

Committee	Dated:
The City Bridge Trust Committee	12 March 2015
Subject: Progress Report	Public
Report of: Chief Grants Officer	For Information and Decision

Summary

This is a regular progress report by the Chief Grants Officer

Recommendations

Members are asked to:

- (i) To agree the revised City Bridge Trust (CBT) Vision, Mission, and Values**
- (ii) To agree the elevator pitch and 20th Anniversary Strapline**
- (iii) To suggest questions for inclusion in the q & a section of your communications briefing.**

Introduction

1. You will recall that you decided that you would like each of the CBT Committee Meetings to centre on a particular aspect of the work you support, in addition to the regular business that needs to be accomplished.
2. This report will therefore begin by focusing on your first chosen theme, Strengthening London's Voluntary Sector, before providing you with your regular update.

Strengthening London's Voluntary Sector

3. Throughout CBT's 20 years of existence, as well as making grants targeted to support specific beneficiaries, you have consistently supported work and organisations that focus on the resilience and capacity building of the voluntary sector more generally. This has primarily been delivered in the following ways:
 - Grants to so-called second tier organisations – i.e. those supporting frontline organisations to be more effective
 - Grants to organisations committed to developing and supporting volunteering
 - Supporting individual grantees to improve their skills and expertise through a 'funder plus' programme i.e. resources beyond the direct grants such as training and consultancy support to improve financial or evaluation skills

4. To date you have invested £43m in your work to Strengthen London's Voluntary sector. Since the launch of your Investing in Londoners grants programme in 2012, you have invested £2.3m in this area of work and it has accounted for 15% of your total grants spend across the programmes (please refer to table 2 of your regular stats report for more detail)

The Work Continues

5. Your Chief Grants Officer's most recent 'Friday visit' was a timely reminder of the value of this area of work. The visit was to Interlink Foundation, the north London umbrella body for the charity working to support charities working with the Orthodox Jewish community. This second tier organisation has a crucial role to play in supporting a large number of organisations working with a particular community, the Orthodox Jewish community, whilst enabling that community to keep connected with other local communities, and the broader Voluntary and Community Sector. Examples of their work include the work you are currently funding which is successfully bring Orthodox Jewish voluntary organisations into collaborative partnerships with mainstream voluntary and statutory bodies.
6. The organisation is but one example of an organisation that CBT has supported in various ways over a sustained period of time (taking into account requisite period sin grants funding). The impressive Chief Executive spoke of how crucial CBT's commitment to the organisation has been in terms of its development, and how the support has translated into real benefits to end users: organisations supporting disadvantaged people in the community, supported by Interlink, had matured to become sustainable, effective organisations, addressing disadvantage at a local level.
7. A full list of the grants that you are currently funding under your Strengthening London's Voluntary Sector theme are included at Appendix 1.

Context

8. The unprecedented level of local authority spending cuts is already having an impact on the level of support and services available for Londoners, and also the level of grant funding available. CBT now finds itself as the largest independent funder in London now that the London Councils grants budget has been reduced from £28m to £10.5m.
9. This context of growing demand for support with shrinking resources, combined with the quickening pace of social, economic, and technological change is a UK-wide phenomenon. It prompted the National Association for Voluntary and Community Action (the national membership body for local infrastructure supporting their members in their work with over 160,000 charities throughout the country) to set up an Independent Commission on the Future of Local Infrastructure. This Commission has just reported its findings and was chaired by your former Deputy Chief Grants Officer, currently Chief Executive of the Barrow Cadbury Trust. The full report may be downloaded at

www.navca.org.uk/commission-report and a summary of the report is attached at Appendix 2.

