

Committee	Date
Grants Committee of the Bridge House Estates Board	20 June 2022
Subject: BHE Managing Director's Update Report	Public
Which outcomes in the <i>BHE Bridging London 2020 – 2045</i> Strategy does this proposal aim to support?	1, 2, 3
Which Bridging Divides Funding Strategy priority does proposal aim to support?	All
Does this proposal require extra revenue and/or capital spending?	No
Report of: David Farnsworth, Managing Director of BHE	For Information

Summary

To support the Grants Committee in the discharge of its duties, this regular report provides an update on key areas of activity to note and agree, where necessary. Specifically, the report provides details on the following: the agreed extension of the Bridging Divides Strategy; budget monitoring information; updates on the LocalMotion collaboration, Alliance Partnerships, London's Giving, the Anchor Programme and the Bridge Programme; how CBT intends to communicate its offer with clarity; and recent impact and learning findings including details of the London Funders Festival of Learning and, finally, a learning case study on Lewisham Local.

Recommendations

The Grants Committee is recommended to:

- i) Note the contents of the report.

Main Report

Governance and Strategy

1. Extension of Bridging Divides Strategy - Following the endorsement of the Grants Committee and the BHE Board to re-commit to the overarching vision and mission of *Bridging Divides 2018 – 2023*, in May 2022 the Court of Common Council agreed to extend the funding policy for a further five years to 2028. Officers have also written to update the Charity Commission of the extension of funding policy in line with the requirements of BHE's governing documents.
2. Whilst the Grants Committee and the BHE Board agreed that the funding policy should be extended, both also agreed that the manner of delivery of the *Bridging Divides* policy should be revised to allow for more effective and impactful activities and use of funds. Specifically, it is intended to make the policy more transparent and relevant to the needs of beneficiaries by updating all current open funding programmes to include a more explicit equalities focus; collaborating with other funders to extend the reach and scale of *Bridging Divides*; supporting strategic interventions with and for communities especially hard hit by the pandemic; and investing further in the capacity and resilience of civil society organisations.
3. Responsive Funding Programmes - The Funding Team recently completed a review of all responsive funding streams, taking account of learning from the

pandemic, research literature and consultations with key partner organisations. The non-public section of today's agenda includes a report with recommendations for CBT's open funding offer. This provides an example of how the manner of delivery of the *Bridging Divides* policy is being updated following the extension approval.

4. Member Briefing - Officers delivered a presentation at a New Members' Briefing event at Guildhall on 25 May, briefing newly elected Members on charitable and philanthropic activity at the City Corporation. The in-person briefing covered the history of BHE, Tower Bridge, and the primary and ancillary objects, the Bridging Divides funding strategy, social investment activity, the Philanthropy Strategy, Central Grants Unit and Corporate Charities Review, and an outline of Trustee duties and principles of good governance. This was followed by a Q&A session. A recording of this session is available to all Members on request.

Finance – Budget Monitoring

5. CBT's budget for 2022-23 is a total net expenditure of £107.5m, made up of an allocation of £102.6m to the grants programme and £4.9m (net of income) to operational costs. Total expenditure for the first two months of the financial year was £3.2m against a budget of £6.4m. The underspend arises from Grants and Employee costs.
6. The underspend in grants is due largely to the transition funding offer which places a cap on the maximum value of any individual grant. This offer is scheduled to end in late June and the non-public papers include proposals for the full unpausing of Bridging Divides, at which point we expect to see applications for higher values. Some underspend is also attributable to recent recruitment and the time taken onboarding new Funding Managers.
7. Employee costs underspend of £134k is due to some vacant posts, notably, three Funding Managers and a Social Investment Associate. Two of the Funding Managers vacancies arose due recent retirements. The Funding Directors are reviewing overall workload and resource requirements as a part of their recruitment planning. The Social Investment Associate role will be reviewed following the anticipated approval of the Supplemental Royal Charter.

Bridging Divides Funding Updates

LocalMotion

8. LocalMotion is a collaboration between CBT and five other funders, joining forces to tackle economic, environmental, and social inequality in six places, utilising the resources of all six funders and places to have an impact which is greater than the sum of its parts.
9. A branding and communications partner, *Barley Communications*, and learning partner, *IG Advisors*, have now been appointed and a learning report covering initial phases of work has been published (available on request). A website and social media handles will be launched shortly.

