demand led* rather than supply led and recognises the power of peer to peer support for problem solving and sourcing solutions;
- that the ecology of support is ‘network’ driven to provide opportunities for collective reflection, learning and problem solving;
- that is collaborative, both with other funders and resource investors in London’s civil society, and with existing and future delivery partner organisations;

4.2 For the first phase of the programme, we would like to run a Triage and Connect programme to test what does good ‘diagnostics’, ‘connecting’ and ‘support’ look like, based on the above principles.

4.3 To that end, we invite applications for grants to provide a Triage and Connect service (‘Connectors’) for three cohorts of CBT grantees.

4.4 We have identified the following as areas associated with a 'taxonomy of organisational life' with which organisations may need support:

- Governance - to include a focus on Mission, Purpose & Values plus support around organisational culture & leadership;
- Planning - to include areas such as working in a complex environment
- Leadership and management - to include a focus on Mission, Purpose & Values plus (possibly) support around organisational culture & leadership;
- User-centred service - how do you enable co-production to be at the heart of your activity;
- Managing people - to include a focus on Mission, Purpose & Values plus (possibly) support around organisational culture & leadership;
- Learning and development - to include systems thinking;
- Managing money - the emphasis here should be on organisational sustainability and medium to long term financial planning;
- Managing resources - the emphasis here should be on organisational sustainability and medium to long term planning;
- External communications - to include speaking truth to power and co-production;
- Working with others - to include a focus on Mission, Purpose & Values and to ask the big question around the fulfilment of charitable purpose - "does my organisation need to exist?"
- Assessing outcomes and impact - to include active consideration of 'your place' in the [appropriate] ecology and system" and a focus on 'collective impact'.

4.5 However, we do not see this list as exhaustive and there are other interventions that can play a valuable role in strengthening an organisation. These could include:

- Backfilling capacity in an organisation to enable key staff to attend conferences, networking events, training or action learning sets, for example.
- One-to-one mentoring.
- Resource to enable peer to peer support/shared learning amongst organisations.

- Facilitated coffee trials to spark ideas.

We are open, therefore, to other ideas for our Funder + offer.

- 4.6 City Bridge Trust/City of London Corporation will be recruiting a Volunteer Manager over the coming months to develop the City of London Corporation's employee volunteering programme.
- 4.7 CBT is about to embark on a survey of its grantees to determine their appetite for support from the City of London Corporation's workforce. This will also be an opportunity to ask about their support needs and what other Funder Plus offers they are currently engaged with. The results of the survey will also inform the 'list' of support set out in paragraphs 4.4 and 4.5.
- 4.8 Given the above, the 'Connectors' potentially may need to link with the Volunteer Manager.

## **5. Triage & Connect**

- 5.1 Our recent Funder Plus consultation meeting with civil society support providers on 10<sup>th</sup> July 2018, brought home the fact that whilst digital resources can play a valuable role within a diagnostic 'system', it cannot replace human interaction. We are therefore looking to fund three different 'Connectors' to each work with one of the three cohorts.
- 5.2 We would propose to draw the three cohorts from either:
- Recently funded grantees (n.b these will almost certainly be drawn from our previous programmes, *Investing in Londoners* as will take too long to grow a big enough cohort from Bridging Divides).
- Or
- A cohort funded on a specific programme of *Investing in Londoners*.
- Or
- A cohort based in a specific part of London.

5.3 Grantees fitting one of those criteria would be invited to take part in this initiative on the understanding that there are limited resources for this pilot and that support would be offered on a first come first serve basis.<sup>2</sup>

OR

5.3 Grantees fitting one of those criteria would be invited to take part in this initiative. However, resources for this initiative are limited and the 'Connecters' would be expected to prioritise which organisations are assisted, based on a hierarchy of need.

5.4 The three 'Connecters' would be expected to work together to provide an entry point access platform. CBT is flexible as to whether this draws on existing platforms or is designed as a bespoke resource. It will form part of the test and learn approach of the pilot, however.

5.5 It should be noted that 'Connecters' would not be able to also be providers of capacity building support to the organisation concerned.

## **6. Management of Phase 1**

6.1 CBT intend to commission a Managing and Learning Partner to manage the Phase 1 programme for us and to work alongside the 'Connecters' and the supported organisations to enable the programme to be adjusted where necessary.

6.2 The Managing and Learning Partner will also help CBT to plan for Phase 2.

## **7.0 Budget**

7.1 The total budget available for Phase 1 over 12 months is yet to be determined but will need to cover:

- Costs of the 'Connecters'

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<sup>2</sup> I have presented 2 x 5.3's and would be glad of thoughts on this.

- Funds for the supported organisations to access the support identified following the diagnostic whether this be to purchase services from a provider and/or to backfill the beneficiary organisation for its costs to provide capacity to be supported.
- Costs of providing an entry platform.
- Engagement of the 'Connectors' with CBT, it's Managing and Learning Partner to be appointed to support the test and learn approach.