

Committee:	Date:
The City Bridge Trust	3 rd October 2013
Subject: Progress Report	Public
Report of: Chief Grants Officer	For Information
<u>Summary</u>	
This is a regular Progress Report by the Chief Grants Officer.	
Recommendation	
That you receive this report and note its contents.	

Main Report

1.0 New Grants Programme – Investing in Londoners

- 1.1 Work has continued apace in the run up to the launch of your new grants programmes, Investing in Londoners. All continues to go to plan, although the 'soft launch' will now take place during the week commencing 23rd September, rather than on the Monday morning; as we have recently been informed of a major IT upgrade to take place on 22nd September; and we wish to be sure there is no disruption to the new fully-online application process.
- 1.2 The mixed media communications strategy developed to promote your new Investing in Londoners programmes will begin to roll out from the week of the soft launch. Working with the Public Relations Office, a press release has been prepared and an interview secured with Third Sector Magazine.
- 1.3 Further dissemination of the Investing in Londoners grants criteria will include electronic dissemination through voluntary, community and statutory sector networks; presentations to appropriate networks such as to the East London Community and Voluntary Services' Directors' Network Forum; letters to London MPs and funders; along with an internal communications programme including an interview in the staff magazine and a lunchtime presentation by the Chairman and the Chief Grants Officer to Members, on 7th October.
- 1.4 The move to a fully-online application process has given officers the opportunity to update and improve the way application forms appear in your papers. The new Investing in Londoners application form takes account of what worked well and less well in the Working with Londoners

application form, as well as recommendations arising from the 2012 review by Internal Audit. A draft is appended to this report for information at Appendix A.

2.0 Media Work

2.1 City Philanthropy – a wealth of opportunity

Your City Philanthropy Manager, Cheryl Chapman has continued to work closely with the media agency, Champollion, alongside the Museum of London and Charterhouse, to implement the media strategy for the forthcoming City Philanthropy exhibition which opens at the end of October 2013.

2.2 This has included collating a number of quotations from high profile philanthropists that can be used in articles; collating case studies and supporting photographs; compiling a list of 10 top philanthropy facts producing a poll to gauge attitudes to philanthropy and approaching a number of media outlets, in particular, those with long lead-in times. Social media will also be used.

2.3 Growing Localities and London Parklife

Champollion has continued to work on the Parklife London website (www.parklifelondon.org), which you are developing as part of your Growing Localities Initiative. This is an interactive website mapping London's green spaces. It was re-launched during week beginning 16th September with all 12 inner London boroughs now populated with over 900 open spaces. It is also available as a tablet and mobile phone app.

2.4 English Heritage's Kenwood House and the London Wildfowl and Wetlands Trust are also publicising the site and providing content. Data sharing agreements are being developed with London Play and the Federation of City Farms and Gardens. It is hoped that London Wildlife Trust will also enter into such an agreement.

2.5 At the time of writing this report, the site had been open for two days and had received 144 unique visits and 156 visits in all. 37% of traffic so far is on mobile/tablets. 66,824 twitter accounts have been reached over the two days. Four London bloggers are due to publish posts about the site during the week. It was referenced in the Evening Standard on 19th September 2013.

2.6 Get Young People Working – the Youth Offer

Public Relations Office has been working closely with the Trust on media coverage for this initiative, working on press releases with the 32 local authorities concerned to get coverage at the local level.

