

<b>Committees:</b> Bridge House Estates Board Policy and Resources Committee	<b>Date:</b> 15 November 2022 17 November 2022
<b>Subject:</b> Approach and Timeline to Redeveloping the Joint Philanthropy Strategy and Corporate Volunteering Strategy	<b>Public</b>
<b>For BHE, which outcomes in the Bridging London Strategy does this proposal aim to meet?</b>	<b>1 and 3</b>
<b>Which outcomes in the City Corporation's Corporate Plan does this proposal aim to impact?</b>	<b>See paragraph 8 below</b>
<b>Does this proposal require extra revenue and/or capital spending?</b>	<b>No</b>
<b>Report of:</b> David Farnsworth, Managing Director of Bridge House Estates	<b>For Decision</b>
<b>Report authors:</b> Fiona Rawes, Philanthropy Director, Alice Hall & Julia Makin, Corporate Volunteering Manager (job-share)	

### Summary

This report provides headlines on progress with the Joint Philanthropy Strategy and the Corporate Volunteering Strategy which are closely aligned but which were launched independently in 2018 and expected to conclude in March 2023. It notes the ongoing relevance of both strategies to the strategic ambitions of the City Corporation and to Bridge House Estates in 2022/23 and proposes that each strategy should be extended by a further year, noting the contextual factors which make doing so desirable. It sets out a proposed timeline and approach for a strategic review spanning both strategies for member review and approval, with an intention to return to the relevant committees/Boards in Autumn 2023 with strategic recommendations for consideration.

### Recommendations

It is recommended that the Bridge House Estates Board, in the discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity reg. no. 1035628) and solely in the charity's best interests:

- i) Note the update on the implementation of the Joint Philanthropy Strategy and the Corporate Volunteering Strategy;
- ii) Agree an extension to the Joint Philanthropy Strategy of one year until 31<sup>st</sup> March 2024;
- iii) Subject to (ii) above, approve the approach and timeline for shaping recommendations for the future direction of the Joint Philanthropy Strategy proposed in paragraph 7; and
- iv) Note the proposed approach to the Corporate Volunteering Strategy.

It is recommended that the Policy and Resources Committee:

- i) Note the update on the implementation of the Joint Philanthropy Strategy and the Corporate Volunteering Strategies;
- ii) Agree an extension to the Joint Philanthropy Strategy of one year;

- iii) Subject to (ii) above, approve the approach and timeline for shaping recommendations for the future direction of the Joint Philanthropy Strategy proposed in paragraph 7; and,
- iv) Agree that the term of the current Corporate Volunteering Strategy be extended by one year until 31<sup>st</sup> March 2024, allowing the future direction of volunteering work to be considered alongside that of the proposed Joint Philanthropy Strategy review.

## Main Report

### Background

1. A [joint Philanthropy Strategy](#) was adopted by the Court of Common Council in June 2018 as Trustee of BHE in furthering the charity's ancillary object and also for the City Corporation itself. The Joint Strategy was developed in recognition of the fact that the City Corporation undertakes significant philanthropy<sup>1</sup>, whether in its own right or as Trustee of 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 City Corporation was contributing to, and raising awareness of, high impact and/or high value philanthropic practice more broadly.
2. The City Corporation's [Corporate Volunteering Strategy 2018-2023](#), sets out the City Corporation's vision for volunteering undertaken by employee volunteers, by 'community' or external volunteers, and by residential volunteers<sup>2</sup>. It was developed by the Corporate Strategy team and approved by Policy and Resources Committee on 6 September 2018. It aligns with the aspirations of the Joint Philanthropy Strategy, supporting its overall vision to role model best practice in the giving of time. The Corporate Volunteering Manager ('CVM') was moved in 2019 from the Corporate Strategy team to report into the Philanthropy Director alongside the Head of the Central Grants Unit for whose work cohering the giving and charitable practice within the City Corporation the Philanthropy Director is also responsible. The Philanthropy Director is responsible for leading the development, implementation and ongoing delivery of the Joint Philanthropy Strategy for the City Corporation and BHE, and reports to the Managing Director of BHE, who has a Head of Profession role for Charities.
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 BHE's activities and outlines the collective impact it seeks to have through its primary (re its five bridges) and ancillary objects (re its funding and wider philanthropic activities as encompassed in the City Bridge Trust ('CBT') funding strategy, [Bridging Divides](#)). The Joint Philanthropy Strategy for BHE sits under that overarching Strategy and provides more detail on philanthropic practice and objectives for BHE.

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<sup>1</sup> Defined by the Philanthropy Strategy as the giving of time, skills, assets and money.

<sup>2</sup> Employee volunteering - focuses on City of London Corporation Employees

Community volunteering – focuses on external volunteers from across London and beyond who volunteer for City of London Corporation departments

Residential volunteering – focuses on residents within the Square Mile and City of London housing estates.

