

<b>Committee(s):</b> City Bridge Trust Committee – for decision	<b>Dated:</b> 25 March 2021
Policy and Resources Committee - for decision	8 April 2021
<b>Subject:</b> Joint Philanthropy Strategy Implementation – update and future plans	<b>Public</b>
<b>Which outcomes in the City Corporation’s Corporate Plan does this proposal aim to impact directly</b> (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
<b>Which outcomes in the Bridge House Estates Strategy does this proposal aim to impact directly</b>	See para 20 below
<b>Does this proposal require extra revenue and/or capital spending?</b>	No
<b>If so, how much?</b>	N/A
<b>What is the source of Funding?</b>	N/A
<b>Has this Funding Source been agreed with the Chamberlain’s Department?</b>	N/A
<b>Report of:</b> David Farnsworth, Chief Grants Officer	<b>For Decision</b>
<b>Report author:</b> 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. Analysis<sup>1</sup>, however, suggests that giving in 2020 remains comparable to previous years, although restricted in-person fundraising has inevitably taken 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 spent<sup>2</sup>. 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

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

<sup>2</sup> <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.<sup>3</sup> 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.

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<sup>3</sup> 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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