10. Grants Committee co-opted member (and LocalMotion “board champion”), William Hoyle, and Funding Director, Sam Grimmatt Batt, hosted a learning session, alongside Kathleen Kelly, Director of Collaboration for LocalMotion, at the Festival of Learning (an online funder convention which takes place annually over two weeks, convened by London Funders). The session shared learnings with other funders about how the collaboration had come about, and progress so far.
11. William Hoyle and Sam Grimmatt Batt also attended a bi-annual learning summit on 6-7 June in Birmingham. The session brought together funders and places to foster collaboration and learning and to celebrate progress and success as well as to co-design a learning plan for the next two years of the partnership.

Alliance Partnerships

12. Officers co-ordinated a session at the London Funders’ Festival of Learning sharing lessons from two CBT Alliance Partnerships (Rosa £500k, and Greater London Authority £720k) which included an introduction by Aasha Farah (Funding Manager and CBT DEI Working Group Chair), presentations from Rosa and the GLA and interviews with an assessor for one of the funds, and applicant of another. The session was focused on the value of including people with lived experience of the issues being tackled in the programme design and decision-making process. It was extremely well received, being one of the most well attended sessions of the festival.

London’s Giving

13. As reported at the last meeting of the Grants Committee, the London’s Giving Strategic Development Fund was launched on 3 February 2022 with a closing date of 17 March 2022. 19 applications were received, the overwhelming majority of which were from existing or emerging Placed-Based Giving Schemes (PBGS). Assessment of these is currently underway and officers are aiming to bring these to the September Grants Committee Meeting, either for decision (those above £250,000) or for information (those of £250,000 or below, approved by Delegated Authority).
14. As trailed in this report at the last meeting, two consultants have been procured, following a competitive tendering process, to explore the feasibility of two additional ideas that could support the strategic development of PBGS in London.
15. Deborah Xavier, a freelance consultant, has been engaged to investigate the feasibility of establishing a Resource Hub for PBGS. This would build on the existing, excellent work of London’s Giving, currently hosted by London Funders. The social enterprise, the Social Innovation Partnership (TSIP) has been engaged to explore the feasibility of establishing a Challenge/Match Fund to enable local schemes to leverage funds from new donors. It is envisaged that Deborah and TSIP will work closely together on these two areas of work to ensure their recommendations are mutually complementary. The work will be overseen by the Task and Finish Group, comprising representatives from the London’s Giving Network and the CBT Team, that was established to co-curate additional support of PBGS in London.

Anchor Programme

16. As mentioned in the March 2022 MD's report, a paper is being presented to this meeting on the Anchor Programme, a new fund which aims to strengthen the sector by providing long term funding to organisations aiming to catalyse systemic change. Following a set of Design Group meetings, where civil society organisations and officers were facilitated to work together in co-designing the programme, a funding plan is being presented with the request to allocate up to £20m, in principle, subject to the usual grants assessments and delegated authority protocols.

The Bridge Programme

17. CBT's "Funder Plus" offer, *The Bridge Programme* is an approach connecting CBT grant funded organisations with a range of free, non-financial support to help address a specific issue, whilst enhancing their capacity, resilience, and longer-term stability. Areas of support include: fundraising and business planning, management systems, HR, and governance. The current pilot has been extended by six months to 30 September 2022, to allow more organisations already in the application pipeline to benefit from the programme. The evaluation of the programme along with an internal review will inform future recommendations for the programme to the September Grants Committee.

Philanthropy

18. The Joint Philanthropy Strategy includes the giving of time as well as money and assets. The City Corporation's volunteering offer to its employees, residents and community volunteers therefore falls within the ambit of the strategy. The Corporate Volunteering Manager job-share have deployed their expertise in volunteer management to recruit, train and support employee volunteers stewarding crowds in the build up to and aftermath of the Service of Celebration at St Pauls on Friday 3 June. The event ran very smoothly and has provided a rich cohort of additional volunteers to help champion and contribute to volunteering efforts across the City Corporation.

Communications and Events

19. Communicating CBT's offer with clarity - The Communications Team is nearing completion of a project to make improvements to the way CBT communicates about its funding and non-financial support offers. This collaborative piece of work has involved colleagues from across CBT and has focused on ensuring the key areas of work are fully accessible, understandable, and easily navigable to audiences. Timings have been set by the website development, but the new way of describing the existing funding programmes and wider offer will be rolled out more widely as soon as possible.

20. This project has been informed by extensive user feedback, including interviews, surveys, testing and workshops with real users, potential grantees and CBT officers. These insights highlighted a need for: clarity and consistency in how CBT communicates its funding streams both internally and externally; front-loaded key information where possible; Plain English and familiar, accessible language.