10. The report and summary include recommendations for local infrastructure organisations; central and local government and local commissioning bodies; the business community; and independent funders. The key recommendations for the latter category are set out below:
 - Offer longer-term funding for infrastructure organisations or functions to support social action in local areas. Funding should not be focused solely or primarily on innovation;
 - Collaborate with other funders to maximise impact and to help infrastructure bodies make more effective use of new forms of organising social action and the changing world of social finance;
 - The Big Lottery Fund should use its influential position as a funder of social action to convene round table, with funders and infrastructure bodies, to consider how to enable the redesign of infrastructure bodies; and consider extending the Big Assist initiative to enable more infrastructure organisations to access support;
 - Offer short-term funding to support the redesign local infrastructure bodies
11. CBT is already working with other funders, through London Funders, to consider the findings of this report within the London specific context. The Director from London Funder's, David Warner, and the Director of the Cranfield Trust, Amanda Tincknell, have both been invited to speak to you at your committee meeting and answer your questions on this important area of work.

The Way Forward

12. Given CBT's track-record in this area and that CBT and London Councils are the two largest funders of Voluntary sector infrastructure in London, we have a responsibility to be at the forefront of these discussions to ensure your grants are made to best effect. CBT is particularly well-placed to further assist in this area with the City of London Corporation as the trustee of Bridge House Estates, and its locus between the Voluntary and Community sector, the private sector, and the statutory sector can only assist this. Further, your involvement in grant making, social investment and increasing philanthropy is helpful. CBT can play an important role in both bridging sectors and funding streams.

General Update

London's Giving

13. You may re-call that you were a founder funder of Islington Giving, an initiative led by the Cripplegate Foundation that has created a unique partnership of funders, from both independent trusts and the private sector. It aims to encourage the giving of more time and money in order to tackle

poverty and isolation in LB Islington and to date it has considerable success in leveraging additional resources, including:

- Over £2m to support charitable work in the borough.
 - More than 1,300 volunteers involved.
 - A £300,000 partnership with the Arsenal Foundation as part of its celebration of 100 years in Islington.
14. Building on this success, you approved a grant of £220,000 over 2 years in February 2014 part of which (£120,000) is to support the further development of Islington Giving. The remaining £100,000 is to support the development of local giving schemes in other parts of London.
 15. The development, entitled London's Giving, is being led by London Funders. Two consultants were engaged in August 2014 to work with potential new Giving boroughs to support them in developing their own Giving partnerships and infrastructure. Learning from Islington Giving and from other place-based initiatives such as Love Kingston and Kensington and Chelsea Foundation, it is clear that a 'one-size' blueprint will not work and that locally tailored developments are needed. The work is being overseen by a reference group, of which the Deputy Chief Grants Officer is a member.
 16. Considerable interest and appetite has been shown in a number of London boroughs. A London's Giving network to enable knowledge and expertise to be shared was launched at a learning event on 24th February 2015, chaired by your Chief Grants Officer. London Funders has provided a platform for London Giving which can be accessed here:
<http://www.londonfunders.org.uk/londons-giving-0/about-londons-giving>
 17. It is anticipated that a strategic initiative proposing that you fund East End Community Foundation to consolidate the establishment of Hackney Giving and to develop Newham Giving and Tower Hamlets Giving (currently in an embryonic stage) will be brought to your next meeting.

City Philanthropy

Research with Cass Business School

18. Between February 2015 and June 2015, City Philanthropy is undertaking a major piece of research with Cass Business School, aimed at a better understanding of the extent of philanthropic engagement amongst young employees in the City, and how it might be promoted. It will gather information on current trends and patterns, explore potential generational differences, experience of philanthropy, motivation to get involved or reasons for failure to get involved, factors which triggered or inhibited involvement, and what might increase philanthropic engagement across the capital. It will particularly focus on exploring models for effective support for city employees such as through their individual 'philanthropic journeys', and the role which employers and other networks and organisations, whether professional, voluntary or social, might play in supporting them.

