

Committee:	Date:	Item No.
The City Bridge Trust	4 th September 2013	12009
Subject: Strategy for Sharing Learning & Knowledge	Public	
Report of: Chief Grants Officer	For Decision	
<p><u>Summary</u></p> <p>This paper reviews your Learning and Knowledge Sharing Strategy 2012/13 and seeks your approval for the Strategy for the remainder of 2013/14. It sets out a programme of activities that will enable learning from your grant-making to be shared widely within the third sector, amongst other funders, policy makers and key commentators. It seeks your agreement to resource this from your Strategic Initiatives budget for 2013/14.</p> <p style="text-align: center;">Recommendations</p> <p>That:</p> <p>a) you approve the programme of activities set out in this paper;</p> <p>b) you approve a budget of £175,000 to implement the programme to be costed against your budget for Strategic Initiatives 2013/14.</p>		

Main Report

1.0 Purpose

- 1.1 The purpose of this paper is to review your Learning and Knowledge Sharing Strategy for 2012/13 and to seek your approval of the strategy for the remainder of 2013/14.
- 1.2 The paper requests a budget of £175,000 to implement the strategy over the next six months.

2.0 Background

- 2.1 At your July 2010 meeting, you agreed that you have a responsibility to share learning in order to:
- Share good practice and lessons learnt.
 - Build an evidence base to influence policy and add value to grant-making.
 - Inform your grant-making policy.
 - Help applicants avoid duplication and 're-inventing wheels'.
- 2.2 Since then, you have approved an annual Sharing Learning and Knowledge Strategy, usually in April of each year, comprising a year-long programme of activities, costed against your Strategic Initiatives budget for that year.
- 2.3 At the core of your strategy has been a commitment to:
- Commission research into areas of significance to your grant-making and of concern to London in a changing social and economic climate.
 - Host conferences, seminars and other events where learning and knowledge are disseminated.
 - Produce your publication "The Knowledge - learning from London" as a vehicle for sharing learning in bite-sized chunks.
 - Use your website as a learning tool, for example, through video clips showcasing work you have funded.
- 2.4 In April 2012, you approved your Sharing Learning and Knowledge Strategy for 2012/13 with a budget of £124,000 (2010/11 £165,000). Much of the focus of last year, of course, was on the work required to conduct your Quinquennial Review which commenced last spring.
- 2.5 Proposals for the 2013/14 Sharing Learning and Knowledge Strategy are being brought to today's meeting, rather than to the April 2013 meeting, in order that the new Chief Grants Officer could contribute to its content, informed by the outcome of the Quinquennial Review. This paper therefore sets out proposals for the remaining six months of this financial year.

3.0 Review of your Sharing Learning and Knowledge Strategy 2012/13

3.1 Research 2012/13

3.1.1 At your meeting in February 2012, you agreed the process and timetable for your Quinquennial Review. This included the commissioning of 'futures' horizon-scanning research looking at the bigger picture in the post-recession context and in the new austerity. The research covered six key areas:

- Criminal Justice in London.
- Domestic Violence and Trafficking in London.
- London's Educational and Employment Trends.
- London's Voluntary and Community Sector and Volunteering Trends.
- Political Trends Affecting Disadvantage in London.
- The Use of Grant Funding to Enhance the Charitable Sector's Involvement in the Social Investment Market.

3.1.2 The findings of these papers were used to help you identify London's changing needs and where you should target your grant-making over the next five years in order to be most effective.

3.2 Conferences and other Events 2012/13

3.2.1 You may re-call that during 2012/13, you launched a new grants programme, Growing Localities, with an additional £2m in order to mark the occasion of HRH Her Majesty the Queen's Diamond Jubilee. On 5th December 2012 officers organised a seminar for organisations in receipt of a grant on this programme.