## Current position

4. Headlines on the achievements and learning amassed through the Joint Philanthropy Strategy and Corporate Volunteering Strategy are set out in Appendix 1. They create propitious foundations for the future review and development of the Philanthropy and Corporate Volunteering Strategies, both of which support the strategic priorities of the City Corporation and BHE. As well as supporting the City Corporation's 'contribution to a flourishing society', there is evidence – which officers will further test and consider – that the Joint Philanthropy Strategy positively reinforces its license to operate, enhances its soft power, and strengthens the operation of other charities for which the City Corporation is charity trustee through alignment of objectives and outputs. For BHE, it helps connect BHE's philanthropic innovations to the broader philanthropic ecosystem and ensure that the skills, assets and networks of its corporate Trustee enrich BHE's philanthropic contribution still further.
5. The Corporate Volunteering Strategy contributes to the City Corporation's employee value-proposition, by providing inspiring opportunities to a socially and environmentally motivated employee base, whilst also supplementing BHE's funding with the introduction of employee volunteers to its funded partners, reflecting the 'funder plus' aspirations of CBT's Bridging Divides Strategy. The Corporate Volunteering Strategy also helps to support the Joint Climate Action Strategy commitments by supplementing, through external volunteering, the stature and operations of the City Corporation's Open Spaces (some of which are also charitable), as well as enriching its cultural and heritage offer. As the Chair of Policy and Resources noted in a City AM piece in June this year, "*The value of volunteering is unquestionable. It boosts our economy and shapes the lives of those who offer help – and those who receive it.*"<sup>3</sup>
6. The existing strategies still have relevance which would support them continuing to operate until March 2024, rather than their intended conclusion of March 2023. This would enable any revised strategies to be informed by certain key actions/outputs likely to materialise in 2023. In the case of the Philanthropy Strategy, for BHE specifically, these actions include the sealing of the Supplemental Royal Charter which will provide for the express power to socially invest and the approval of a new BHE Investment Strategy (likely to be February/ March 2023). It would also enable engagement with the new Town Clerk and the new Chief Funding Director for BHE, ensuring they have the opportunity to understand and influence the strategic recommendations. In the case of the Corporate Volunteering Strategy, an extension to the strategy term by one year would enable further learning around its intended outcomes within a more stable operating context than that noted in Appendix 1, thereby enabling more robust foundations for any future recommendations relating to the work.

## Next steps/ Proposal

7. It is proposed that officers return to the relevant committees in Autumn 2023 with recommendations for the City Corporation and for BHE as to the future shape, resourcing and iteration of the Philanthropy and Corporate Volunteering Strategies. In preparation for doing so, it is proposed that a strategic review takes place of the

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<sup>3</sup> [If time is money, volunteering should form a central part of our economy and careers \(cityam.com\)](https://www.cityam.com/news/if-time-is-money-volunteering-should-form-a-central-part-of-our-economy-and-careers/)

City Corporation's and BHE's Philanthropy portfolio (including its volunteering work), led by the Philanthropy Director reporting, as referenced above, into the Managing Director of BHE with the indicative review stages outlined below.

- **Stage 1: Review (November 2022 – February 2023):** Evaluate the successes/challenges of the Joint Philanthropy Strategy, engaging with key stakeholders. Identify synergies with learnings already generated through Corporate Volunteering Strategy implementation.
- **Stage 2: Plan (February – April 2023):** Note the external and internal operating context and identify, with external support where appropriate, the associated opportunities. Undertake initial testing, with clear opportunities for member engagement. Dovetail with engagement on volunteering, where appropriate, and identify synergies with new learnings generated through ongoing implementation and engagement on Corporate Volunteering Strategy.
- **Stage 3: Develop (May - June 23):** Refine, shape and cost options for the future iteration of these Strategies, recognising key impact areas in common between them.
- **Stage 4: Consult (July – September 2023):** Consult on options for both Philanthropy and Volunteering with key stakeholders including additional opportunities for Member engagement
- **Stage 5: Governance (October – November 23):** Synthesise findings into recommendations for the future shape of Philanthropy and Volunteering for review and approval as appropriate by the relevant committees.
- **Stage 6: Implementation (December 2023 – March 2024):** Prepare for implementation.