Launch of donorWISE workshop on effective giving for City Millennials

19. On 3rd March 2015, City Philanthropy will be piloting a half-day 'donorWISE' (Well Informed, Strategic & Engaged) workshop aimed at introducing philanthropy to City Millennials (aged between early 20s and early 40s). It takes place at Cass Business School.
20. This 'philanthropy in a nutshell' workshop will equip donors with an awareness of effective giving and provide key strategies to achieve the most from it, both personally and professionally. Participants will be signposted on to active giving opportunities through the various City networks that exist for millennial (those born between 1981 and 1991) philanthropists.
21. This course is an essential primer for young people who want to make their mark on the world and join with like-minded people and inspiring charities. It will also be of interest to HR leaders and anyone involved in developing the next generation of leaders or who runs a business and wants to engage and develop their staff.

Launch of Inspired 50 (www.inspired50.com), a network of adventure philanthropists

22. CBT, as part of City Philanthropy, seed-funded a new network that champions an exciting way to be involved in fundraising and giving called **Inspired 50**. It is a network made up of 50 'adventure philanthropists' from the City who go 'the extra mile' to raise money for causes they care about in the communities they visit. They cycle through countries, climb mountains, run deserts and row oceans while engaging themselves with local charities. This exciting network has already raised thousands of pounds and formally launches on February 16 at Glaziers Hall. We plan to hold City events featuring these inspiring 'adventure philanthropists' to engage more City professionals to follow in their footsteps.

Wembley National Stadium Trust

23. Members will recall that for the past three years CBT has been providing full management and administration for the Wembley National Stadium Trust, with one of your senior staff, Stewart Goshawk, seconded as the WNST Chief Executive. The current contract for the service expires on 31st March 2015. The WNST board has expressed a high level of satisfaction with what has been achieved and has invited CBT to tender to extend its contract. Following negotiations, a new three year agreement has been concluded, as before on a full cost recovery basis. The Chairman and Deputy Chairman were kept informed during the process.
24. The main change in the working arrangement sees Stewart increasing his seconded hours from 3 days per week to full-time, taking account of the planned increased workload over the coming period. (This change has no effect on CBT, given that Stewart has been working elsewhere for 2 days per

week). Over the next year, in addition to the existing grants programmes supporting community sports activities in LB Brent and disability sport across Greater London, WNST will be developing new work in other parts of England, reflecting the fact that Wembley is the English national stadium.

25. You will, of course, be kept informed of progress over the coming years.

Increasing access to Arts Institutions for Adults with learning disabilities

26. You will recall that you commissioned Lemos & Crane in 2014 to research the current position regarding access to the major arts and cultural institutions in London (e.g. galleries and museums) for adults with learning disabilities. A report on the key findings has been produced and is available for Members on request. The research has stirred interest within the sector, including a recent (supportive) article in *The Stage*.
27. While there are some pockets of good practice, indeed some excellent work (e.g. LSO), on the whole there are significant gaps in the "offer" made by these institutions for this cohort. This is not deliberate but merely an oversight in most cases and, in some, perhaps some propensity (conscious or otherwise) to turn a blind eye in the absence of clear knowledge as to how to tackle the problem – including the fear of "doing the wrong thing".
28. Early feedback from those organisations consulted and from other funders (including the Arts Council, Heritage Lottery, Paul Hamlyn Foundation) shows a genuine appetite for addressing this issue. There is both scope and appetite to act on the findings of this research, namely: to share the good practice that already exists; to help more organisations develop and implement their practice; and for funders to work collaboratively to both encourage and, where necessary, enforce good practice.
29. Arts organisations which have expressed interest in supporting the development of innovative and exemplar projects include: British Museum; British Library; Tate; British Council; The Old Vic; National Gallery; London Symphony Orchestra; Whitechapel Gallery; Victoria & Albert Museum.
30. Officers intend to bring a detailed proposal to your May Committee which will outline a plan-of-action to progress this issue over the next three years. The project will form part of your specific 20th Anniversary activities given that it builds on the excellent work of the Trust over the past 20 years in supporting the greater inclusion of disabled Londoners.

