

<b>Committee:</b>	<b>Date:</b>
The City Bridge Trust Committee	22 January 2015
<b>Subject:</b> Strategic Initiative – City Bridge Trust 20 <sup>th</sup> Anniversary	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

### **Summary**

This report proposes an outline of plans to mark the City of London Corporation's Charity, the City Bridge Trust's 20<sup>th</sup> Anniversary Year 2015-2016 (financial year):

- The Trust's past and current work is reviewed to inform its future;
- The Trust makes some additional strategic grants and launches an improved 'funder plus' offer, and learning programme;
- The Trust raises the profile of the Trust's grantees' work, and its own, with target audiences.

### **Recommendation**

Members are asked to:

- a) Approve the outline of the plans to mark the 20<sup>th</sup> Anniversary Year;
- b) Agree to release £62,000 from the Central Risk budget to support the 20<sup>th</sup> Anniversary Year, by way of Strategic Initiative. This comprises:
  - £24,000 towards project management
  - £20,000 towards communications
  - £4,000 for design (strap line and refreshed leaflets)
  - £9,000 to develop learning programme, including 20<sup>th</sup> year review.

## **Main Report**

### **Background**

1. The City of London Corporation's charity, the City Bridge Trust, is founded on over 800 years of bridging London's communities. The 2015/2016 financial year will be the Trust's 20<sup>th</sup> anniversary of grant-making: over one third of a billion pounds will have been given in grants to tackle disadvantage in London, and it is proposed to mark this anniversary.
2. This paper builds on your discussion at the CBT Committee Members away-half day last October, and your further discussion following the November 2014 CBT Committee meeting.

## **The Proposal**

3. It is proposed that the 20<sup>th</sup> anniversary will involve reviewing the Trust's past and current work to inform its future. This will largely be about building on existing work rather than initiating a whole new programme of activity. The following outcomes will be achieved:
  - A more effective grant making operation;
  - More strategic grant-making;
  - Better supported grantees, including more joining up of learning across the grants portfolio;
  - A stronger profile for the Trust's grantees work, and its own, with target audiences.

## **Review/Analysis**

4. The key successes and challenges of the Trust in the last 20 years will be reviewed and captured. It is proposed that these may be distilled into 20 case studies/lessons learnt: these will inform both the annual review and a related publication/visual material.
5. The operating environment of London in 2015 will be reviewed, with particular focus on the shifting lines between the private sector, the voluntary and community sector, and the statutory sector. The impact of austerity; the post-election spending review; and the 2016 London Mayoral election and devolution agendas will be considered. The Trust's vision, mission, and values will be reviewed in light of the operating environment review above.
6. The Trust recently completed its communications plan review. The 'funder plus' review and the grants process review are underway, with completion planned for the end of March 2015. The learning review is planned to begin in the next two weeks, with a similar end date. These reviews will be concluded in time for the 20<sup>th</sup> Anniversary and the arising actions will be included in the 2015-2016 business plan for launch/implementation during the anniversary year.
7. The Trust's website is being reviewed, ensuring it enables learning and collaboration, whilst better profiling the work of the Trust's grantees. Messaging to reflect the 20<sup>th</sup> anniversary will be uploaded for 5 April 2015.

## **More Strategic Grant-Making**

8. At the beginning of the 20<sup>th</sup> Anniversary Year, your £10M strategic grant to the Prince's Trust to support some of the most disadvantaged young people in London will begin. Also, your innovative £1M 'Stepping Stones' strategic grants programme to support charities to explore the possibility of social investment finance will announce its first cohort of grantees. Both of these are opportunities to showcase the work of the grantees and the Trust.