21. Based on the feedback, the following changes will be implemented:

- a. A new structural approach to communicate the different areas of work, splitting the offer by financial and non-financial support, and referring to CBT funding in 3 clear sections:
 - i. Grant funding (all available funding opportunities)
 - ii. Strengthening the sector together (strategic initiatives)
 - iii. Social impact investment (Stepping Stones Fund & CoLSIF)
 - b. Grouping grants by issue-led thematic areas, and importantly, moving away from Connecting the Capital, Positive Transitions and Advice and Support as titles, as research showed they were a barrier for organisations applying for support. This approach allows outreach to lead with key information, giving CBT target audiences the information they need upfront and concisely.
22. A detailed briefing note on the thematic areas and descriptions can be provided. This work does not involve any changes to the existing funding strategy. This work will support and complement the funding strategy by giving officers the tools to communicate with clarity and ensure the CBT offer is fully accessible to all.
23. It is expected that these changes will be rolled out on the new website in late August. Members and the CBT Team will be made aware of the changes and familiarised with the approach before the launch of the new website. An ongoing agile approach will be taken, allowing for iteration in language as areas develop.
24. Centre for London Event: What levelling up means for London – On 29 June 2022, the Centre for London are hosting an event to launch a report, on the challenges for London and Londoners in regard to the Government’s levelling up agenda. The event is part of Centre for London’s year long project to influence Government thinking on levelling up, and CBT’s Associate Director, Dinah Cox, sits on its advisory group. The project is partly funded by CBT and also supported by the City of London Corporation as a major sponsor. The event will be livestreamed on YouTube and available to watch back at your own convenience. Further details can be provided for any Members who may be interested in the event. Alternatively, Members may sign up to attend the event online [here](#).

Impact and Learning

21. Feedback from our funded organisations – Included in Item 15 of today’s paper is an appendix which highlights impact & learning from our funded organisations from February to April 2022. The feedback includes information on average application time, CBT ratings and comments from CBT grantees.
22. Learning Case Study - A CBT learning case study is provided at **Appendix 1**. The case study is about Lewisham Local, a funded organisation dedicated to generating cross-sector collaboration and the giving of time, money and skills for the benefit of the local community in Lewisham. During the pandemic, Lewisham Local coordinated Lewisham’s emergency response, managing the distribution of food and other essentials, and engaging local businesses to support as well. The learning case study demonstrates the issues faced during Covid-19 by

organisations supported by CBT and highlights ways grantees adapted their services and approaches.

23. London Funders Festival of Learning - CBT staff hosted several sessions at the London Funders Festival of Learning, an annual event which brings together a range of funders from across London to share insights and expertise on relevant topics. CBT's Impact and Learning Officer, Jen Durrant, facilitated an interactive session with two of CBT's funded organisations, Clean Break and Alliance for Inclusive Education (ALLFIE) on how funders can work in a more equitable way with communities. Clean Break and ALLFIE both outlined how they work with the people they support in an equitable way, with participatory approaches and involvement in decision making being key, before then discussing how funders could work more equitably with funded organisations. They highlighted the importance of making application processes more accessible, particularly for smaller and user-led organisations which are less likely to have a team of professional fundraisers; the need to shift metrics of success to recognise the more holistic and longer-term support they provide for people; and the importance of core and unrestricted funding to enable them to truly make a difference. The session was attended by approximately 15 representatives from different funders and their comments suggest they found it useful, insightful and thought-provoking; they also each committed to taking an action to advance equity in their organisation as a result of what they heard.

24. Learning Visits - The Impact and Learning team are in the process of trialling a new approach to learning visits, aiming to make them more useful for all involved and to reduce the power imbalance between funder and funded organisation at such meetings. Thank you to those Members of the BHE Board and Grants Committee who attended a briefing about how they may create a positive learning environment during learning visits and to Chair Paul Martinelli and Alderman Sheriff Alison Gowman for attending and feeding back on one visit each as part of this trial. The trial has been delayed due to Covid-related illness and should be completed within the next few weeks, after which the new approach to learning visits will be rolled out. The trial is part of a larger review of impact and learning processes for funded organisations, including approaches to grant reporting and communication with funded organisations about their progress.

Conclusion

25. This report provides a high-level summary of CBT activities since the Grants Committee last met in March 2022. The Grants Committee is asked to note the content of the report. Further information on any of the updates given in this report can be provided to the Grants Committee verbally in the meeting or in a written format in advance of or as a follow-up to the meeting.

