Place-Based Giving Schemes
Funding, engaging and creating stronger communities

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1. Executive Summary

As part of its work to encourage charitable giving and philanthropy, The Office for Civil Society, Department for Digital, Culture, Media and Sport commissioned research into place-based giving and funding schemes in England. The research is intended to help paint a clearer picture of the broad range of place-based giving schemes in England, as well as serve as a means of sharing learning between organisations and with those looking to establish similar schemes.

The phrase 'place-based giving scheme' has been employed in this report to describe a multitude of schemes operating in defined geographical areas. The terminology and definitional differentiation within this space is quite nuanced and still developing, since there are multiple forms which are very much shaped by local circumstances and different approaches. This report has opted to include a variety of schemes that involve bringing together resources to benefit the community in a collaborative way in a defined geographic location with the intention of tackling local issues in a new way. Beyond that, approaches range from those resembling asset-based community development, those doing 'systems change', and localised grant-making, to giving schemes intended to corral local donations.

The research uncovered a large and growing number of place-based giving schemes across England, and highlights the success of place-based giving schemes as part of the landscape of charitable giving in the UK. In addition, the thirteen case studies reveal a huge amount of collaborative working going on between funders and other organisations which span across the private, public and third sectors, including local councils, local and metro mayors, independent grant-making foundations, businesses and local residents.

Place-based giving schemes in England currently include 21 London Borough Place-based Giving Schemes; 43 Community Foundations; 69 giving circles; plus a plethora of other forms.

It is clear that there is a high degree of disparity in terms of the level of development of local philanthropy ecosystems; and where there are existing place-based giving schemes within these ecosystems; they differ greatly in approach, scale and maturity.

1.1. Developing and growing a place-based scheme – needs and challenges

A wide range of interviewees were asked about the challenges faced in setting up and growing a place-based giving scheme, as well as being asked about suggestions for potential solutions to overcoming these challenges.

Across the spectrum of different place-based schemes analysed in this report the most frequently-mentioned factors were practical considerations first and foremost, with funding taking centre stage:

- Seed funding
- Ongoing core cost funding
- A dedicated development worker
- A degree of local affluence alongside deprivation

Following on from these, further challenges were felt to be the following:

- Inertia
- Capacity issues / resource scarcity
- Building a reputation and track record
    - Evaluating impact
- Marketing and Communications
- Building partnerships
    - Making and maintaining relationships with corporates
    - Problems with partnerships
    - Avoiding unhelpful competition
- Engaging with the local community
- Defining 'place'
    - Jurisdiction issues

In order to mitigate these challenges, many schemes suggested the following solutions for developing place-based giving schemes:

- Research the likely take up of giving and be clear about your fundraising priorities
- Invest in design and relationship-building
- Carry out a needs analysis first
- Develop a strong brand

Suggestions are offered around forming successful partnerships, including persistence, understanding, developing impact evidence, and when to compromise (and when not to).

1.2. Civic Philanthropy – Mayoral involvement in place-based initiatives

There is currently renewed interest in how the historically-philanthropic role of Mayor can be revived and revitalised to encourage greater giving in the landscape of 21st century Britain. In the context of this report it is of most interest how mayors work collaboratively with other funders and the existing and emerging place-based philanthropic structures, and what potential there is for future collaborations. The current research finds that while there is currently some partnership working and some collaboration between place-based funders and schemes, perhaps most notably with Community Foundations, there is considerable scope for more, and a role for greater collaboration with place-based schemes in many mayoral functions.

1.3. The future of place-based giving schemes

One of the aims of this research was to investigate whether more place-based giving is possible and desirable in England. Among interviewees, there was a strong desire to see more place-based giving being developed, as long as that development is done sensitively and place-based schemes aren't seen as a 'magic bullet' with which to solve all the country's ills. The vast majority felt very strongly, however, that there isn't and shouldn't be a single model for place-based giving because by its very definition it needs to be tailored to the particular place it is based in. This means that each scheme has slightly different needs.

Finally, the research suggests that there is far greater potential to harness people's sense of identity and community to drive far more locally-focussed charitable giving around the country. As many have commented, the recent referendum on 'Brexit' has shown that place matters very much to people in Britain, and the schemes outlined in this report have shown how a sense of place can be utilised to the greater good. While place-based charitable initiatives are not a new concept, a renaissance of thinking around place-based giving clearly has potential benefits for all[1].

[1] There is much interesting analysis currently being undertaken in this space (particularly around London's Place-Based Giving Scheme 'movement') and this report does not intend to reinvent the wheel. The bibliography contains further reading on this topic.

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2. What are place-based giving schemes?

Place-based charitable working isn't a new concept. In fact, it's where charity's roots proverbially lie. In the modern world, however, we are now able to apply the fruits of globalisation (big data, big finance and global expertise) to our local places (Kruger, 2017). The phrase '*place-based giving scheme*' has been employed in this report to describe a multitude of schemes operating in defined geographical areas. However, the author acknowledges that this term is contested, and that many of the schemes described here would not use this label. The terminology and definitional differentiation within this space is quite nuanced and still developing.

This research and report took as a starting point London Funders' definition of Place-Based Giving Schemes (PBGSs)[2]:

> *a partnership of people and organisations with a range of local knowledge and skills who come together to develop an evidence-based giving programme. (London Funders, 2017)*

The research quickly uncovered that this definition was too restrictive to allow for the multitude of place-based schemes currently in operation, and therefore a more flexible definition was employed in acknowledgement that there are multiple forms that are very much shaped by local circumstances and different approaches. This report has opted to include a variety of schemes that **involve bringing together resources to benefit the community in a collaborative way in a defined geographic location with the intention of tackling local issues in a new way**. Beyond that, approaches range from those resembling asset-based community development, to those doing 'systems change', to localised grant-making and giving schemes intended to corral local donations[3]. Each case study includes a measure of how similar or different the approach is to that defined by London Funders as a place-based giving scheme.

3. Background – Context

A large part of the current context to life in Britain is mired in the after-effects of the global recession of 2007/8-2010/11. Much has been written about the dual pinch of increased needs in communities across Britain, driven by the economic downturn, coupled with the cuts to government spending as part of their austerity measures. The effects of these two drivers is still very much being felt. Estimates by Collaborate and the Local Government Association calculated a £14.4 billion supply-and-demand gap in public services emerging by 2020 (RSA, 2013).

> *Austerity was a driver for all of our case study examples – in terms of both responding to loss of local funding and trying to spend remaining money more effectively.* ***IVAR[4]***

In addition, the recession and austerity measures hit some places harder than others – particularly those with already higher levels of deprivation – which are also the places least likely to be benefitting from the current economic recovery. There are now 'hidden pockets of poverty' (French, 2017) and 'doughnuts of deprivation' (inner city areas) (Goff, 2016) all over Britain, as well as an increasing divide seen between the wealth of London and the South East, and the rest of the country.

> *Increasingly England is characterised by differences at the regional, local and neighbourhood level. The gap between the rich and the poor is growing and increasingly the economies of our towns and cities are characterised by stark and unsustainable differences in income and spending power. (Turok & al., 2007)*

Issues such as homelessness, poverty and poor mental health are rising in many 'left behind' places, with entrenched geographical health, educational and financial inequalities showing a stark North/South divide (Locality, 2018). Inequality in Britain is at a 40-year high (Dorling & al., 2007). The 'haves' and the 'have nots' have become more polarised and more extreme. Some commentators have concluded that traditional

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[2] Although London Funders also acknowledge that this is 'a misnomer which we all use', so it is likely that this label may change in future.

[3] IVAR's research identifies a spectrum of approaches from 'Responsive' (funding 'good things') to 'Strategic' (systems change), with 'Building community assets' sitting midway on the continuum (IVAR, 2016a).

[4] Refers to collaborative funding in place by grant-making trusts and foundation in the UK: (IVAR, 2017).

economics and local economic policy (which '*has not changed since the 80s*' (Goff, 2016)) is not working to find solutions to these issues.

Additionally, it has been noted that charitable donations by companies, spending by grant-making trusts and foundations, charity expenditure and social capital are all unevenly distributed such that areas of higher deprivation tend to have less of all of these (Butler, 2013) (Walker, 2013) (Traynor & Walker, 2015) (Mohan, 2012) (Lindsey, 2012) (Richards & Heath, 2015) (Pharoah, Chapman, & Choudhury, 2014).