3.0 Return on Investment

- 3.1 Following your July meeting, a Member noted that one applicant had engaged an economics consultancy to calculate the value of the work they delivered. The calculation was expressed through a 'return on investment' (ROI) metric, estimating how much value the charity was able to generate for each pound it spent. You asked officers to consider whether Committee might use similar metrics to evaluate other applications to the Trust, and whether the Trust could commission a study of its own ROI.
- 3.2 ROI is one metric amongst many developed in recent years by the charity sector to demonstrate value and effectiveness. In large part, work on metrics has been driven by an increasingly competitive fundraising environment. It is no longer sufficient for organisations to report what they have done (their outputs), at a minimum funders expect them to present evidence of the difference their work has made (i.e. their outcomes).
- 3.3 There has been considerable effort over the past five years in building the charity sector's skills in assessing, analysing and communicating impact, and you have played an important role here through your "Strengthening the Third Sector" programme which has directed funding to high-quality support organisations like Charities Evaluation Services and Pro Bono Economics.
- 3.4 One lesson that has emerged from this effort is that, since the charitable sector is diverse both in size and focus of organisations, no one single monitoring and evaluation tool is the 'right solution' for gathering evidence of impact. What works for an international charity with a turnover in excess of £200m may not be good for a small community organisation run by volunteers.
- 3.5 Although there may not be any one 'best tool', a lot of work is being done around standards of evidence. Some of this work includes efforts to apply a monetary value to the work delivered by charitable organisations, and this is known as 'monetisation'.
- 3.6 Monetisation has its roots in work done by economists to quantify social benefits which do not otherwise have market values. This applies costs to the inputs required for an activity, before comparing them with the estimated value of the outputs and outcomes of a charity's work. The comparison leads to a metric usually expressed as "for every pound spent, Charity A creates Y points of social value".
- 3.7 Monetisation can be extremely useful in certain contexts. It tends to work best for organisations with a specific geographical focus, with a limited range of services, strong existing monitoring and evaluation systems, the resources to purchase expert economic analysis, and access to data sets that put a cost value on the problems they work to address

(such as re-offending costs, healthcare services, and educational interventions).

- 3.8 It tends not to work so well for newly established organisations with limited track record, those whose work takes place across a large geographical area where it would be very difficult to consider all associated variables, those delivering preventative services or delivering services where it may be some time before the outcomes can be properly assessed (e.g. some health care or educational interventions).
- 3.9 Monetisation would not be appropriate for many of the small and medium-sized charities who approach you for funding. They would not necessarily have the resources to afford such a study, and to do so cheaply would result in metrics of questionable quality. Some larger organisations may benefit from calculating their social return on investment, but this would be on a case by case basis depending on the nature of the work they deliver.
- 3.10 Metrics will only help Members and officers to assess applications if we can be confident of the input data. Whilst financial accounts benefit from the expert input of a Treasurer and auditor / independent examiner, there is no professional standard for social return on investment. This means that any social ratio presented would need to be carefully analysed, and its accuracy determined. This would be time-consuming and costly to the Trust.
- 3.11 We would therefore recommend that the Trust does not require applicants to monetise their social return on investment, but rather require evidence both of a commitment and capacity to achieve and assess impact; and that this should be the continued focus of the grant assessment work done by officers at the pre-Committee stage.
- 3.12 In some instances where organisations fit the criteria referred to in 3.7 above they may present a ROI metric and we will of course consider this in our assessment and presentation to you.
- 3.13 Regarding the possibility of the Trust commissioning an evaluation of its own ROI, your grants create significant benefit for London including, but not limited to: employment creation; increased participation by disabled people in public life; improved community cohesion; improved mental health; enhanced green and brownfield spaces; reduced strain on public health care; and a stronger charitable sector.
- 3.14 This work takes places across 32 boroughs as well as the City of London, and involves over 300 organisations each year
- 3.15 It is easier to calculate the social value of some of this work than others. For instance, the return on funding to improve mental health outcomes for rough sleepers can be examined with reference to cost-savings made

to acute psychiatric care budgets, as well as associated professional time such as police and street outreach teams. In some instances, even though work is clearly very important and does generate benefit, it can be very hard to calculate, for example, the value of work that improves relationships between two otherwise divided communities.

- 3.16 As with the majority of large funders who support work across several varied programmes it would be very difficult for us to produce a sensible figure on the social return generated by our funding across the board. We would only be able to produce a credible figure if we received reliable data from all our grantees and they all had the characteristics referred to in 3.7 above: this is not the case. The margin for error on any figure would therefore be too high.
- 3.17 Rather than attempting to estimate overall ROI, we are planning enhanced monitoring and evaluation across your grant programmes. These proposals are outlined in detail in a separate paper presented to you today, and will improve your capacity to consider the impact of your grant programmes on Greater London.

4.0 Volunteering Database

- 4.1 You may recall that at your July committee meeting, you approved a grant of £6,000, as a Strategic Initiative, to enable the Coalition for Efficiency to develop a web-based database and widget that would bring together the various volunteer intermediary bodies in one place, and lead to greater collaboration among them. At the meeting, you asked for confirmation of the timetable for the project and that the Trust be given due recognition for its funding.
- 4.2 Development and testing of the platform is due to take place over the coming months with launch of the website being planned for February 2014. The charity has confirmed that it is delighted to acknowledge the support of the Trust.