3.2.2 The seminar was an opportunity to bring organisations undertaking similar work together to share learning and good practice. Attendees were introduced to your media agency, Champollion, which has worked with your grantees to help them make the most of press and media opportunities. In addition, they met representatives from the Media Trust who talked about the "Telling Your Stories" collaboration (see paragraph 3.6.1).

3.2.3 Positive feedback confirmed that those attending found huge benefit in the learning opportunities provided by the event. Seminars such as this are a great example of how the Trust can add value to its grant-making.

- 3.2.4 Additionally, (although taking place in 2013/14) the Trust hosted a conference on 9th July 2013, in partnership with the Barrow Cadbury Trust, LankellyChase Foundation and nef (New Economics Foundation) entitled "Creative Solutions for Tough Times – practical and local responses to poverty and inequality.
- 3.2.5 You had funded nef jointly with the Barrow Cadbury Trust and LankellyChase Foundation to research how people in two of the most economically disadvantaged parts of Birmingham and Haringey were experiencing the effects of the recession. nef launched the executive summary of its findings *Surviving Austerity* at the conference.
- 3.2.6 The conference provided an opportunity to show case some positive community-led responses to the austerity, including the new model of volunteering, *London Time Credits*, that you are funding.
- 3.2.7 Keynote speaker David Lammy, MP for Tottenham, spoke of the importance of local community, stressing that without community, there can be no enterprise.

3.3 The Growing Localities Awards 2012/13

- 3.3.1 Building on the success of the Growing Localities grants programme, you agreed to commission the social policy consultancy, Lemos and Crane, to develop the Growing Localities Awards in order to recognise and reward projects that use nature to enhance and improve the lives of vulnerable or socially excluded people to bring about positive outcomes such as improved health and well-being.
- 3.3.2 This was an extremely successful initiative with over 100 entrants applying under five different categories. The winners and runners up each received a prize of £1,000 and £500 for their respective projects at a ceremony held at the Barbican Centre in April 2013. It is therefore proposed to repeat the initiative in 2013/14.

3.4 The Knowledge – Learning From London

- 3.4.1 You launched the eighth edition of *The Knowledge – Learning from London* at the awards ceremony referred to in paragraph 3.3.2. (The 'bite-sized' publication that enables the Trust to

share some of the learning gained from its grant-making). *The Growing Localities Awards* edition examined how involvement in environmental projects can bring long term benefits for individuals and communities and showcased the work of the winners and runners up.

3.5 Launch of the City Funding Network

3.5.1 Your 2012/13 Sharing Learning and Knowledge Strategy, included funding for the Funding Network, a giving circle of established philanthropists to develop the City Funding Network, a new giving circle targeting young City professionals, as part of your *City Philanthropy – a Wealth of Opportunity* initiative.

3.5.2 It was launched at a well-attended event hosted by Warner Brothers in July 2012. The most recent event was held in April 2013 at Charterhouse where Dan Snow, the TV presenter and historian, spoke about the impact charitable giving has had on his own life, and on the importance of inspiring a new generation of philanthropists. £23,000 was pledged in 11 minutes to three charities that had made 'Dragon's Den' style pitches about their work.

3.5.3 At your meeting in October 2012, you agreed a new programme of activities for the next three years under the *City Philanthropy* umbrella, including the continuation of the City Funding Network.

3.6. Collaboration with the Media Trust 2012/13

3.6.1 You continued your "Telling Your Story" collaboration with the Media Trust this year, commissioning it to work with 10 of your Growing Localities grantees to train and support them each in producing a short promotional video. These have recently been completed. In addition, the Media Trust produced a film featuring your Growing Localities grantees that was broadcast on the Community Channel on 26th and 28th May 2013. Blue Peter presenter, Chris Collins, appeared in and narrated the film.

3.6.2 Past participants in the collaboration have told us how beneficial the videos have been in helping them promote their work. For example, Age Concern Camden recruited an additional 35 volunteers after releasing the film on YouTube. It also received an anonymous donation of £5,000 as a direct result of someone seeing the video. It is therefore proposed to continue this collaboration in 2013/14.