3.1. A loss of community spirit

A loss of community spirit in 21st century Britain appears to be widespread. A report prepared for the Big Lottery Fund in April 2015 talked about a decline in community cohesion: '*with falls across the country in belonging, relationships and willingness to help the local area*' (Trajectory, 2015). Locality more recently found that 68% of the general public in the UK think that community spirit has declined over the last ten or twenty years (Locality, 2018).

The impact of increased migration, and the outcome of the Brexit vote has thrown a new light on English people's attachment to 'place' – not always in a positive or inclusive way. Recent polling by CAF found that fourteen million people (26%) feel that their community is more divided than it was at the start of the year, while only 12% of people feel that a sense of community spirit in their local area is more noticeable, compared to 33% who disagree (CAF, 2016).

> *The decline in community cohesion correlates with another trend we have observed over the course of the downturn – a shift in personal ethics and wider outlook – Generally, people are less global or altruistic in their perspective – They are more likely to support causes that are local or which directly affect them – … This narrowing in outlook may explain the rise in prejudice, the rise in anti-immigration sentiment, and at its most extreme, the direct impacts, such as hate crime. (Trajectory, 2015)*

Equally importantly, 71% of people feel that they currently have little or no control over the big decisions that affect their local community (Locality, 2018). Accompanying this is a stalling of charitable giving – whether of time or money. The latest UK Giving (CAF, 2018) report shows that fewer people are donating money or participating in volunteering or social action than last year; while Locality found that just 18% of people said that they are currently involved in their local community, and 67% say they find it difficult to get involved (Locality, 2018). A recent survey by CAF, however, found that 58% of the general public said that they would be likely to donate money to small charities in future, with 63% seeing a positive impact of small charities on their local community (CAF, 2018).

3.2. The policy context

The last couple of years have seen some major reviews into the role of 'civil society' in the UK; for example, the independent *Civil Society Futures* project chaired by Julia Unwin[5], the DCMS/OCS *Civil Society Strategy*[6], the *Commission on the Future of Localism*[7], and IPPR's *Future of Civil Society in the North* programme[8]. These underline the importance of a strong civil society in underpinning a strong economy and a strong Britain.

The policy of devolution is enabling places to have more say in local services, while new structures such as metro mayors of combined authorities introduce new possibilities for a more joined-up approach to tackling local issues. Some commentators have called for a new '*local social contract*' prompting a '*deeper collective identification with local place*' that could result in more social responsibility and local philanthropy (McInroy, 2017).

3.3. An enduring attachment to place

Despite the rhetoric around loss of community, people's attachment to their local area remains strong. In 2014 46% of the general public felt a strong attachment both to the area where they were born and to the areas

[5] http://civilsocietyfutures.org
[6] https://www.gov.uk/government/consultations/civil-society-strategy-have-your-say
[7] https://locality.org.uk/wp-content/uploads/2018/04/LOCALITY-LOCALISM-FULL-ONLINE-REPORT.pdf
[8] https://www.ippr.org/research/major-programmes/the-future-of-civil-society-north

where they currently lived (Trajectory, 2015). A more recent poll by Locality found that 41% of people think that community spirit is strong in the area in which they live (Locality, 2018). The same poll found that 30% of people would like to get more involved in their local communities (and 32% are unsure whether they would like to). Additionally, 57% would like local people to have the final say in local decisions (Locality, 2018).

This reveals that there is huge scope for more involvement. CAF has recently reported an awakening of a spirit of activism in Britain, finding that there is a slow but sure rise in engagement in local communities (CAF, 2016), with 30% of people now saying that they are more active in a political or social cause, and about nine million (18%) people saying that they feel more inclined to volunteer in order to help their local community (CAF, 2018). In fact, there is already a huge army of people working, unsung, in their communities. The Office for National Statistics (ONS) estimates the value of unpaid work in homes and communities to be equivalent to the formal economy.

3.4. A place-based approach

These positive attachments to place and increased activism augers well for place-based giving schemes which can help people to build better, more resilient and integrated communities which offer better choices and opportunities for all. Such a solution is a win-win virtuous circle, since research has shown that those most likely to feel a high sense of life satisfaction are those that feel they belong to their neighbourhood (University of Essex et al., 2011/12), and feeling part of a community can increase health and wellbeing, reducing feelings of isolation (PHE, 2015). Additionally, research shows that involvement in social action can increase community cohesion and generate a greater sense of civic pride and purpose (McKinnon & Green, 2018).

> *Taking part in local action can strengthen feelings of community cohesion, generate a greater sense of pride and purpose and improve wellbeing. (Locality, 2018)*
>
> *When we have place in common we can work to overcome other differences.* ***London's Giving***[9]

Place-based approaches aim to tap into this existing and potential social capital.

> *Increasingly, a consensus is growing that, in order to help build healthier and more productive local areas, organisations need to work much more collaboratively than they do today. This includes developing quality relationships to nurture collaborative working between actors from across public, private and voluntary sector. (IPPR North, 2017)*
>
> *Part of the purpose of place based approaches is to build the capacity of the community to take charge of its own future, to speak for itself, and to build social capital and connections within the community. (Anheier & Leat, 2007) (IVAR, 2016b)*

In the present circumstances there are 'no longer any single sector solutions' (Griffiths, 2017) – no sector, public, private or voluntary, has the answers on its own. A consensus is growing that collaborative working is the key to building happier, healthier and stronger communities – combining the insights, knowledge and key strengths of each sector.

Increasingly the lines between sectors, particularly when it comes to the question of responsibility for social action, are being blurred. The positive side to this is that it should make collaboration not just easier, but necessary. This ties in with the growing talk of 'movements' rather than organisations (Hunter, 2018).

> *There is a lot of importance placed on the merits of collaboration, on place and local context as determining factors and on the opportunities and risks afforded by new technologies, new business models and new institutions like the metro mayors. (Hunter, 2018)*

IVAR's research (IVAR, 2016) found six specific motivations for, and benefits of, working in place: to target a particular issue; to address cold spots; in response to changes in policy/external context; to test a model or approach; as a way of targeting areas of high deprivation; because a funder is by definition a 'place-based funder' with a specific geographical remit or focus. But over all of this, the reasons for place-based working seem pretty clear:

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[9] Thomas, C. '*To tackle the country's divisions, we must start locally*' In (NPC (Eds.), 2017).

We know that the most effective and sustainable change happens when there is broad participation in defining problems and creating solutions. (Behrens, 2017)

4. The current landscape of place-based giving schemes

The Venn diagram on p11 is intended to show the variety of place-based giving schemes currently in operation in England. It is not intended to be a comprehensive listing of such schemes, nor to provide a concrete typology. Indeed it may turn out to be a spurious categorisation since the lines between different forms of scheme may be very blurred. It is, however, an attempt to present some of the different ways in which place-based schemes are operating so that a general reader can differentiate between what the author sees as different approaches to place-based giving, and should form a starting point others can build on.

Place-based giving schemes are seen to sit beside and intersect with a wide range of other local initiatives for community development, neighbourhood improvement and regeneration, including for example *LocalGiving*, *Give Local*, *Big Local* and *Community Organisers; Asset-Based Community Development approaches*; *Power to Change* which is trying to create better places through community business; and *ACRE* which works in rural areas.

The place-based schemes covered in this report include the 'new model' Place-Based Giving Scheme (PBGSs) movement in London boroughs, other PBGSs following a similar model outside London, Community Foundations, independent trusts and foundations funding in place (where this funding forms part of a collaboration or resembles other PBGSs), Local Councils working in collaboration, place-based schemes with a single issue or beneficiary group, social prescribing (where this resembles PBGSs), giving circles and Mayors' Funds.

4.1. Place-based schemes in numbers

21 London Borough Place-based Giving Schemes (12 active and 9 in development) raised over £10 million in the last three years and distributed over £3.5 million[10]. Islington Giving alone has engaged over 4,000 volunteers in projects addressing social isolation and mental health since its launch in 2010 (London Funders, 2017).

43 Community Foundations in England distributed approx. £66.7 million in 2016/17, from an endowment of approximately £507 million. Collectively over the last decade, UK Community Foundations have given out over £1 billion to local charities, impacting 4.7 million people, and engaging over 15,000 people in giving to their local area (UKCF, 2017).

