

<b>Committee:</b> The City Bridge Trust Committee	<b>Dated:</b> 24 <sup>th</sup> November 2016
<b>Subject:</b> Philanthropy/Giving Update	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For decision</b>

### **Summary**

The City has a long history of giving time, money and benefits in kind for charitable purposes. The political and economic context (the retrenchment of the state; less central government money; the consequential 25-40% cuts to London Borough budgets and impact on the community and voluntary sector – less resource/increased demand for services; and challenges to community cohesion) means that the ‘giving agenda’ is perhaps more important than ever. Many stakeholders are engaged in this area of work and wish to encourage more giving: from Central to Local Government; City Hall to business; charitable organisations to individual citizens. City Bridge Trust (CBT) and its trustee the City of London Corporation, Mansion House and related charities and networks are all playing a role. There is more to do.

‘Encouraging philanthropy- intelligent and intentional giving’ is part of CBT’s mission. The trust has invested in this area over the past 5 years and an external review of the investments was commissioned. Rocket Science delivered the review, made recommendations and these were reported to this committee. This report provides a progress update; recommends decisions on some of the review recommendations; sets out an action plan, including timeline, for the implementation of these recommendations and outlines the resources required.

### **Recommendations**

It is recommended that Members:

- a) Note the update provided by this report.
- b) Agree that a Giving Strategy should be developed with the vision of ‘Encouraging more giving of money, time, skills and other benefits in kind – effectively done for the benefit of thriving communities’. The aim would be that this is a jointly agreed strategy with the City of London Corporation and that it aligns with the strategies of other key stakeholders.
- c) Agree the overall action plan, including timeline, shown in Appendix 1.
- d) Agree, in principle, additional interim resource to support the delivery of the action plan, such resource to be costed and a decision on the CBT contribution to be delegated to the Chairman and Deputy Chairman in discussion with your Chief Grants Officer.

## Main Report

### Background

1. London and the City have a long-standing tradition of giving money, time, skills and benefits in kind for charitable purposes. This tradition of giving was celebrated in the exhibition CBT funded: Philanthropy: The City Story, curated by the Museum of London, led by City Philanthropy a Wealth of Opportunity, contributed to by the Liveries and exhibited at Charterhouse – the 14<sup>th</sup> century former monastery and now alms house.
2. Giving is as important, if not perhaps more important in the UK than it has been at any time in the post WWII period: arguably, the post WWII welfare settlement and the relationship between the UK state and its people is being renegotiated. The funding from central government is re-trenching and there have been consequential cuts to London Borough budgets of between 25 - 40%. This coincides with, in some areas, increased demands on the services of some charitable organisations as statutory services reduce. There is also some evidence of increased pressures on community cohesion, post the referendum on Europe.
3. In response to this context, there is considerable appetite to do more on the giving agenda from many different stakeholders: from Central to Local government; City Hall to business; charitable organisations to individual citizens.
4. Businesses have increased and broadened their 'responsible business' activity and one key component of this is giving: the giving of time and skills through volunteering, benefits in kind, and/money, either through encouraging employees to give through payroll/giving circles, sponsoring specific charities aligned with business strategy, or work through corporate foundations. Businesses are recognising the strengthening business case for this agenda: more millennial job applicants and clients are apparently questioning businesses as to how responsible they are and their answers impact on the choices of which job to take or where to invest one's wealth.
5. CBT, the City of London Corporation, Mansion House and related charities already do a considerable amount in respect of the giving agenda. CBT is London's largest independent grant-giver, the Corporation, both through its Central Grants Programme and beyond, distributes further money, there are benefits in kind to the value of c.£1M and c. 3500 employees are part of a Corporation-wide volunteering programme whereby each employee can volunteer for 2 days/year during work time.
6. 'Encouraging philanthropy - intelligent and intentional giving' is part of CBT's mission. The trust has invested in this area over the past 5 years and an external review of the investments was commissioned. Rocket Science delivered the review, made recommendations and these were reported to this committee in May 2016. By way of reminder, briefly these were:

## Progress Update

7. Since May 2016, the following progress has been made:
  - a) Your grantee, Centre for London has completed the scoping work you funded to consider a pan-London research project on giving. Its conclusion is that a substantive piece of work would be very helpful in both bringing people together to combine effort and to arrive at a better understanding of who is giving what in London, how effectively it is being given and how giving can be increased and improved.
  - b) A substantive proposal is being worked up by Centre for London and (depending on the size of the application) this will be considered in the coming 4 weeks under delegation to your Chief Grants Officer in consultation with your Chairman and Deputy Chairman or brought to your January Committee. The work is supported by other key stakeholders.
  - c) Your Chief Grants Officer has been working with officers in City Hall. There is clearly common cause on the giving agenda and an appetite to work together, with other key stakeholders. The giving agenda mutually reinforces your work to strengthen Civil Society in London: giving can clearly contribute to the resource needs of charitable organisations and can strengthen community ties. The new Deputy Mayor for Social Integration, Social Mobility and Community Engagement, Matthew Ryder QC, has been appointed and is already engaging with both agendas.
  - d) Your officers have been working closely with the City of London Corporation's Economic Development Office (EDO). The focus has been to explore closer alignment of CBT and EDO's work in respect of: the giving aspect of responsible business; the brokerage function of connecting business to charities; and the Corporation's internal employee volunteering scheme and the charities CBT supports.
  - e) CBT has been commended for the transparency of its grant making – all decisions and grants are in the public domain. Following the City of London Corporation's grants review, progress has been made in capturing the grant-giving across the Corporation and related charities. This exercise is continuing and being extended to the giving of benefits in kind. Ultimately a clear picture of the totality of the giving through grants, benefits in kind and volunteering will be possible. This exercise is still on-going. It will helpfully inform a stronger giving communications narrative.
  - f) The CBT-funded project London's Giving, identified as strong and growing brand by Rocket Science, and supporting the development of local giving initiatives across London has been developing a 5 year strategic application to anchor the developing work. This builds on the Islington Giving work. It will be presented as a funding application to this committee early in the New Year. A London's Giving master-class was hosted by CGT in the Basinghall Suite – your Deputy Chairman kindly introduced the event.

