

<b>Committee:</b> Funding Committee of the Bridge House Estates Board	<b>Date:</b> 11 September 2023
<b>Subject:</b> BHE Chief Funding Director's Update Report	<b>Public</b>
<b>Report of:</b> Sacha Rose-Smith, BHE Chief Funding Director	<b>For Information</b>

## Summary

To support the Funding 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: additional context to the meeting's budget monitoring report, Suicide Prevention work, the Local Motion programme, the BHE and City Corporation's Joint Philanthropy Strategy, City Giving Day, and an update on Impact and Learning. Separate items on today's agenda further provide updates on the Anchor and Propel programmes and the End-to-End Review.

## Recommendations

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates and solely in the charity's best interests:

- i) Note the contents of the report.

## Main Report

### **Bridging Divides Funding Updates**

1. Aanchal Women's Aid – The Committee will be welcoming current CBT grantee Aanchal Women's Aid (No. 1113180) to today's meeting for a presentation and discussion on their work. Established in 1984, Aanchal Women's Aid is a Redbridge-based registered charity that provides support, assistance and advice to Black, Asian and Minority Ethnic women experiencing abuse. The charity is funded by CBT until 2025, for salary costs for a full-time advisor/advocate post, volunteer expenses and a contribution to core costs, to deliver support to high-risk women and their children.
2. Budget Monitoring Report – Additional Context – The report at agenda Item 6 notes a forecasted increase in responsive grant making of £16m (from £49m to £65m). Due to timeline changes in other programmes, the overall spend for the year is still expected to be within the overall approved budget for this financial year. The Funding Directors have closely monitored first quarter spend rate, spend rate YTD, current assessments in hand, and application trends across the last six months to produce this more accurate forecast.
3. When the original budget was prepared in December 2022, it acknowledged the challenge of predicting spend-rates for the year, due to the uncertain post-Covid landscape across the sector. In the preceding 24 months, a number of other funders frontloaded their budgets to provide emergency funding, launched new redirected strategies, or closed their doors to develop new strategies, which added to this unpredictability.

4. The increase in responsive spend is likely due to factors including increasing pressure in the voluntary sector, the continued closure of several significant funders, and the cost-of-living crisis. These factors have led to adjustments in individual grant amounts during assessment (due to increased inflation) an increase in demand for many of the services funded under CBT's responsive programmes, which are significantly focussed around reducing poverty.
5. Furthermore, the introduction of clearer and revised funding criteria and a new website enhanced both the transparency of our funding priorities and searchability and navigation which has led to increased applications. The spend rate in the first quarter is higher than anticipated in the latter quarters due to the closure and reopening of our application portal due to a database switchover, which also led to a surge in applications. Finally, outreach has been stepped up as we have returned to face-to-face funder fairs and increased other forms of outreach, such as programme specific webinars. The increase does not impact in-year or future year grants budgets, and the strategy refresh will examine responsive spend rates in detail to ensure that, as always, in future years funding is only awarded in line with funds available.
6. The budget monitoring report also notes timeline shifts affecting the Anchor Programme and Propel Programme budgets for this financial year. However, other programme reductions lead to expectation of spend being within the overall approved budget.
7. Suicide Prevention – Sacha Rose-Smith, Chief Funding Director, continues to develop this work, supported by Abi Sommers, Funding Manager. Currently in the scoping phase, officers are analysing available data and awaiting the upcoming release of the Government's latest suicide prevention plan. Sacha and Abi are collaborating with the City of London Corporation team which is hosting a suicide prevention conference in October. Sacha and Abi will be hosting a series of roundtables for key stakeholders which will connect with the conference. Plans are also underway to support people with lived experience to feed into the development of the funding programme.
8. LocalMotion – LocalMotion is a collaboration between CBT and five other funders, joining forces to tackle economic, environmental, and social inequality in six places. CBT is aligned to Enfield, and Sacha Rose-Smith, Chief Funding Director, continues to support the ongoing development of this work as part of the Local Core Group in Enfield and as part of the Direct Delivery group. The group are busy finalising their road maps for the next 8 years. The Enfield visit was planned for July but had to be rescheduled, due to underground strikes making travel difficult for those involved. A new date has been rearranged for September; however, we are exploring with LocalMotion the option to combine the Enfield place visit with the forthcoming Learning summit which is planned for November.
9. A combined place visit and learning summit was successfully achieved earlier this year in Carmarthen and enabled those attending to forge a deeper connection and explore practice and learning over two days, also alleviating the necessity of people being asked to travel significant distance in a relatively short period of time. These

dates are likely to be the 14<sup>th</sup> and 15<sup>th</sup> November 2023 and will be confirmed soon. A subsequent report will be brought to the December Funding Committee meeting to set out recommendations regarding CBT's future involvement with LocalMotion.

## **Philanthropy**

10. Following the conclusion of the external consultancy undertaken by Corporate Citizenship and team consultation to support the development of the Joint Philanthropy Strategy review, work is now underway to present options for consideration by the BHE Board and P&R Committees. Officers are currently finalising the dates for when these options will be presented for discussion, noting the interplay between BHE and the Corporation on final conclusions, and the imperative to ensure that costings for subsequent work are provided in good time for sign off through the relevant budgeting and business planning procedures.
11. The Philanthropy Director has shaped an event to mark City Giving Day which is an annual initiative of The Lord Mayor's Appeal on 26 September 2023. The event will focus on EDI developments in funding practice and will include representation from CBF in relation to the learning we are amassing through the development and roll out of the Anchor Programme. Other speakers include London Funders, New Philanthropy Capital (NPC) and Islington Giving. The event will take place in the Basinghall Suite from 14.00 – 15.30 (with 30 minutes of networking afterwards) and all Board Members are welcome to attend. Alderman Professor Emma Edhem will be welcoming delegates in her role of BHE EDI lead, with Deputy Nighat Qureishi concluding proceedings.

## **Impact and Learning**

12. Since the Funding Committee last met in June, Funding Managers have undertaken a further 8 learning visits with organisations funded by CBT. Two of these were attended by the Funding Committee Chair, Paul Martinelli, one by Alderman Alison Gowman and one by the Managing Director of BHE, David Farnsworth. There are a further 10 learning visits currently scheduled.
13. Funded organisations tell CBT that they need space and time to reflect on their work and would like more contact. Learning visits address these needs. Funding Managers carefully plan visits and create a supportive setting by asking open questions that encourage funded organisations to consider challenges, solutions and successes in their work. After visits, Funding Managers and Members reflect on their learning and share insights with BHE colleagues and Members, which informs future decision making.
14. Each Member of the Funding Committee is given the opportunity to attend at least one learning visit per year, to meet staff at funded organisations, hear about their successes and challenges and share thoughts on issues in London. Members are matched with visits according to their interests and areas of expertise. Funding Managers contact Members directly with learning visit suggestions.
15. The ethos of these visits is that of respected colleagues discussing issues of mutual interest, rather than BHE monitoring or checking (monitoring happens

separately), and officers consciously work to reduce the power imbalance between BHE as funder and the funded organisations. Visits to equity organisations are prioritised.

16. In August, Natalie Heath joined the Impact and Learning team as Impact and Learning Officer. Natalie has Psychology and Teaching qualifications and brings valuable training skills gained as a Primary School teacher. She will be planning and delivering Learning activities for staff and funded organisations.

## **Conclusion**

17. This report provides a high-level summary of CBT activities since the Funding Committee last met in June 2023. The Funding 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 Funding Committee orally in the meeting or in written format in advance of or as a follow-up to the meeting.

### **Sacha Rose-Smith**

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