Hundreds of individual place-based schemes have been identified across England, including:

69 giving circles in England (Eikenberry & Breeze, 2015)

26 Healthy Cities projects in the UK (plus numerous other social prescribing schemes)

14 in-depth case studies illustrate different forms of place-based giving scheme

Civic philanthropy – Mayor's funds

8 Directly-elected (Metro) Mayors of larger areas[11]

16 Directly-elected Mayoralties administering a single local authority area

23 Lord Mayors

48 Lord Lieutenants in England[12] & 47 High Sheriffs in England

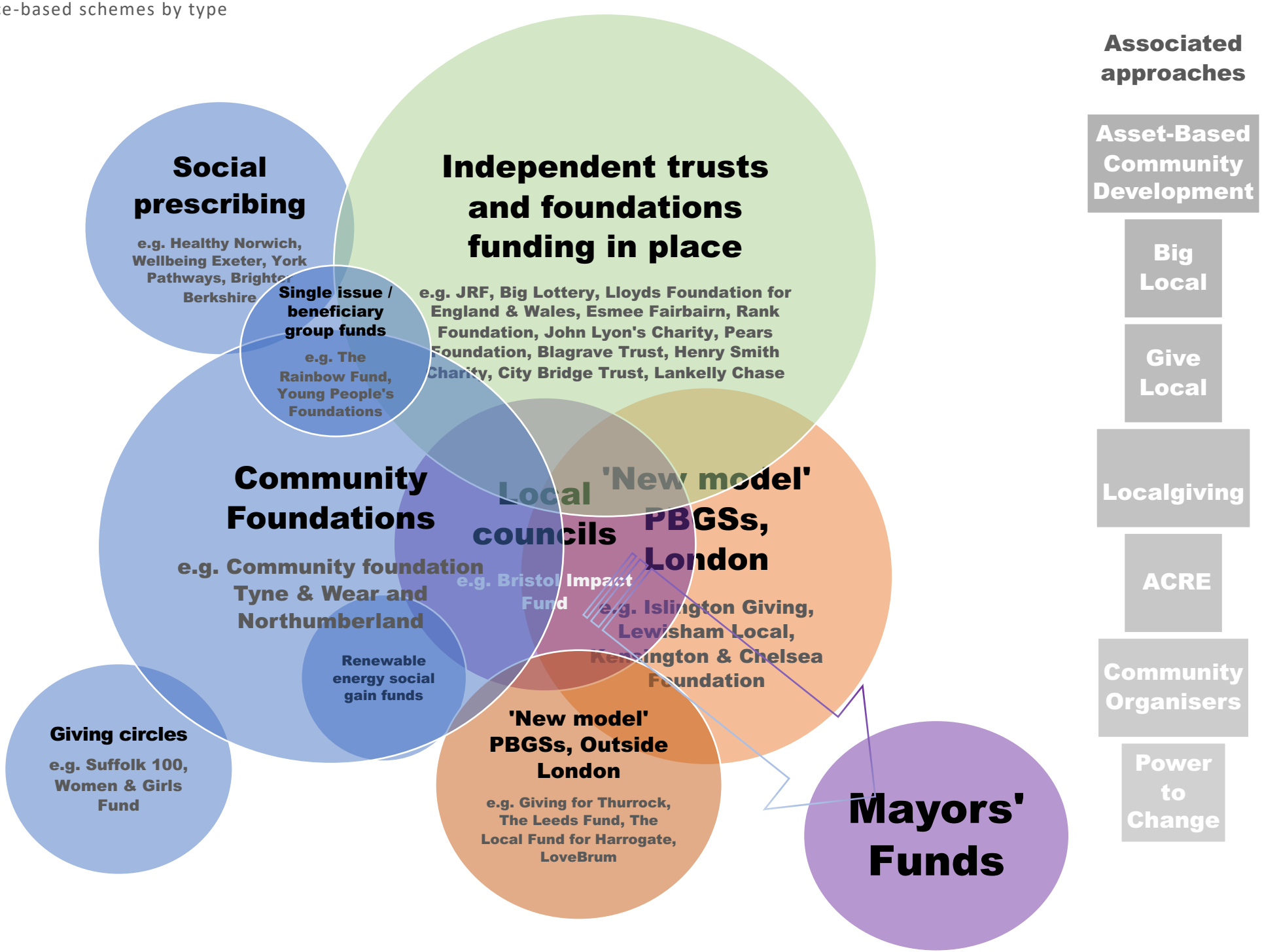
…many of whom hold funds which are part fundraised and granted out (many via Community Foundations).

[10] Totals refer to the five largest London Borough PBGSs in Islington, Hackney, Kensington & Chelsea, Kingston and Newham 2014-2016 (London Funders, 2017).

[11] Including Sheffield in 2018.

[12] Including the City of London which position, uniquely, is held in commission. The Lord Mayor of the City of London is the head of the Commission of Lieutenancy.

Figure 1: Place-based schemes by type



4.3. The London borough giving movement - Place-Based Giving Schemes

The starting point for this piece of research was the London borough Place-Based Giving Schemes (PBGSs). Described as '*a new model for the 21st century*' and a '*giving movement*', these have gained momentum over the last few years. A recent report (London Funders, 2017) outlined the characteristics that define London Place-Based Giving Schemes (PBGSs) as the following:

- A commitment to collaborative working across sectors where each partner has equal voice;
- An evidence-based needs-led approach;
- Independence from any statutory body;
- A new platform for 'giving' to the local community;
- Built on extensive local knowledge and encourages a stronger sense of community
- 'Giving' is more than giving money;
- Recognises and leverages the many positive assets already in the borough
- Transparency in decision-making and accountability to funders and the whole community;

Islington Giving was the first of the London borough PBGSs to be launched in 2010 as a partnership between the driving force, Cripplegate Foundation, and other local funders (see Case Study on p 13). Inspired by the success of Islington Giving, other London boroughs began to look at the possibility of starting their own campaigns, and in 2014 *London Funders*, the membership network for funders and investors in London's civil society, launched '*London's Giving*' – an initiative to encourage the development of PBGSs across London, funded by the City of London Corporation's charitable funder, *City Bridge Trust.*

Case Study: Islington Giving

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
London Borough PBGS	Islington borough, London	Founded and managed by Cripplegate Foundation the scheme is a partnership of 7 funders.	Raised nearly £6m, £3.4m distributed since 2010.	Yes.	'Invisible Islington' 2008 & 'Distant Neighbours: Poverty and inequality in Islington' 2013	Engaged over 4,000 volunteers in projects addressing social isolation and mental health.	By injecting over £1 million annually Islington Giving is able to fund projects which make a real difference to the local community.

Founded in 2010, Islington Giving is the first and archetypal London Borough Place-Based Giving Scheme. Since 2010 it has raised almost £6 million, supported over 60 voluntary organisations and charities, and engaged the support of almost 5,000 volunteers (Islington Giving, 2016). In 2016 and 2017 Islington Giving has made annual awards of over £1 million.

> *Invisible Islington exposed the borough's split personality. Showing that Islington is a place of "striking social extremes, where London's richest and poorest residents exist side by side, living entirely different lives."* ***Islington Giving website, Our Story So Far***

The original idea came from local Islington grant-maker Cripplegate Foundation which had been working in the borough since 1500. In 2008 Cripplegate Foundation commissioned a research project into inner city poverty which led to the report "Invisible Islington".

> *The research created a lot of interest and partly as a result of that, conversations which had started with other partners, around what we could do together which is more than we could do on our own, took a bit more form. An idea emerged to create an entity called 'Islington Giving' in coalition with five other independent funders. We thought: what if we all pooled some of our resources, our networks and our ideas, etc., and what if part of that was to raise more money to bring into Islington?* ***Helen Kersley, Programme Director at Cripplegate Foundation and Islington Giving***

Funded and administered by Cripplegate Foundation, Islington Giving is a partnership between the Breadsticks Foundation, City Bridge Trust, Cloudesley, the Morris Charitable Trust, the Macquarie Foundation and the Morris Charitable Trust. The original idea was to form a 3 year campaign, but following the success of this campaign which raised £3 million in 3 years, Islington Giving now plays a permanent role in supporting local residents[13]. Islington Giving is founded on 3 principles: A deep local knowledge; the recognition that everyone can make a difference; and the belief that impact is greatest when we work together.

> *We knew that giving grants was not enough. The stubborn issues of poverty and inequality cannot be tackled by one organisation or sector alone. We are an independent group of funders, businesses, residents and voluntary organisations working together to tackle poverty and inequality in Islington. We take practical action through grant making, networking and fundraising.* ***Kristina Glenn, Cripplegate Foundation Director and Islington Giving Director (London Funders, 2017)***

As well as a Board of funders, the scheme works in partnership with businesses ranging from Expedia to a local family restaurant and the Arsenal Foundation. The Macquarie Foundation largely funds the BIG Alliance (Businesses for Islington Giving) run by ELBA (the East London Business Alliance) which facilitates employee volunteering and business engagement to support Islington regeneration projects via Islington Giving. A Friends scheme raises money via annual donations from companies or individuals (starting at £1,000pa).