- g) It was decided that the CBT-funded project City Philanthropy a Wealth of Opportunity would be brought in-house to CBT and its work more deeply integrated to that of the trust. IT issues precluded this happening before calendar year-end, but this is now scheduled to be completed by financial year-end. Transition arrangements are being agreed with the project director.

## Action Plan

8. A draft action plan based on the Rocket Science recommendations and subsequent work is appended to this report. Two anchor dates are the first quarter of 2018 for convening a broad constituency on the giving Agenda and July 2017 when the CBT 5 Year Strategy should be agreed and as part of this strategy the Giving Strategy can also be settled. There are many actions that could be taken before and between these dates. These are set out in the appendix and contingent on resources (see below)

## Resources

9. The period between now and July 2017 is an important transition phase. On a strategic level, your 5 year review is being undertaken and your new strategy, including your approach to the giving work, will be agreed by that date. This period of review helpfully coincides with others key stakeholder reviews such as EDO and City Hall. There is an opportunity to helpfully align.
10. The Rocket Science review suggested a Head of Giving Post to oversee the giving work and increase co-ordination and potential impact. Until such time as the strategy is settled it would seem premature to agree permanent resource. However, this transition phase will require considerable time and thought. Given the review and the potential arising from the recommendations, it would be a shame to lose momentum. It is therefore proposed that an Interim Head of Giving role is funded on a short-term contract/consultancy basis – reporting to your Chief Grants Officer. It is proposed that this role should:
- Support the Chief Grants Officer in drafting a Giving Strategy to be agreed by CBT and the City of London Corporation
  - Finalise the draft action plan appended to this report and project manage the delivery of the plan through to July 2017
  - Be responsible for assessing any potential grants in this area and manage any grants made
  - Prepare a draft evaluation specification which reads across all grants in this area and also the giving agenda across CBT and the City of London Corporation
  - Liaise with and support key partners and stakeholders to make the most of the potential for alignment.
11. Working alongside this role and to ensure an effective transition from an outsourced project to one integrated within CBT, it is also proposed that the current Director of City Philanthropy a Wealth of Opportunity is retained on an

agreed number of consultancy days from the end of current funding, 31 March 2017 through until the end of 2017 to support the transition.

## **Conclusion**

12. The importance of increasing the amount of effective giving to support thriving communities is perhaps more important now than it has been for many years. It is an agenda where key stakeholders can find common cause and work collaboratively to make a difference. Developing a shared giving strategy, agreed by CBT and The City of London Corporation (anchored in the CBT 5 year Strategic Review) and aligning with other key stakeholders will go a long way to making the most of our collective assets.
13. This strategy can direct how we model this agenda, encourage others, celebrate success and improve by learning from our shortcomings. The action plan demonstrates there are practical steps that can be taken now, in parallel to the strategy being developed, and agreeing dedicated resources will ensure that progress is made.

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**D R A F T**  
**CBT/Corporation Giving Action Plan**

<b>Area of work:</b>	<b>Action:</b>	<b>Date:</b>	<b>Lead:</b>
Strategy	Develop joint Giving Strategy for CBT and the Corporation and related charities	Jul 17	DF/interim
	Assess Centre For London's research proposals to inform multi-stakeholder, pan-London Giving Strategy	Dec 16	DF/OD
Improving capture of the CBT and Corporation & related charities' giving activity	Quantification of Charitable Funding across CBT, the Corporation and related charities - information to be extrapolated from different data sources using the grants review as the foundation	Jan 17	DF/KA
	Benefits in kind review – remaining departments to complete questionnaire. Data to be aggregated and analysed	Jan 17	DF/JJ
Improving communications	CBT officers working with the City of London Corporation's Communications Department to further develop a common giving narrative	Dec 16/on-going	BR/DF/MH /JP/KD
Improving co-ordination/learning	Achieve transfer and integration of City Philanthropy a Wealth of Opportunity into CBT	Mar 17	DF/interim/CC
	Work with EDO and their consultants to consider greater alignment of: <ul style="list-style-type: none"> <li>• the Corporation's volunteering offer and CBT and Central Grants Programme grantees</li> <li>• projects supporting the brokerage of business skills to the needs of charitable organisations</li> </ul>	Nov 16– Jan 17	DF/interim/DN/NB
	Consider relationships with other key stakeholders and how best to align/link to their work	Apr 17	DF/Interim
	Draft common evaluation specification for giving projects (linking to research baseline)	May 17	DF/Interim
	Scope Giving Conference	Feb 17	DF/interim
	Giving Conference (TBC)	Feb 18	DF/interim/events resource

Resources	Prepare business case for interim Head of Giving resource and seek agreement	Nov - Dec 16	DF
	Agree transition arrangements with Director of City Philanthropy	Nov- Dec 16	DF/CC
	Receive and assess London's Giving's strategic grant proposal	Jan 17	DF/interim