

Committee:	Date:	
The City Bridge Trust	18 th July 2012	
Subject:	Public	
The Lord Mayor's Appeal		
Report of:	For Decison	
Chief Grants Officer		
<p style="text-align: center;"><u>Summary</u></p> <p>This paper proposes a strategic initiative to help make the annual Lord Mayor's Appeal more efficient, effective and productive, through the establishment of a permanent position; that of Development Director.</p> <p>Recommendation</p> <p>£195,000 over three years (3 x £65,000) towards the salary and running costs of the Development Director of the Lord Mayor's Appeal and office support costs. This will be reviewed annually and is subject to satisfactory monitoring and evaluation.</p>		

Main Report

1.0 Purpose

- 1.1 This report seeks your approval for a strategic initiative to help support a new charity known as the Lord Mayor's Appeal. This is distinct from the Lord Mayor's Appeal beneficiary charity or charities and its purpose is to help make the Mayoralty more effective and efficient in its charitable fundraising, by the establishment of a permanent position; that of Development Director.

2.0 Background

- 2.1 As Members are aware, each year the incoming Lord Mayor announces his/her charitable appeal. The charitable beneficiary(ies) by and large undertake much of the fund-raising for the Lord Mayor's Appeal. Funds come from a variety of sources, including big fundraising events such as dinners, Livery Companies, charitable trusts and from City and other donors. Amounts raised are variable, although these are not always disclosed.

- 2.2 However, every year, the Lord Mayor begins his/her appeal from a 'cold-start'. As there is no database or established back-office system for the Appeal, there is no fund-raising record of techniques which worked well or of fundraising appeals which worked less well. This means that good ideas are lost, wheels re-invented and the amounts which are raised by the Appeal, variable.
- 2.3 As well as the lack of continuity and little or no carry-over of expertise, there is an inevitable replication of 'start-up' costs each year.

3.0 The Lord Mayor's Appeal

- 3.1 The Lord Mayor's Appeal, a new charity, has been created at the instigation of a five-person Continuum, being the next-in-line, potential Lord Mayors. The Lord Mayor's Appeal is a company limited by guarantee and, is being registered with the Charity Commission.
- 3.2 The charity's objectives are specifically restricted to:
- (1) *providing resources to further the particular charities, not for profit organisations and charitable purposes chosen by the Lord Mayor;*
 - (2) *publicising and promoting charities or charitable purposes chosen under (1);*
 - (3) *the relief of sickness and the preservation of health of people, whether residing in the United Kingdom or elsewhere;*
 - (4) *the conservation, protection and improvement of the physical and natural environment, for the benefit of the public;*
 - (5) *the advancement in life of young people, through education and other means;*
 - (6) *the prevention or relief of poverty by providing grants, items and services to individuals in need and charities, or other organisations working to prevent or relieve poverty; and*
 - (7) *the promotion of community welfare.*

4.0 Development Director

- 4.1 The Development Director will work directly with successive Lord Mayors and their chosen charities to provide strategic advice on their Appeals and the lessons learned from previous years. An important dimension of the post will be to establish the new charity as an institution that enhances both the Mayoralty and the City as a whole. The Director would play an important part in promoting and encouraging philanthropy in the City and wherever the Lord Mayor travels, the goal being to enhance the perception and reality of the City as a global centre of philanthropy as well as business.
- 4.2 A key objective of the post is to help communicate the successes of the Appeal and the benefit it has brought to good causes and disadvantaged communities. In short to “develop the brand” and to aspire to the highest standards of transparency, giving professional advice to ensure that the documentation, record keeping, reporting and governance are of the highest standard.
- 4.3 Fundraising is increasingly competitive and the Development Director would ensure that a new database, using the latest integrated software would be essential in the modernisation of the Appeal. Tools will include Facebook and Twitter relationships and links to other websites. The basic architecture of the website would be the same year-in, year-out, even if the appearance and title of the Appeal changes from year to year. Digital giving is likely to open up the Appeal to a much younger audience.

5.0 Governance

- 5.1 The Board of Trustees will comprise those Aldermen who have been endorsed by the Court of Aldermen to serve as Sheriffs and to progress to the Mayoralty. The Articles allow for non-Aldermanic representation on the Board. The Chairmanship of the Board will be the next in line to be Lord Mayor (SABTAC), working closely with the Lord Mayor.
- 5.2 The Development Director would report to both the Lord Mayor and Chairman and the Board.
- 5.3 Office accommodation near to Mansion House and Guildhall will be provided.
- 5.4 The Chamberlain has agreed that the City of London Corporation will “host” the provision of payroll services.

6.0 Setup and Running Costs

6.1 Total estimated annual update costs are set out below:

Estimated Cost	Amount
Accommodation	£5,000
Development Director – salary	£50,000
Development Director – pension, social security, payroll “hosting” services	£10,000
Website development	£20,000
Equipment – computer hardware, mobile phone, printer	£5,000
Database software – initial cost and licence fee, setup and training costs	£15,000
Operating budget – travel, stationery, communications	£25,000
Professional services	£2,500
TOTAL	£132,500

6.2 You are being asked to support approximately 50% of these costs; £65,000; £65,000; £65,000, making a total of £195,000 over 3 years. Once the infrastructure is established, the costs will be borne by each Appeal. Three years pump-priming support will enable this to happen.

7.0 Conclusion

7.1 The Lord Mayor’s Appeal is an opportunity to both maximise the efficiency of individual appeals and in so doing raise more money for charities and good causes in a consistent manner.

7.2 The Charity will also promote the charitable activities of the Mayoralty and the City as a whole, at a time when it is vital to communicate to a wide audience, the range and scale of philanthropy in the Square Mile. The new charity will complement and add value to your existing strategic initiatives; “City Philanthropy – A Wealth of Opportunity” (the new website promoting philanthropy in the City) and the equally new “The City Funding Network”. It will be a positive manifestation of “joined-up” City activities which are in step with CoL’s communications strategy, *supporting London’s communities*.

8.0 Recommendation

- 8.1 £195,000 over three years (3 x £65,000) towards the salary and running costs of the Development Director of the Lord Mayor's Appeal and office support costs. This will be reviewed annually and is subject to satisfactory monitoring and evaluation.

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