Parent House Outreach Project – In 2016 this project connected over 100 disadvantaged local families in Islington with their wider community, introducing them to local places, people and resources to improve their relationships, resilience and standard of living. Most parents experienced an increase in wellbeing, skills (including 'job ready' skills), confidence and sense of community. As a recipient of over £38,000 of Islington Giving funding in 2016, the Parent House has been able to reach more disadvantaged families than ever before.

The future:

In 2018 Islington Giving will fund its first projects in response to the findings of its 2017 consultation 'A life not a service', which found that many families want 'normal opportunities' such as going out, socialising and engaging in activities just as other families do, rather than formal services.

There are currently twelve active London borough Place-based Giving Schemes (PBGSs) in operation with a further nine at some stage of development. The active schemes are: Barnet Giving, Camden Giving, Hackney Giving (see case study on p 65), United in Hammersmith & Fulham, Islington Giving (see case study on p 13), The Kensington & Chelsea Foundation (see case study on p 15), Love Kingston, Lewisham Local (see case study on p 57), Newham Giving, Southwark Giving, Sutton Giving, and Tower Hamlets Giving.

> *The objective is to identify and harness new money, skills and resources for the borough, find better solutions to local problems and help create a stronger sense of community by raising awareness of local issues and bringing people together.* ***(London Funders, 2017)***

Between them, the London PBGSs have raised over £10 million and distributed over £3.5 million[14]. While there are many commonalities holding these schemes together as a network, each scheme is unique and tailored to their specific locale, since, for example, the London Borough of Hackney is very different from the Royal Borough of Kensington and Chelsea.

> *Place-based giving is about participation – getting the widest local engagement possible. It's about bringing together the richer givers and charitable trusts with businesses, statutory partners and the people on the ground to build a sense of community.* ***Clare Thomas, London's Giving, London Funders***

[13] See 'Giving Together: How Islington Giving is transforming local philanthropy' for a summary of the impact of the scheme's first three years'.

[14] If the Grenfell Tower Fund is included (Kensington & Chelsea Foundation) then these totals become around £17 million raised and £8.5 million distributed.

Case Study: The Kensington & Chelsea Foundation, London

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Foundation founded by local resident	The Royal Borough of Kensington and Chelsea.	No. The foundation is independent.	Yes. Over £5 million raised since 2008 (with an additional £7 million for the Grenfell Tower appeal.	Yes but only on a small scale and mainly employees of local businesses.	Research conducted with local charities by K&CF prior to Hands Across the Borough campaign, plus a Listening Project set up in November 2017 following the Grenfell Tower fire.	Yes.	Offers money, in-kind support and networking opportunities to local charities, and campaigns on local issues.

Our vision is of a Borough where no one is held back by lack of opportunity, where local people, schools and businesses work together to strengthen our community. ***(The Kensington & Chelsea Foundation, n.d.)***

The K&C Foundation was founded in 2008 by local resident and city businessman, Jeremy Raphaely (the current acting Chair). After living in the Borough for 40 years, Raphaely wanted to bridge the gap he saw between the amazing work of small local charities and the generosity of local residents – many of whom were unaware of the scale of local need in the Borough. The Foundation has raised over £5 million for over 150 local charities.

Kensington & Chelsea is London's smallest borough. It is also one of the richest, most densely populated and expensive boroughs to live in, but it also has pockets of severe deprivation.

In the borough that is home to Harrods and Harvey Nichols, visits to foodbanks rose by 25% in 2015 ***(London Funders, 2017).***

In 2016/17, the K&C Foundation raised over £509,000 and grant-funded 61 charities, plus nearly £33,000 in in-kind support (£128,000 in 2015/16), from a total of 529 donors - local people, businesses, schools and trusts (The Kensington & Chelsea Foundation, 2016/17). The Foundation placed 126 business volunteers with local charities in 2016/17, and involved 26 schools in projects and campaigns across the Borough in 2015/16 (The Kensington & Chelsea Foundation, 2015/16). The Foundation is increasingly involved in helping local businesses and schools to recycle items to local charities; and in arranging foodbank distributions at Christmas. In-kind support amounted to over £30,000 in 2016/17. The K&C Foundation has also benefited from being the local borough Mayor's charity of the year in 2016/17, which raised an additional £23,000.

Over half (52%) of the children in the Borough go to private schools and the Foundation has worked with private, state and independent schools to raise awareness of local issues, charities and campaigns, allowing the children to vote for which causes they wish to fundraise. In 2016/17, 13 local schools raised over £27,000 for local projects. The Foundation also arranges intergenerational events such as choir recitals for older people.

The K&C Foundation runs a number of single-issue campaigns to raise awareness of particular issues in the borough. Its three current campaigns are: Winter Warmth, Summer Sparks and Hands Across the Borough. Summer Sparks supports young people from more deprived backgrounds to reach their potential – over £32,500 was raised in 2016/17. Hands Across the Borough aims to combat isolation across the Borough – over £69,000 was donated in 2016/17 (The Kensington & Chelsea Foundation, 2016/17).

Winter Warmth campaign – Running each winter since 2011 this campaign tackles fuel poverty among elderly residents in partnership with Age UK Kensington & Chelsea, the Citizens' Advice Bureau and Nucleus Legal Advice Centre. The campaign encourages better-off older residents to donate their annual fuel allowance to those facing hardship and also raises awareness of the issue at the same time – over £40,000 was donated in 2016/17.

The Foundation's core costs are covered by separate donations from Patrons and Friends, trusts including City Bridge Trust, the Julia and Hans Rausing Trust and the Martin Charitable Trust. The K&C Foundation is also part of the London's Giving network.

In 2017 the K&C Foundation played a key role in fundraising efforts in the aftermath of the Grenfell Tower fire in North Kensington. The K&C Foundation worked with the London Emergencies Trust (which was established in 2015 but first took action after the terrorist attack on Westminster Bridge in March 2017), the Red Cross, the London Community Foundation and others, to coordinate the fundraising and grant-giving response. The K&C Foundation was particularly involved in grants for the bereaved and injured and initiated 'Fresh Start Grants' for survivors. The K&C Foundation's own Grenfell Tower Fund had raised over £6.85 million with more than £5.1 million distributed by August 2017 (Charity Commission for England and Wales, n.d.). A residual £1.8 million is yet to be distributed and has been earmarked for projects in the wider community for more long-term support and tackling underlying issues over the next 3 years, in conjunction with a listening project with the community to identify those needs.

> *The landscape has changed massively for us in the last 9 months. When the Grenfell Tower fire happened we went from being a smallish foundation with an income of £800,000 to having to collect and distribute £6.8 million. We usually process 12 online donations a month, but in the first month after Grenfell we processed 28,000. We're now considering what we should look like post-Grenfell, because we feel we can't carry on with business as usual. Our strategy is to become much more issues-based because the disaster has amplified many pre-existing issues as well as bringing new ones. Because our profile has been raised now is right time to be able to do greater good in the borough, and we'll address issues such as isolation and disadvantaged young people and unemployment.* ***Susan Dolton, Director, The K&C Foundation***

The future:

The K&C Foundation is building an endowment to support future work, managed by London Community Foundation, and endowed by Cadogan and Catalyst Housing Association among others. In the wake of the Grenfell Tower fire the K&C Foundation has committed to reviewing its strategy to ensure that their work responds to both pre-existing and emerging needs.

> *I see our role going forward as being the central hub in our community, bringing people together – be it businesses, charities, schools, whoever. That's how I see us increasingly. It will continue to be about raising funds and resources but also about making the whole picture fit together better – match-making between businesses and charities and local people.* ***Susan Dolton, Director, The K&C Foundation***

For London's PBGSs, as well as many others, the funding and support of grant-making trusts and foundations has been vital. The City of London Corporation's charitable funder, City Bridge Trust, has provided funding for a majority of schemes in the capital, as well as funding *London's Giving.* Funding is often given in partnership with other funders. See *A Place to Give* (London Funders, 2017) for more details.