Appendices

- Appendix 1 - Learning case study: Lewisham Local

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Appendix 1 – Learning case study: Lewisham Local (formerly known as Rushey Green Timebank)

Organisation:	Lewisham Local (formerly known as Rushey Green Timebank)
Grant type:	Bridging Divides, Connecting the Capital (continuation funding)
Grant amount:	£323,500 over five years from March 2020 for Lewisham Local project Plus £94,000 continuation funding over two years from March 2020 for Wildcat Wilderness project Also received £15,000 small charity emergency Covid funding in April 2020, £73,352 LCRF Wave 2 funding in May 2020 and £35,464 LCRF Wave 3 funding in August 2020
Grant purpose:	Development of scheme to connect assets in the community to give time, skills and resources to boost good causes and grow local pride, fairness and equality. Wildcat Wilderness (continuation): Salary and associated costs of community activities and maintenance in the community green space
Covid changes:	Pivoted to coordinating local emergency response, managing food distribution, volunteering and medical pickups across local services
Interviewee:	Philippe Granger, CEO
Interview date:	19 th October 2021
Website:	https://www.Lewisham Local.org.uk/
Address:	PLACE/Ladywell Unit C, 261 Lewisham High St, SE13 6AY
BBGM ref:	15883

Summary

This is a learning case study about Lewisham Local, a funded organisation dedicated to generating cross-sector collaboration and the giving of time, money and skills for the benefit of the local community in Lewisham. During the pandemic they coordinated Lewisham's emergency response, managing the distribution of food and other essentials, and engaging local businesses to support as well. Their challenge now is helping organisations transition from crisis mode to more long-term thinking given the high levels of demand and loss of volunteers as lockdown has ended.

Their experience highlights a number of key lessons for CBT, the recommendations from which are included at the end of this document.

Introduction

This is one of a series of learning case studies demonstrating the issues faced during Covid-19 by organisations CBT supports 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.

This case study focuses on Lewisham Local (formerly known as Rushey Green Timebank) and draws on information provided in their Impact and Learning report and an interview with their CEO, Philippe Granger.

Note: Since this case study was carried out, Lewisham Local spoke at our Networking and Learning Day for Funded Organisations (1st April 2022) and shared their learning from the pandemic.

What made Lewisham Local unique before the crisis?

Rooted in an ethos of coproduction and cross-sector collaboration, Lewisham Local is all about facilitating connections for people to give time, skills and money for the benefit of the local community in Lewisham.

“We encourage people to come up with ideas for projects and design the future of the organisation with us ... Our vision is around helping people to do good and get involved.”

For example, they created the ‘Lewisham Local’ card, which entitles volunteers to discounts in local businesses. This served to recognise the value of volunteers, support local traders and generate conversations between the voluntary sector, businesses and the council.

“We’re a connector and incubator, we push the boundaries, and we’re very trusted locally, the council sees us as a partner and they know we have this ability to go out and do things, we get things done.”

CBT funds their Lewisham Local project, which aims to develop local giving initiatives – including time, money and skills – and build capacity and assets sharing amongst community organisations in Lewisham.

“Our CBT grant is about becoming a local generator of funds, to drive local giving from employers and businesses. We don’t have big business in Lewisham, we don’t have financially wealthy assets, so our approach is more about connections on the ground, giving support, businesses promoting and supporting local people’s issues.”

CBT has also funded their Wildcat Wilderness project, which provides volunteering activities, forest schools and creative workshops in their community green space to engage local people in nature conservation and food growing.

How did Covid-19 affect Lewisham Local and how did they adapt their provision?

As a trusted port of call for local people, Lewisham Local were faced with a huge increase in demand for support, particularly for essentials such as food, medicine and emergency money.

“We were getting calls at 11pm from people saying they’d run out of money and their electricity was going to get cut off.”

Much of their community and project work had to be put on hold as lockdown began and organisations and local people were swept into crisis mode.

Lewisham Local adapted by immediately stepping in to coordinate the local response, gathering the foodbanks together and instigating the Lewisham Covid Response Hub.

“We had a plan together within three days, by the following Monday we had a website ... We just mobilised straight away.”

They continued to coordinate the emergency response throughout, hosting daily Zoom meetings with partners, collating data on the need for and distribution of food and other essentials, and responding to local people’s immediate needs.

“There were foodbanks, there were autonomous groups giving food out, there were those officially shielding needing food, there were people not officially on the shielding list needing food, there were discussions round what goes in the food box, how much the box costs ... We were the centralised single point of access, we logged all calls for food, medication pickups, errand running, volunteering, bespoke shopping, and coordinated the partners.”