- 3.6.3 You also commissioned the Media Trust to make 5 short videos on some of the Trust's initiatives to be used on the website. One of these was of the Chairman talking about the history of the Trust and how it works today. Another was made with nef regarding its peer-led research referred to in paragraph 3.2.2. The remaining 3 feature:
- How we support community organisations to make their buildings more accessible
 - How organisations can use monitoring and evaluation to demonstrate that their work is making a difference
 - Your *Greening the Third Sector* programme of eco-audits.

4.0 Learning and Knowledge Sharing Strategy 2013/14

4.1 Research

4.1.2 At your June 2013 meeting, you received a paper with proposed new grant programmes and revised funding policies for the next five years, following the Quinquennial Review. The paper included a proposal for a closed grants programme (that is, applications by invitation only) of capacity building work to help charities become more "investment-ready" and therefore better able to access Social Investment opportunities. However, given that this is a fast-moving environment, you agreed that the Trust should first commission research into current provision in order to identify market gaps. This will enable the Trust to develop a suitably tailored programme of work to support grantees in accessing Social Investment opportunities. It is proposed that the Learning and Knowledge Sharing Strategy for 2013/14 should include a sum of £20,000 for this purpose.

4.1.3 It is 7 years since you commissioned the consultants, Steven Burkeman and Alison Harker, to conduct a stakeholder satisfaction survey to gauge how the Trust was perceived by applicants (both successful and unsuccessful), funders, policy makers and key commentators. The resulting report, *Seeing Ourselves As Other See Us*, highlighted the difficulties, despite the guarantee of anonymity, in eliciting any criticism of the Trust. However, one of the key messages that did emerge was that the Trust should develop a strategy for knowledge management and sharing learning – which you have since implemented, of course.

4.1.2 It is timely that the Trust should review the perceptions of its applicants again. The Centre for Effective Philanthropy (CEP) is

an international body that provides trusts and foundations with comparative data to help them improve their performance through its Grantee and Applicants Perception Reports. To date, CEP has provided more than 250 funders with reports with responses from over 40,000 grantees. The Paul Hamlyn Foundation and Northern Rock Foundation have both completed surveys by CEP which they say they have found immensely helpful.

- 4.1.3 It is proposed to commission CEP to undertake a survey of a sample of 300 of the Trust's grantees which have received a grant during the past 12 months, at an estimated cost of £17,000. This would provide useful baseline data at the start of your new grants programmes for 2013-2018.

4.2 Conferences, Seminars and Events

- 4.2.1 Following the successful completion of the Quinquennial Review, your new programmes are due to be 'soft-launched' at the end of September. It is proposed that the communications strategy for the new programmes will include three targeted seminars over the coming months for external audiences. One would be for key infrastructure bodies in London, national, regional and local, to include a networking lunch. One would target organisations that are likely to be interested in one of your new funding programmes such as Safer London and/or Reducing Poverty, also to include a networking lunch. A third would be a breakfast briefing for other funders from trusts and foundations, local authorities, London Councils and the GLA.

- 4.2.2 It is proposed to organise a learning event for *Growing Localities* grantees in November 2013, with external facilitation. The objective will be to provide a safe and confidential forum where applicants can openly share the challenges as well the successes of their work.

- 4.2.3 It is proposed that the sum of £3,000 is included in the Learning and Knowledge Sharing Strategy for events and seminars.

4.3 Growing Localities Awards

- 4.3.1 As set out in paragraphs 3.3.1 and 3.3.2, the Growing Localities Awards 2012/13 were a great success and it is therefore proposed to continue this partnership with Lemos and Crane in

2013/14. This year, as well as targeting a wide range of organisations, more schools will be encouraged to apply. The Awards Ceremony will be held next spring. The Learning and Knowledge Sharing Strategy includes the sum of £19,300 for this purpose which includes developing the database of contacts; promoting the awards; assessing the applications and drawing up the shortlist; supporting the judging panel; facilitation of the awards ceremony; and the prizes themselves.