4.4. Place-based giving schemes outside London

Outside London, place-based schemes have developed largely in isolation, having little or no knowledge of the London Borough schemes (with the exception of *Giving for Thurrock* which consciously tried to emulate the London model).

Case Study: Giving for Thurrock

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
A 'London-style' Place-Based Giving Scheme	Thurrock borough - a unitary authority in Essex.	GiFT is run by Thurrock CVS in partnership with Essex Community Foundation, the local council, Community Chest, Fairness Commission and Lakeside shopping centre.	Yes.	Yes, in conjunction with Timebank Thurrock anyone can volunteer. Corporate volunteering is facilitated via a social value framework with the council.	GiFT relies on Thurrock CVS (consultations with local residents) and available local needs assessments.	Anyone can donate or volunteer. Project Board meets regularly.	Aiming to bolster the local VCS and thereby the community by corralling giving of time and money by local people.

> *GiFT is a simple idea that has two key values. Firstly, funding sourced and raised in Thurrock should stay in Thurrock for Thurrock people, and secondly we should all work together to try and make a real change to local people's lives and the outcomes for them. No one organisation, charity, business or Council can ever achieve the ambitions of this project alone.* ***Giving for Thurrock promotional brochure***

Founded in 2016 GiFT was perhaps the first Place-Based Giving Schemes to try setting up a London Borough-style PBGS outside London. Its inception followed conversations between Thurrock CVS and Islington Giving scheme. The new Chief Executive Officer was very supportive of these schemes, having come from the tri-borough of Kensington, Chelsea and Hammersmith. Thurrock has a lot of industry and large businesses and GiFT is designed to coordinate the ask and the offering to these to try to attract donations to the local area rather than donations going to national charities.

> *We were seeing the cuts in voluntary sector funding come through and we wanted to see if we could create something which would join up the giving of money and other resources to support the voluntary sector and community groups.* ***Kristina Jackson, CEO Thurrock CVS***

A dedicated one-year post was created to develop the scheme and funding came from the CVS, local council and Thurrock Public Health. After that point the running of the scheme was taken on by Thurrock CVS with the help of a Project Board / Steering Group of the partner organisations.

> *We got a little bit of funding to get a worker for a year -only about £30,000. But we quickly recognised that it wasn't enough money or time to establish and embed something like this. You probably need three or four years to do that properly. We would like to get to a position with a funded post but it's difficult to get that kind of funding. There's no one in Thurrock who could easily fund this.* ***Kristina Jackson, CEO Thurrock CVS***

To date, a brand has been created, a giving page and payroll giving scheme set up, and a volunteering scheme runs in conjunction with Timebank Thurrock. The scheme aims to attract both high volume low value donations from residents (including a 'give-as-you-live' shopping donation scheme) and higher value corporate donations. So far, around £18,000 has been raised and a grant-making programme is under development. GiFT is concentrating on three priority areas decided after a mapping exercise by the development worker of all local strategies addressing residents' needs. The current priorities are: Opportunities for looked after children; Reducing isolation in the elderly; and Supporting young carers.

GiFT is trialling the "Thurrock Pound", based on the success of the "Brixton Pound", and currently uses the pounds to vote at events with the idea of eventually developing a real local currency. The pound is also meant to inspire all Thurrock residents to give just £1 to make a big difference. On the volunteering side Thurrock CVS has been working with the local council for three or four years to develop a social value framework, including a measure for volunteering and corporate volunteering through GiFT. So when companies are awarded contracts by the council there is now a mechanism for them to give back to the community by volunteering through GiFT. GiFT will become the local Mayor's charity.

The future:

The vision for the next 12 months is to establish more and better links with businesses and use that as a foundation to create the investment for the post to develop the scheme to the next stage. Going forward, the ambition of the steering group is to identify more local priorities and meet more local need, not just by grant-funding but by using expertise as well. In addition Thurrock CVS, in partnership with Stronger Together Thurrock, has been successful in the first round of the Place Based Social Action programme run by the Big Lottery Fund and the Department of Digital, Culture, Media and Sport (DCMS) and will receive a small amount of development funding to design a local social action plan which will include Giving for Thurrock. In 2019 they will find out if they have been chosen as one of up to 10 partnerships to receive up to £240,000 over three years to put their plans into action.

THE LOCAL FUND for The Harrogate District is a new scheme led by Two Ridings Community Foundation but is a partnership with the local council and CVS, and is a good example of the Community Foundation model being adapted in innovative and collaborative ways.

Case Study: THE LOCAL FUND for the Harrogate District, North Yorkshire

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Place-based giving scheme similar to the London model	Local authority area of Harrogate Borough Council, North Yorkshire.	A three-way partnership between Harrogate Borough Council, Harrogate & Ripon Centres for Voluntary Services (HARCVS) and Two Ridings Community Foundation.	Yes. The Fund currently comprises a couple of dormant trust funds but hopes to add new money to this	Yes. Via the Friends of THE LOCAL FUND hosted by HARCVS.	Yes. Vital Signs report for the Harrogate District (2017).	Anyone can donate. TRCF are responsible for distribution via an independent panel of people from the Harrogate District which will review applications. Also options to be involved as project assessors.	Aiming to fund smaller groups & organisations with limited resources for fundraising and marketing and who struggle to form partnerships with local businesses or apply for large grants.

Launched on 30th January 2018 by the Lord Lieutenant of North Yorkshire, and opening for applications on 1st April 2018, THE LOCAL FUND for the Harrogate District aims to build a significant endowment fund of £2m by December 2019 to provide a long-term legacy of charitable grant-giving, aiming to distribute £100,000 per annum by 2020.

The Fund aims to focus on smaller community groups and organisations which have limited resources for marketing and fundraising and do not always have the capacity to develop partnerships with local businesses or to continually apply for funds from grant-making bodies; and causes which are often ineligible for larger national grants.

Despite the relative affluence of the Harrogate District, Two Riding's Vital Signs Report (2017) highlighted some significant issues relating to poverty, social isolation and poor mental or physical health for vulnerable, elderly and/ or disabled people, particularly prevalent in the District's rural communities.

> *The Fund is being established in response to ongoing pressure on public sector budgets which are likely to reduce access to local authority grants in future and also in response to existing schemes being over-subscribed. The Fund also aims to develop philanthropic giving in the Harrogate District.* ***THE LOCAL FUND for the Harrogate District leaflet***

The Fund is managed as a three-way partnership between Harrogate Borough Council, Harrogate & Ripon Centres for Voluntary Services and Two Ridings Community Foundation. Each organisation plays to their strengths: the Community Foundation manages the fund and the grant-making process, while the CVS manages the Friends networking scheme and volunteering, and the Council gave pump-prime funding towards developing the Fund and helps to open doors.

> *Because we were working in partnership with the local CVS they helped us think about the aims of the Fund. They were really clear that this shouldn't be about fundraising, because that could be seen as conflicting with existing charities in the area. What we wanted to do was to grow the pot of money in the Harrogate District for giving. We've been fortunate in that we were able to receive a couple of dormant trust funds - one that was supported by Harrogate Borough Council and one family fund - as a kickstart to the Fund.* ***Jan Garrill, CEO Two Ridings Community Foundation***

Harrogate Borough Council are launching a District Lottery with some proceeds going to the Fund.

> *Harrogate Borough Council have been fantastic. They've contributed their annual Small Grants Fund for the local voluntary sector for 2018/19 into the pot (around £30,000) and they're allowing us to use our knowledge and the Vital Signs report to set priorities for funding. They also pump-prime funded the development of THE LOCAL FUND because they could see the importance of continued funding of local voluntary sector projects.* ***Jan Garrill, CEO Two Ridings Community Foundation***

The Fund will have an option for donors who wish to set up a named fund (in line with usual Community Foundation practice) under the banner of THE LOCAL FUND. These individual funds can be personalised to the donors' particular areas of interests, or specific geographical area within the Harrogate District. The donor

benefits from efficiencies since their fund will be managed within the umbrella of THE LOCAL FUND, and THE LOCAL FUND benefits from having a wider set of criteria to award grants from.

> Young Carers Boxing Club – funded by Harrogate Borough Council, the young carers boxing club is a weekly session for young people who may feel isolated, depressed and stressed because of their situation at home. The group allows them to meet other young carers in a fun environment which also boosts their physical and mental wellbeing.

'*The Friends of THE LOCAL FUND*' has been created to help develop a network of members who can promote and support the Fund. The aim is to get a mixture of high net worth individuals, businesses, charities and professional advisors involved, who are asked to act as ambassadors for the Fund at events and meetings to garner support. Friends are also encouraged to think about volunteering, and raising awareness of local issues. There is no mandated donation for Friends although they can donate if they wish, and/or set up their own fund with THE LOCAL FUND.