Importantly, they worked to ensure food provision was culturally appropriate; for example, when a local business owner pointed out that people from a Caribbean background were not receiving culturally appropriate food, they worked with him to generate donations from his customers and raised £250 for more appropriate food provision.

How are Lewisham Local adapting as lockdown ends?

In some ways, Covid was helpful for clarifying their mission, integrating them further into the community and breaking down barriers to partnership working.

“Covid has given us a focus and mission that is very clear, it’s about making a difference, whatever we can do in Lewisham to support the voluntary sector’s sustainability. Lots of organisations have let down their walls in the pandemic.”

Since March 2021 Lewisham Local have been returning to their pre-Covid work of connecting with local businesses, developing the voluntary sector and facilitating giving projects; however the damage done by the pandemic and rising food poverty, unemployment and energy bills mean that organisations are not able to engage in the same way.

“We want a thriving engaged voluntary sector, we’re visionaries, but some groups are just trying to make ends meet, get the work done, they haven’t got time to listen to visions. We can’t just go in and say you should do this or that.”

The loss of volunteers as people returned to work is also a challenge, given the pressure the sector is under to meet increased demand.

“During Covid people were furloughed, they were more aware of local issues, thousands got involved, but then they went back to work ... And in lockdown volunteering was very mission-based, you get food and deliver it and you feel great, but now the roles aren’t as short or fun, they require more commitment, more routine, it’s harder for people to commit. There’s been this glorification of volunteers, people think they’re on tap, but it doesn’t actually work like that. We need to lower expectations a bit, advocate for the sector.”

In addition, many of the groups that started up during lockdown are now struggling, so Lewisham Local is supporting them with governance and fundraising advice.

“During Covid lots of people thought they should start a charity, but hadn’t thought through all the systems you need, where’s the money going to come from ... Lots of people on the ground are motivated by compassion but they’re not good at management – but we are good at that so we can support and partner, we know about the finances, planning, governance, we can work together.”

Lewisham Local are also launching a Lewisham Warmer Together initiative to highlight fuel poverty and raise funds for advice services, are developing a Lewisham Community Lottery to increase giving and engagement from across the borough and are the volunteering partner for London Borough of Culture next year.

How could CBT better support Lewisham Local?

In addition to the grants making their projects possible, Lewisham Local has appreciated CBT’s support through the Bridge Programme and being kept up to date with relevant events and opportunities. They highlight, however, that CBT could do more to support new and smaller organisations, particularly around governance.

“If you want to do something really meaningful for us, host some training around governance and leadership for CEOs and Boards. We want organisations to be thinking about governance and leadership that’s more innovative and dynamic. Normal governance training is all about filing accounts, compliance, risk assessments – but we want to hear more about how you can be innovative as a Board, how to include young people or people who are inexperienced.”

In addition, Lewisham Local suggest that CBT could take a more relational approach with them and other funded organisations, having more detailed discussions with them and being open about CBT’s way of thinking.

“It would be really good for CBT to do a session on what is it like to be a funder. The voluntary sector needs to understand more about how you think, it would be great to have that exposure – not everyone has that insight, your customers need to understand how you’re thinking, how you’re approaching things.”

Lastly, Lewisham Local highlight the importance of providing sufficient funding for DEI, training and salaries in addition to project costs.

“Funders need to consider some room for training and DEI, it should be explicit in funding applications so we know you’ve got to put it in. At the moment you don’t have to so when you’re looking to cut the budget it falls off. You also need to encourage organisations to pay well and put in salary increases each year, ask them ‘are you paying pensions?’, say that ‘as a funder we recognise this is important and we’re not looking to fund the cheapest things but quality.”

What can CBT learn from Lewisham Local?

Lewisham Local shows the value of developing cross-sector collaboration and community engagement at all levels to generate funding and amplify the impact of projects; **CBT should consider funding similar cross-sectoral work elsewhere.**

Lewisham Local highlight the pressures the voluntary sector is under and the difficulties they face in thinking in a more visionary way; **CBT could explore how to support organisations to transition from crisis mode to more long-term thinking.**

Lewisham Local point out the need for training on innovative governance and explanations on how funders think; **CBT could incorporate this into its external learning programme.**

Lewisham Local highlight the importance of funding for DEI and training; **CBT could incorporate this into its grant budgets and application processes.**

Finally, Lewisham Local are keen for funders to listen to them and develop funding streams in partnership with those on the ground; **CBT could work more collaboratively with funded organisations to design programmes together.**

“We would be really happy to work with you, come and talk to us and say ‘what could we do in Lewisham, how could we partner on this?’ We have grassroots intel that you don’t have, we could test things out together.”