4.4 Media Trust Videos

4.4.1 It is proposed that you continue your collaboration with the Media Trust and commission videos of a further cohort of your grantees at a cost of £60,000, as in previous years.

4.5 Programme Evaluation

4.5.1 At your seminar in November 2012, which formed part of the Quinquennial Review, you agreed that officers should commission independent evaluations of your new programmes, in order to increase your learning of what works and to look at the impact of the wider environment on work funded.

4.5.2 A paper with proposed changes to your monitoring and evaluation policies following the Quinquennial Review will be brought to your October meeting. In the meantime, it is proposed to get evaluations underway during 2013/14 of two themes that were already established under your *Working with Londoners* programmes and will continue to be supported once your new programmes are launched, namely work with older Londoners and work on mental health. It is proposed that you include the sum of £20,000 per evaluation in the Sharing Learning and Knowledge Strategy for 2013/14.

4.6 The Knowledge – Learning from London

4.6.1 It is proposed that an edition to complement the *Growing Localities Awards* is published later in the year, authored by Lemos and Crane, at a total cost of £10,500 which includes researching the case studies; writing the copy; liaison with the designers; and promoting the publication.

5.0 Sharing Learning and Knowledge Budget 2013/14

5.1 Table 1 sets out the proposed learning and sharing activity for the remainder of 2013/14 and the cost. These costs are based on our best estimates and may be subject to change. A contingency sum of £5,200 has therefore been included in the budget.

Table 1

ACTIVITY	NUMBER	TOTAL BUDGET
Social investment market research	1	£20,000
Stakeholder perception research	1	£17,000
Promotion of new programmes & Growing Localities Learning Event	4	£3,000
Growing Localities Awards	1	£19,300
Media Trust work with CBT grantees.	10	£60,000
Programme evaluations	1	£40,000
"The Knowledge – Learning from London".	1	£10,500
Contingency		£5,200
TOTAL		£175,000

6.0 Allocation from Strategic Initiatives

6.1 It is proposed that the cost of £175,000 is charged against your 2013/14 allocation for Strategic Initiatives of £747,500 (5% of the overall grants budget). If you approve this request, there will be a balance of £188,613 remaining for the rest of the year (see Table 1 overleaf).

Table 1: Strategic initiatives 2013/14

Strategic Initiatives	Committee date	£
Allocation of 5% of 2013/14 grants budget		747,500
Already agreed in this financial year:		
Access and Sustainability Service	18/04/2013	192,900
Ladder for London	06/06/2013	84,230
Lord Mayor's Show	06/06/2013	29,227
City Philanthropy Book	06/06/2013	15,000
Web-based database of volunteer intermediaries	04/07/2013	6,000
	Total	327,357
Recommended at this meeting		
Youth & Philanthropy Initiative		48,330
Practical Guide for Charity Chairs		8,200
Learning & Knowledge Sharing Strategy 2013/14		175,000
Balance remaining		188,613

7.0 Conclusion

- 7.1 The Learning and Knowledge Sharing Strategy you have adopted has enabled you to make better use of the learning and knowledge you derive from your grant-making, thereby adding value to what you do.
- 7.2 In the current economic climate, it is more important than ever that you use your intellectual capital in order to add value to your grant-making.
- 7.3 You have gained a reputation for organising high quality learning events, seminars and conferences, all of which receive consistently positive feedback.
- 7.4 You have been commended for your commitment to sharing learning and knowledge widely because this ensures that your grant-making is underpinned by an understanding of good practice in the sector and by lessons learnt. With the launch of your new programmes, it is timely to re-affirm this commitment and ensure that it is appropriately resourced.

Recommendations

That:

- a) you approve the programme of activities set out in this paper;
- b) you approve a budget of £175,000 to implement the programme to be costed against your budget for Strategic Initiatives 2013/14.

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