The most exciting thing is saying: 'THE LOCAL FUND means we can collectively get behind local issues, be informed by the sector, be informed by the evidence, and think about what we can do about it together – the private, public and third sector?' It's already prompted some useful conversations and debate in the local press around local issues. However, we want to do more of that, and then find ways that we can all work together to address those issues. ***Jan Garrill, CEO Two Ridings Community Foundation***

The future:

Two Ridings Community Foundation has plans to develop this model across their area of North & East Yorkshire.

Another example of Community Foundation innovation is The Leeds Fund, which is, in many ways, similar to other Community Foundation's 'ordinary' local funds, except in that it has been promoted and marketed in a much more prominent way, as a local giving scheme aiming to make more sustainable and targeted grants.

Case Study: The Leeds Fund, West Yorkshire

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Community Foundation local fund aiming higher.	City of Leeds, West Yorkshire.	No. Led and administered by Leeds Community Foundation.	Yes and no. Partly funded by Leeds Community Foundation endowment.	No.	Yes. '*Need in Leeds*' is produced every two years. Trustees select priority themes. The Fund is in talks with academic partners to develop a wider study to guide decision making.	Anyone can donate. The Fund is overseen by Leeds Community Foundation Trustees with independent representatives on the grants panel and key corporate donors	Providing up to 2-years' funding for projects addressing vital needs in Leeds.

Our ambitions in setting up The Leeds Fund were twofold:-Firstly, to provide us with a vehicle to reward good applications and good work we want to see happen because it is important for the city but weren't able to fund previously as we didn't have a strategic fund for Leeds, which was frustrating for the grants team! Secondly, we wanted the Fund to provide a clearer shop window on our work to our local place. That's something that other Community Foundations grapple with - invisibility. We wanted something that transcended the 'Community Foundation' label (which confuses people on both counts). We wanted to provide something that does exactly what it says on the tin. ***Kate Hainsworth, CEO, Leeds Community Foundation***

Launched in 2016 as a new initiative for Leeds, this fund accepts contributions from individuals and companies wanting to support the city in which they live and/or work. The Fund aims to become '*synonymous with local giving*' and was prominently launched with support from John Lewis Leeds and the Yorkshire Evening Post, and patron Gabby Logan. The Fund has run targeted appeals in the Yorkshire Evening Post for high volume low value gifts, and also has some regular givers.

Over £943,000 has been granted in the first three annual grant rounds to over 60 local community groups, benefitting over 8,400 local people. Strategic theme grants of up to £2,500 are distributed under the *#GiveLoveLeeds* programme, while an open pot of micro-grants awards grants up to £500 to support new and emerging community activity across Leeds. The aspiration is that continuation funding for a further year will be made available where possible to the most successful projects in order to provide more sustainable change.

> *If you're looking to make transformational change it's not going to happen in 6-9 months, you need a bit more time. So that's really what we want to be able to say to other donors and fund creators, this is a really good way of working with third sector organisations. Don't just dip in and out, you make an investment over time, support them sufficiently to get a result. That's paid back for us as well in being able to demonstrate a track record locally, and that has certainly got attention in press and broadcast media, and that in itself has become a virtuous circle.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

The Fund launched with a two-year strategic priority of mental health and secured a partnership with the Asda Foundation which donated £380,000 in 2017. Also in 2017 the Fund benefitted from a visit by Prince Harry to a mental health youth project event funded by The Leeds Fund, before visiting the local HARIBO factory, on the back of which HARIBO donated £20,000 to support the Fund's next round of *#GiveLoveLeeds* grants.

Tea & Tolerance - A participatory live art project for social change. Inspired by the York Mosque's act of inviting the EDL to drink tea and play football in 2013, the Tea and Tolerance project is designed to bring people together through conversation and the arts. Aimed at the many multicultural communities in Leeds, and particularly those areas where there have been tensions, the aim is to slow down, really listen and properly share. As a recipient of a £2,500 *#GiveLoveLeeds* grant, the project has now launched a 'toolkit for conversation'.

Leeds Community Foundation covered the core cost money to develop the Leeds Fund and now fundraises for the Fund. In-kind marketing and press support has been invaluable. The Leeds Fund can accept applications that have been submitted unsuccessfully to other funds held by LCF, but has its own grants criteria. Because the Fund is overseen by Community Foundation Trustees there are few extra overheads to running the Fund. One example of fundraising to build the Fund is a networking group called *Leeds Together* which charges for meetings and has already raised £3,000 from two meetings so far this year.

> *To be able to say in 20 years' time that there have been people who have enjoyed being a part of contributing to or benefitting from The Leeds Fund and who have then left legacies would be amazing.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

The future:

The Leeds Fund is developing marketing materials to build wider recognition of the scheme. LCF seeks to develop more partnerships in support of The Leeds Fund and has already started to do this with partners such as *Yorkshire Life* Food and Drink Awards and *The Business Masters Awards* which increase the profile of the Fund as well as raising money. There is ambition to develop a Fund for Bradford in a similar way. Currently the Foundation's work in Bradford is profiled under a #GiveBradford Campaign which consists of the portfolio of new and existing personal named funds and a supporter scheme - Bradford 100 Club - which contributes to the core costs of developing the Campaign.

LoveBrum is a totally independent campaign and registered charity founded by local businesses leaders, describing itself as a 'giving movement'.

Case Study: LoveBrum, Birmingham

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
A 'giving movement' – membership model	Birmingham – in practice any 'B' postcode is eligible	No. Founded by local business leaders and run by a small, dedicated team.	Yes. £77,000 raised and granted so far.	Chosen causes 'receive valuable much needed funding, and 12 month's business and marketing support.' Individuals can volunteer their services.	No. The team scouts out hidden projects and they are voted for. Special campaign themes are decided by the Board e.g. *Bags for Brummies* – homelessness campaign.	Yes. Anyone can become a giving member and vote at fundraising events. Anyone can volunteer. The Board is made up of a mix of sectors.	Small hidden and hard-to-reach projects receive funding to do more to create stronger communities according to priorities decided by community (member) vote.

Founded in 2015 by local business leaders and personalities Tim Andrews and PJ Ellis (Big Brother series 3) LoveBrum is a registered charity that supports 'hard-to-reach' and 'hidden gem' projects across Birmingham. Fundees are often volunteer led groups which don't receive the platform, and funding, that larger charities can.

LoveBrum has a membership model starting at £20 per annum for individuals, £500pa for corporates and £3,000pa for patron partners. It also supports a volunteering platform for local businesses and individuals. The corporate and patron membership fees also cover the overheads of the staff team.

> *Our vision is that everyone is proud to support LoveBrum because they believe it truly changes lives and is the best thing happening in the city.* ***LoveBrum website***

To date LoveBrum has granted out £77,000 to local projects, impacting over 5,000 people in Birmingham. The scheme has over 1,300 individual members, 25+ corporate members, 25 patrons and 100 ambassadors. The scheme has held over 70 events and showcased over 50 'hidden gem' projects (LoveBrum, 2016). LoveBrum aims to support 12 projects per year. Each month, three projects are featured as 'cause of the week', and in the fourth week, LoveBrum supporters vote for the project they would like to see awarded £2,000. The charity with the most votes receive funding for their project. Any causes that don't win may feature on LoveBrum again.

> *In 2016, we showcased over 50 local hidden gem projects. Projects dotted all over Birmingham, supporting our people, health, communities and environment.* ***LoveBrum Impact Report 2016***

A LoveBrum loyalty card provides supporters with offers from local independent shops to popular restaurants and hotels. Money is also raised via LoveBrum merchandise which currently includes a pin badge, T-shirt, hoodie and pen.

> *We like to keep things small and personal. We believe that donors like to know exactly where their money goes so we have monthly update meetings and annual impact reporting.* ***Kate Grantham, LoveBrum Office Administrator***

LoveBrum also runs special themed campaigns, e.g. *Bags for Brummies*, run last winter, which involved 400 bags sponsored by the Birmingham Publicity Association (BPA) and filled with essentials like sleeping bags and warm clothes, being handed out to homeless people at the city's annual Christmas party for the homeless. The event, which has previously been funded by LoveBrum, was staffed by LoveBrum volunteers and saw the West Midlands Mayor, Andy Street, helping with the distribution of the bags.