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Report written: 18th September 2013

Appendix A

The City Bridge Trust



Investing In Londoners:
Application for a grant

About your organisation

Name of your organisation:	
If your organisation is part of a larger organisation, what is its name?	
In which London Borough is your organisation based?	
Contact person:	Position:
Website:	
Legal status of organisation:	Charity, Charitable Incorporated Company or company number:
When was your organisation established?	
Aims of your organisation:	
Main activities of your organisation:	

Number of staff

Full-time:	Part-time:	Management committee members:	Active volunteers:

Property occupied by your organisation

Is the main property owned, leased or rented by your organisation?	If leased/rented, how long is the outstanding agreement?

Environmental Impact

<p>City Bridge Trust wants to help voluntary sector organisations to have a positive environmental impact. Please tell us how much your organisation is already doing to have a positive environmental impact using the definitions below to help you decide.</p>

Grant Request

Details of grant request

Under which of City Bridge Trust's programmes are you applying?
Which of the programme outcome(s) does your application aim to achieve?
Please describe the purpose of your funding request in one sentence.
When will the funding be required?
How much funding are you requesting? Year 1: £ Year 2: £ Year 3: £ Total: £
Do you plan to continue the activity beyond the period for which you are requesting funding? If so, how do you intend to fund it?
If you need any planning or other statutory consents for the project to proceed, what stage have the applications reached?

Summary of grant request

Please summarise what your grant request is for. This should include: the need for the project; how the work will be delivered; what your project will aim to achieve; why you are the right organisation to deliver the work; how your project will meet the Trust's programme outcome under which you are applying; how your project meets the Trust's 'Principles of Good Practice'.

Outputs and outcomes

What are the main activities or outputs you want to deliver? Please include no more than 5. By activities or outputs we mean the services, products or facilities you plan to deliver. If you plan to deliver work over more than one year you should include activities over the full grant period requested. Try to be specific.

What main differences or outcomes do you hope the activities you have described above will achieve? Please include no more than 5. By differences or outcomes we mean the changes, benefits, learning or other effects that result from the work your project would deliver. These might be for individuals, families, communities or the environment.

Who will benefit?

About your beneficiaries

How many people will benefit directly from the grant per year?
In which Greater London borough(s) or areas of London will your beneficiaries live?
What age group(s) will benefit?
What gender will beneficiaries be?
What will the ethnic grouping(s) of the beneficiaries be? If Other ethnic group, please give details:
What proportion of the beneficiaries will be disabled people?

Funding required for the project

What is the total cost of the proposed activity/project?

Expenditure heading	Year 1	Year 2	Year 3	Total
TOTAL:				

What income has already been raised?

Source	Year 1	Year 2	Year 3	Total
TOTAL:				

What other funders are currently considering the proposal?

Source	Year 1	Year 2	Year 3	Total
TOTAL:				

How much is requested from the Trust?

Expenditure heading	Year 1	Year 2	Year 3	Total
TOTAL:				

Finance details

Please complete using your most recent audited or independently examined accounts.

Financial year ended:	Month:	Year:
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Income received from:	£
Voluntary income	
Activities for generating funds	
Investment income	
Income from charitable activities	
Other sources	
Total Income:	

Expenditure:	£
Charitable activities	
Governance costs	
Cost of generating funds	
Other	
Total Expenditure:	
Net (deficit)/surplus:	
Other Recognised Gains/(Losses):	
Net Movement in Funds:	

Asset position at year	£
Fixed assets	
Investments	
Net current assets	
Long-term liabilities	
*Total Assets (A):	

Reserves at year end	£
Endowment funds	
Restricted funds	
Unrestricted funds	
*Total Reserves (B):	

*** Please note that total Assets (A) and Total Reserves (B) should be the same.**

Statutory funding

For your most recent financial year, what % of your income was from statutory sources?

Organisational changes

Describe any significant changes to your structure, financial position or core activities since the date of your most recent accounts:

Previous funding received

Please list the funding received by your organisation from the following statutory sources during the last THREE years.			
	2010 £	2011 £	2012 £
City of London (except City Bridge Trust)			
London Local Authorities			
London Councils			
Health Authorities			
Central Government departments			
Other statutory bodies			

Previous grants received

Please list the grants received by your organisation from charitable trusts and foundations (other than City Bridge Trust) during the last THREE years. List source, years and annual amounts. Please include the 5 largest only.			
Name of Funder	2010 £	2011 £	2012 £