### **Corporate and Strategic Implications**

8. Strategic Implications - For the City Corporation, the recommendations in this report support outcomes 3, 4 & 5 of the Corporate Plan, and align with and support the recommendations of the 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.
9. Financial and resourcing implications - The budgets both for Philanthropy and for Volunteering are costed, commensurate with previous years of each Strategy and factored into the relevant BHE and City Corporation budgets for FY 2023/24.
10. Legal implications - As Trustee for BHE, the City Corporation must continue to independently consider and ensure that the adoption of the Joint Strategy and its implementation remains in the charity's best interests; and further that any conflicts of interest arising in the City Corporation acting for itself, or otherwise as Trustee of BHE, are managed.
11. More specifically, there will be significant legal and reputational implications for the City Corporation, as charity trustee or otherwise, if:

- a. the retention of volunteering data and defined relationship of volunteers to the City Corporation are not implemented and monitored; and/or
  - b. the governance, administration and (where appropriate) management of the grant-making of charities for whom the City Corporation is trustee is not compliant with regulatory parameters.
12. Risk implications - Appropriate skills, insights and networks are currently being developed across the relevant City Corporation Teams to ensure that any risks attaching to the City Corporation's philanthropic activity under the Joint Strategy are identified and the appropriate mitigations put in place. In this way the City Corporation, for itself and as trustee of BHE, can ensure that its focus on role modelling high impact philanthropy remains an integral part of the implementation of the Joint Strategy.
13. Equalities implications - The City Corporation Public Sector Equality Duty (PSED) applies to the exercise of its local authority functions only. Nevertheless, 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 City Corporation's separate discharge of the PSED. There will also be significant gains for Equalities with an Equalities Impact Assessment programmed into Q4 (FY 22-23) which will support the overall Volunteering Strategy Engagement in order to understand the full range of barriers to volunteering participation and to enable impactful outcomes for all.
14. Climate implications - Philanthropy: there is increasing focus on ensuring that the City Corporation's philanthropy across all of its functions enhances the aspirations for the Climate Action Strategy, noting that it is often the most disadvantaged who are most adversely affected by Climate Change.
15. Security implications - There will be gains on the Volunteering front in respect of additional, trained personnel (Royal Events Supporters) on the ground at major events of national significance.

## **Appendix 1**

- Achievements and learning amassed from the Joint Philanthropy Strategy and the Corporate Volunteering Strategi

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## **Appendix 1: Achievements and learning amassed from the Joint Philanthropy Strategy and the Corporate Volunteering Strategy**

1. Work resulting from the Joint Philanthropy Strategy has enabled: better understanding of the breadth, quantum and impact of giving taking place across the City Corporation and BHE; greater community of practice across different pockets of giving (whilst acknowledging that there is still more work required in this regard); and much greater consistency and oversight in relation to the City Corporation's own giving and governance of charities for which it serves as trustee thanks to the work of the Central Grants Unit and the associated Corporate Charities Review cross-departmental working group. There is also much to be proud of in relation to the highly regarded contribution of BHE's funding arm, CBT to progressive funding partnerships in London, exemplifying the thought leadership aspirations encompassed under the role modelling pillar of the strategy. The Lord Mayor's Appeal, a separate legal entity closely aligned to the City Corporation, also deserves mention for successfully harnessing corporate philanthropy in support of its aims, having developed a more strategic approach to doing so through its "A Better City for All"<sup>4</sup> strategy launched 2018 and refreshed in 2022.
2. Despite a challenging external and internal operating context for the Corporate Volunteering Strategy over the past two years due, in particular, to the demands of the Covid-19 pandemic and the Target Operating Model (TOM) organisational restructure, the City Corporation's employee volunteering programme, 'LEAP', was developed and launched in June 2020 for City Corporation staff with an associated online platform through which to broker relationships between volunteers and volunteer-involving-organisations, including CBT funded partners. As a result, there has been uplift in employee volunteering year on year. Volunteer hours in FY 21-22 increased 10% on pre-Covid levels (comparing to FY 19-20). LEAP is now on track to deliver at least a 15% uplift – and likely significantly higher - in employee volunteering hours in FY 22-23 compared to those recorded in FY 21-22.
3. In addition to the core employee volunteering offer, the CVM have harnessed the expertise and capacity of the City Corporation's employees to support the City-based public events taking place for the Platinum Jubilee and Operation London Bridge. The CVM dedicated significant resource to successfully recruiting, onboarding and training Royal Event Supporters from within the City Corporation to help steward the public for these historic occasions.
4. Progress on community and residential volunteering to complement the work to develop employee volunteering within the City Corporation (as noted at paragraphs 3 and 4 above) is accelerating. Guidance for ensuring consistent management of External Volunteers has been drafted and is being tested and iterated internally, with backing of the City Corporation's Chief Operating Officer and Chief People Officer, working with the Philanthropy Director. The CVM is also working with Community and Children's Services<sup>5</sup> to build effective engagement and support of residential volunteering in light of the shift in volunteering habits resulting from the Covid-19 pandemic.

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<sup>4</sup> [About The Appeal | Our Strategy | The Lord Mayor's Appeal 2021/2022 \(thelordmayorsappeal.org\)](https://www.thelordmayorsappeal.org/)

<sup>5</sup> Roundtable with CCS representatives held on 22 February 2022 recommended next step to better understand what residents want or need in order to be supported to volunteer