Communications

Branding

- 31 At your last meeting, it was agreed that officers would provide a draft 20th Anniversary Year Strapline and an elevator pitch. The following draft strapline is proposed:

City Bridge Trust: celebrating 20 years of investing in Londoners.

32. The elevator pitch will need to reflect the Trust's vision, mission and values and it is proposed that these are updated to better mirror the Trust's operations today. The current statement of vision, mission and values is as follows:

Vision: to work for change to benefit the people of London.

Mission: to address disadvantage by supporting charitable activity across Greater London through quality grant-making and related activities within clearly defined priorities.

Values: independence, inclusion and fairness.

It is suggested that this is updated to read:

Vision: a fairer London

Mission: to support disadvantaged Londoners through grant-making, social investment, encouraging philanthropy and influencing public policy.

Values: independence, inclusion and integrity.

Below is the suggested elevator pitch.

The City of London Corporation's charity, City Bridge Trust, is London's largest independent grant-maker. We fund a broad range of work focused on tackling disadvantage in London: from improving Londoner's mental health to improving London's environment; from supporting community garden schemes to supporting survivors of hate crime.

33. Your views and feedback on the proposals for updating the Trust's vision, mission and values, together with the anniversary strapline and elevator pitch, would be appreciated.
34. In addition, officers suggest a set of Questions and Answers are drawn up to support the elevator pitch. As a first step, a set of proposed Questions is

listed below. Again, Members feedback as to whether these are the right questions would be appreciated.

Q: Where does City Bridge Trust's money come from?

Q: How do you decide on what to spend your money?

Q: How do you know your grants make a difference to Londoners?

Q: What is the relationship between the City of London Corporation and City Bridge Trust?

Q: How do we apply for funding?

Q: How much money do you give away?

Q: Would you fund X project?

Q: What is *City Philanthropy: a wealth of opportunity*?

Q: What is social investment?

Q: What social investments have you made?

35. It is proposed that, subject to your views on the above, a short, sharp 20th anniversary communications briefing paper is circulated to you by the end of March which will include the agreed versions of the above, along with key messages, and a time line of 20th Anniversary events. It is proposed that your annual dinner on 30th June would be an appropriate time, to set out your 20th Anniversary stall. This will also allow strategic grant themes and detail to be considered at your May 2015 meeting.

Press Coverage

36. Since your last meeting, the following media coverage has been achieved by the media team of the Public Relations Office:

Charity	Publication	Circulation	Links	Reach
	Harrow Times (Holocaust survivors freedoms)	39,973	http://www.harrowtimes.co.uk/news/11737153.Holocaust_survivor_given_London_freedom/?ref=mr	Harrow-wide
	Jewish Chronicle (Holocaust survivors freedoms)	21,664	http://www.thejc.com/news/uk-news/128522/holocaust-survivors-ben-helfgott-and-sabina-miller-given-freedom-city-london-hon	UK Jewish Community
RAF Museum	Warbirds News		http://www.warbirdsnews.com/aviation-museum-news/city-bridge-ridge-trust-aids-museum-program-engage-older-visitors.html	UK wide
RAF Museum	Air Scene		http://www.airscene.co.uk/news/aviation-news-uk/aviation-museum-news/city-bridge-trust-aids-museum-engage-older-visitors/	UK wide
RAF Museum	Mature Times	200,000	http://www.maturetimes.co.uk/city-bridge-trust-donated-87600-towards-program-engage-older-visitors/	UK over 50s
City Philanthropy	UK Fundraising		http://www.fundraising.co.uk/2015/02/03/adventure-philanthropy-network-inspired-50-launch-london/	Fundraising community
City Philanthropy	The Londonist	80,711	http://londonist.com/2015/02/things-to-do-in-london-monday-16-february-2015.php	London-wide

In addition, Champollion secured coverage of the Inspired 50 launch (see paragraph 22) in UK Fundraising and The Square Mile. You may also be interested to note that the Trust's Twitter followers have recently exceeded 2,000.

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