Smart Works Birmingham – set up in 2016 this small charity helps underprivileged women get back into the world of work by providing interview preparation tuition, and styling the women with an outfit, donated by a leading retail brand, such as Hobbs, Whistles and Evans, so that they can feel confident when walking in to job interviews. Smart Works targets both the young and those over 30 who often find less support for going back to work. Over half of the women Smart Works supports go on to find work. In 2017 Smart Works received a £2,000 grant from LoveBrum which they intended to use to double their client base from 20 appointments a month to 40, and recruit an extra 10 volunteers.

The future:

In January 2018, LoveBrum was awarded £250,000 of Big Lottery funding in a new partnership to expand LoveBrum's reach, and provide even more funding (£50,000) to projects in local communities. Part of the National Lottery grant will enable LoveBrum to more than double its full-time workforce and recruit an experienced Executive Director and administrator in early 2018. As part of the partnership deal, a Funding Manager from the Big Lottery Fund will join LoveBrum's causes committee to help identify new projects which will be put to the LoveBrum public vote.

4.5. Community foundations - the 'best-kept secret in the UK'

> *Community Foundations have been doing this for a long time. Learning from their experience is really important.* ***Jake Ferguson, CEO Hackney CVS***

> *I would argue that Community Foundations are place-based giving schemes in themselves - ALL our funds are place-based, although none of them is the same as the Islington Giving model.* ***Martha Wilkinson, CEO Devon Community Foundation, Wellbeing Exeter***

In the UK, Community Foundations were introduced in 1975 following their inception in the US in 1914, and were strong players in civil society by the 1990s (Feurt & Sacks, 2001). Community Foundations serve a local geographical area (usually at county or regional level) and serve as a point of contact between donors and local need. They encourage local private and corporate donors to donate to a fund out of which grants are then made to local good causes. Funds may be endowed or expendable and may have a specific issue or set of issues they wish to address locally. These funds are typically pooled and invested for maximum gain by the Community Foundation. The Community Foundation guides donors regarding the most effective giving for local needs.

> *We cover the whole of the United Kingdom and we have an unparalleled reach into local communities. Each Community Foundation has an in depth understanding of their local area, what the priority needs are and how best to address these issues. They are able to direct donors to fund causes that they are not only passionate about but that will make the most difference (UKCF, n.d.).*

> *Community Foundations help people and organisations to invest in local communities where it is most needed and where it will make most impact. We envisage a society where communities will be able to support all those in need (UKCF, 2017).*

There are currently 46 Community Foundations in the UK, and their coverage is such that they are able to make grants to organisations in every post code in the UK (UKCF, 2017). Community Foundations vary hugely in size, age and activities across the country. Collectively over the last decade, UK Community Foundations have given out over £1 billion to local charities, impacting 4.7 million people, and engaging over 15,000 people in giving to their local area (generating an endowment of over £580 million) (UKCF, 2017). The 43 Community Foundations operating in England distributed approximately £66.7 million in 2016/17, from an endowment of around £507 million.

In 2005 Community Foundations were hailed by some as the fastest-growing source of new philanthropic funds and leaders in funding community development and redevelopment (Merseyside Community Foundation, 2010). Since then their numbers have remained stable, and their endowment has doubled in the last five years (Pavey, Harrow, & Jung, 2012); and while the level of grants has also remained relatively stable (UKCF, 2017), collectively, Community Foundations can be considered the fifth largest grant-maker in the UK (after the

Wellcome Trust, Leverhulme Trust, Children's Investment Fund Foundation and Comic Relief) (Pharoah, Walker, & Goddard, 2017). Community Foundations are considered leading developers of local philanthropy in the UK, following the Philanthropy Framework that grew out of the Philanthropy Fellowship programme that ran between 2012 and 2014.

The network of Community Foundations is coordinated by an infrastructure body: UK Community Foundations (UKCF) to which each Community Foundation pays a membership fee the scale of which depends on their size. Part of UKCF's role is to initiate and coordinate national programmes run across a number of participating Community Foundations. This is an area where there has been increased activity over the last few years. Some of the major programmes of note include:

- **Community First,** a unique England-wide endowment-donation match funding programme (£40 million of government money) which ran from 2011-2015, allowing Community Foundations to build up local endowments for a more sustainable future of local funding (total collective endowment pot, including investment returns, currently stands at £140 million, while collective grants of £5.8 million have been made)
- **New Beginnings Fund** for refugees and asylum seekers, in partnership with a consortium of UK trusts and foundations and charities (BBC Children in Need, Barrow Cadbury Trust, City Bridge Trust, Comic Relief, Lloyds Foundation for England & Wales, Oak Foundation, Paul Hamlyn Foundation, Pears Foundation and the Rayne Foundation) - £949,000 distributed since 2016, '*to increase the capacity of small community groups to welcome and integrate refugees and asylum seekers into the UK, and reduce the strain on current support networks. The programme promotes more equal, less divided communities*'
- **Building a Stronger Britain Together**, funded by the Home Office, and delivered in part by UKCF with M&C Saatchi (£1.3 million in the first round), '*to support civil society and community organisations who work to create more resilient communities, stand up to extremism in all its forms and offer vulnerable individuals a positive alternative, regardless of race, faith, sexuality, age, and gender*'
- **#iwill campaign / Youth Social Action Fund,** coordinated by *Step Up to Serve,* funded by Big Lottery Fund and the Office for Civil Society (£40 million) with Comic Relief, Pears Foundation and UK Community Foundations adding match funding (£9.6 million) '*to increase by 50% participation in youth social action (volunteering, fundraising and campaigning) by 10-20 year-olds by 2020*'
- **Nationwide Building Society – Community Grants,** to help local communities provide better homes and housing services to people in need and support people off the streets

In recent years Community Foundations have shown a great ability to work innovatively, collectively and collaboratively with diverse partners. For example:

- In 2010 the money raised by the London Evening Standard's *Dispossessed* Fund was match-funded to the tune of £1 million by the Grassroots Endowment Challenge, a £50m government fund administered by the Community Foundation Network (CFN) (now *UKCF*);
- More recently in 2016 the Government match-funded £1 million to help raise funds for the flood victims of Cumbria and Lancashire through those Community Foundations. The Community Foundation for Calderdale subsequently won a *Third Sector Award 2016*: Fundraising Campaign for the *Calderdale Flood Fund* - '*an innovative fundraising campaign that achieved or exceeded its target*'.

Community Benefit Funds including Renewable Energy Funds

Community Foundations coordinate local renewable energy funds and other community benefit funds. These are voluntary commitments by commercial developers to put money into a fund which is then made available to community projects, in order to ensure that the benefits of the development are shared with those communities hosting them. Funds can vary from a few thousand pounds to hundreds of thousands of pounds per year. There are often other benefits, such as in-kind works, direct funding of projects, or local energy discount schemes (Department of Energy and Climate Change, 2014). The English Register of Community Benefits and Engagement currently lists 29 projects with a total community benefit paid this year of

£2,604,890, with an average payout per project per annum of £3,096 – these are mainly onshore wind farms (The English Register of Community Benefits and Engagement, n.d.).

Best practice guidance (Department of Energy and Climate Change, 2014) advocates a journey of community engagement which involves letting local people know about development plans and engaging local communities in discussions, including those in the community who are harder to engage. Many local authorities choose to work with Community Foundations to achieve this community engagement.

Community Foundations and dormant trusts

Around fifteen years ago, the Community Trust for Greater Manchester (later the Community Foundation and now 'Forever Manchester' worked with the Charity Commission around dormant trust funds (those that have spent nothing for 5 years) and managed to release £5 million from councils in Greater Manchester. This is a model now used by many Community Foundations nationally.

UK Community Foundations also work to support the trustees of dormant and 'ineffective' funds (those that have spent less than 30% of their income). During the last decade more than 3,400 charitable trusts from across England and Wales have been dissolved and their assets, totalling over £60 million, have been transferred to a fund with a local Community Foundation. These funds can often be used as 'local funds'.

> *UKCF has been talking to the government for the last decade about helping the Charity Commission identify and nudge dormant trustees to give their money to Community Foundations. If you could get ten of those in an area you've created an endowment fund which is then there to provide sustainable funding in perpetuity. I know how difficult it is to try and engage with some of these trustees, but the government could potentially help with that.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *Some of the money liberated in this way went into endowments, and some had to be restricted to a particular borough. For example,* ***The Stockport Fund,*** *is an endowed fund which wasn't a huge amount to start with, so we're waiting a couple of years to build up interest then we'll open it up for grants. It'll be used for broad community support stuff.* ***Nick Massey, CEO Forever Manchester***

UKCF estimates that by 2020 an additional £20 million of dormant or ineffective trusts will have been transferred and made available for community grant-making across England and Wales (HIWCF, n.d.). In addition, the Charity Commission is looking at a way to liberate funds from very small trusts cost-effectively.