9. In addition to existing commitments, it is proposed that further 20<sup>th</sup> anniversary strategic grants will be agreed: the Team is currently considering proposed themes/criteria, and these will be put to your March and May Committees. The amount of money available for such strategic grant-making will depend on the balance of funds you agree for your Investing in Londoners grants programmes (from last year's carry forward, and as discussed in your CGO's report), and also if any further money is available from Bridge House Estates. Ideas under consideration include:
- Core funding to grantees with a track-record of delivering against CBT priorities;
  - Grants with a geographic focus in one or more of the areas with high destitution and lower grant spend – e.g. Barking & Dagenham;
  - Grants with a thematic focus such as: 'Tackling Loneliness In London'; 'Growing Localities Two' (building on the success of the previous round); Inclusion work in both youth services and major arts institutions; and work to further strengthen the voluntary sector through skills based capacity building.

### **Better Supported grantees: Funder Plus & Learning Programme**

10. Your grants fund between 500 – 600 not-for-profit organisations at any one time, across London, to tackle disadvantage. In addition to these grants you support work which builds skills and resilience to help these organisations become stronger and more effective in carrying out their core business. This work is referred to as 'funder plus' (in line with terminology used by other grant-making trusts). The offer to organisations is currently being reviewed, and plans will be put to you in your May meeting with a view to launching the new offer by September 2015.
11. Within your grants portfolio you are funding some extraordinary organisations to do some extraordinary work. There is considerable expertise and examples of good practice. However, often there is not the time for this to be shared across London within organisations, between funded organisations, and also amongst funders and other target audiences.
12. In the Trust's 20<sup>th</sup> Anniversary year, it is intended to build on the lessons of the last 20 years to launch a learning programme which will enable better sharing of lessons: this will make better use of the Trust's convening capability, its privileged over-view of the community and voluntary sector in London, and its links with the statutory and private sectors. It will work with other funders where possible/appropriate, in particular London Funders, Trust for London, the Baring Foundation, and the Association of Charitable Foundations).

### **A Stronger Profile of the Trust's Grantees' Work, and its Own.**

13. The 20<sup>th</sup> Anniversary will be the launch pad for the Trust's new communications plan (as part of this, the Trust will have a clear elevator pitch - able to express with succinct clarity what it does, why it does it, and how it

does it). The work of our grantees and the Trust will have a raised profile in London with the target audiences referenced in the plan.

14. The 20<sup>th</sup> Anniversary will have a distinct logo and strap line (for use on the website; social media; email sign offs and stationery). The line proposed is:

- **The City of London Corporation's charity, City Bridge Trust: '20 years of Investing in Londoners'** with the possible rider (***One third of a billion pounds of charitable giving to London, and counting...***)

15. The 20<sup>th</sup> Anniversary will generally not seek to initiate new events, but rather to amplify/ co-brand/partner on events that are due to happen anyway. Between 8 and 12 events are currently under discussion.

#### **Resources:**

16. In order to deliver the 20<sup>th</sup> Anniversary Plan, the Trust will need the following resources:

- Grants (already secured and subject to individual scrutiny and committee decision)
- Specific events/initiative funds (e.g. for Youth inclusion event; Arts inclusion initiative) – these will be considered on a case by case basis in the lead up to each event.
- Stepping Stones Fund (already secured)
- Funder Plus review and launch (already secured and underway)
- 20<sup>th</sup> Anniversary Project Management (including events co-ordination)
- Communications: support from Champollion to complement in-house resource/PRO - £20,000
- Website refresh – to be considered when the review is complete and the extent of external expertise needed is quantified
- 20<sup>th</sup> Anniversary Year project management - £24,000
- Design work on the strap line and refreshed leaflets - £4,000
- £9,000 to develop the learning programme, including 20<sup>th</sup> year review.

**17. You are recommended to agree to release £62,000 from the Central Risk budget to support the 20<sup>th</sup> Anniversary Year, by way of Strategic Initiative. This comprises:**

- **£24,000 towards project management**
- **£20,000 towards communications**
- **£4,000 for design (strap line and refreshed leaflets)**
- **£9,000 to develop learning programme, including 20<sup>th</sup> year review.**

18. You will note that if you agree to this today, the level of strategic grant making referred to in your Grant Applications Statistical Report will increase by £62,000 and the new balance would be reflected in the figures presented in your March report.

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