Are Community Foundations reaching their full potential?

There has been some academic analysis of Community Foundations and how they fit into the UK philanthropic landscape, which has questioned whether Community Foundations have yet reached their full potential. Research by CGAP (the Centre for Giving and Philanthropy) in 2012 suggested that: '*there is emphasis on the leveraging of funds and the management aspect of local philanthropy at the expense of detailed exploration of what leadership and empowerment mean at the local level, or of how funds are, or may be, used to strengthen communities*' (Pavey, Harrow, & Jung, 2012). Community Foundations have also been accused of being too close to the state and statutory funding missions for communities (Daly, 2008).

The research labelled Community Foundations as 'settled' organisations within the community development spectrum (rather than unsettling or disruptive) and as reflecting the 'directed' community development form (rather than 'self-help' requiring greater community engagement). In other words, Community Foundations were viewed as being rather staid and traditional institutions funnelling government money, rather than as community developers and leaders of 'disruptive' local philanthropy.

Paradoxically, the research found that due to Community Foundations' relative financial security through their endowments, they were in a good position to strengthen their community leadership roles in 'unsettling' ways (Harrow & Jung, 2016).

> *We find Community Foundations supportive of community development, by adhering to the importance of giving in and for the communities where they operate, where giving is seen as a critical factor before change occurs, though not the only one. Their community leadership role appears limited predominantly to activating giving, though potentially extended, in distributed form through community dialogues. Thus far then, these*

> *Community Foundations are important players in community change in their localities. Their approach to, and understanding of, community philanthropy is not wholly equated with community development but is an integral part of community development achievement. (Harrow & Jung, 2016)*

However, there are signs that Community Foundations' practices may be changing. Greater collaboration with other funders, and innovative ways of working locally, are spreading across many Community Foundations. In addition, and as part of this, the advent of the use of the Vital Signs methodology from Canada was seen by some commentators as a sign that Community Foundations are becoming more active, influential and challenging in tackling local needs with local communities' input (Harrow & Jung, 2016).

Vital Signs – a catalyst for a changing approach to community philanthropy?

Pioneered by Canadian Community Foundations, this was implemented in a number of Community Foundations in 2013/2014 with UK pilot work partly supported by the Hazelhurst Trust. Vital Signs (Vital Signs) is a mixed methodology, combining community engagement, community leadership and community philanthropy. The copyrighted methodology, which is subsidised by UKCF, is based around 10 social themes, including housing, employment, and education, which are identified and graded as to how well the region is performing in relation the rest of the UK (Harrow & Jung, 2016). The Community Foundation Tyne & Wear and Northumberland was the first to publish its own Vital Signs report in May 2013, and since then a further 21 Community Foundations have published Vital Signs reports.

The use of the Vital Signs methodology leads to the conclusion that 'better information will lead to more responsive, hence better, giving in and for communities. Donors' responsiveness will moreover derive from and reflect community – sourced information and community –expressed priorities' (Harrow & Jung, 2016) and putting donors and recipients on a more equal footing (Harrow & Jung, 2016). Indeed, the Vital Signs methodology has been used as the basis for a number of innovative place-based initiatives: including Hackney Giving (see case study on p53), Tower Hamlets Giving and Newham Giving, and THE LOCAL FUND for The Harrogate District (see case study on p17).

Certainly a number of Community Foundations appear to have moved from a more traditional model to more 'unsettling' and 'disruptive' approaches to community development, many in collaboration with other organisations. Examples include East End Community Foundation's work with *Hackney Giving* (see case study on p53), *Tower Hamlets Giving* and *Newham Giving*; Devon Community Foundation's lead on *Wellbeing Exeter* (see case study on p30); Two Ridings Community Foundations' work with *THE LOCAL FUND for The Harrogate District* (see case study on p17); Leeds Community Foundation's *The Leeds Fund* (see case study on p18); Essex Community Foundation's partnership in *Giving for Thurrock* (see case study on p15); Forever Manchester's community development approach; and The Community Foundation Tyne & Wear and Northumberland's approach (see case study on p26).

> *I personally think that the Community Foundation network now is much more resilient and on a much firmer footing than it's ever been. It's just beginning to mature at 35 years old, it's at a tipping point for real growth. It would be a real shame I think to undercut it and dilute its potential with something else. We cover every postcode in the country and I think schemes like Wellbeing Exeter show that Community Foundations can work in very new and innovative ways!* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

In this way, Community Foundations can be seen as facilitators, as well as leaders, of local place-based initiatives and innovation in community development.

4.6. Why don't more Community Foundations adopt the new 'place-based giving scheme' model?

Most, if not all, Community Foundations, have a number of local grant funds that are designated as general pots of money earmarked for projects within a defined area. For example, *The Love Norfolk Fund*, the 'signature fund' of the Norfolk Community Foundation, into which any individual or business can donate, and grants are prioritised according to information from Vital Signs Norfolk, led by a panel of independent community specialists and the Foundations' trustees. Donors are invited to an annual *Love Norfolk* event.

The key distinguishing feature between a local community fund pot such as this and a 'new model' place-based giving scheme is that Community Foundations funds are not a partnership or collaboration but are managed solely by the Community Foundation, although guided by local knowledge (including Vital Signs methodology which includes some element of community engagement) (see p24).

Other Community Foundation innovative funds include things like the *Norfolk Future Fund*, which is a collective giving group, much like a giving circle, open to individual and corporate donors who give monthly donations of £25 and decide collectively where money should be granted using Dragons' Den-style funding events. For many Community Foundations, therefore, the concept of 'another place-based giving scheme' seems to be reinventing the wheel, when Community Foundations feel that they already have an advantage in this.

> *The way we work is by developing specific things for specific locations, so although we are called the Devon Community Foundation we work very locally.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

> *Just because Islington Giving exists doesn't mean that the London Community Foundation isn't also working in Islington.* ***Fabian French, CEO UKCF***

> *When I hear the phrase 'place-based giving' I think: uh, jargon! What do we mean by that? To me it's what Community Foundations have been doing for the last thirty years. We're all about local people giving for good causes.* ***Sue Turner, CEO Quartet Community Foundation***

A case in point is London Community Foundation (LCF), which operates across all London boroughs, enabling it to have an overview of pan-London issues, and act where it is needed most. It does this partly in partnership with others (including Love Kingston and the Evening Standard Dispossessed Fund which it manages). LCF considered the very localised place-based giving scheme idea at Board level and '*couldn't make the economics work*' for them without an external funder to cover costs.

> *The London Community Foundation is able to do more in the less high profile outer London boroughs which otherwise would not be receiving much money from elsewhere. One concern we have about very localised giving schemes is them potentially failing to match money to need because a very localised area tends to have either good fundraising potential but low levels of need or high levels of need but low potential for fundraising. Islington Giving is unique in that the need and the wealth are in the same place – it's not like that everywhere.* ***Francis Salway, Chair, London Community Foundation***

For others, the new model of place-based giving schemes appears to have elements which Community Foundations do not feel would work for them, for example dealing with high volume low value donations.

> *I think some Community Foundations automatically think that place-based giving schemes are all about £10 donations.* ***Jan Garrill, CEO Two Ridings Community Foundation***

> *What we recognised, and this is where other Community Foundations can be put off, is that this is more of a fundraising model and it will require ongoing capacity to run. A lot of Community Foundations just don't see that as their role. I mean I think across the network fundraising is basically considered a dirty word now, but we see this as our role as a Community Foundation. We also see our role as bringing people together around the table, particularly in the East End – Hackney, Newham and Tower Hamlets. So it's not rocket science, we feel that we have a natural role to play in giving schemes.* ***Tracey Walsh, Chief Executive East End Community Foundation***

> *I think some Community Foundations are a little bit wary of taking lots of small donations, because we're not geared up for taking thousands and thousands of pounds in pennies in bucket collections. Without the big chunks of money, whether in donations or endowed funds, it wouldn't make sense because it would be a lot of effort for a relatively small return in terms of what we can do with grant-making. But I think if you have a chunk of money to start a fund and then people want to give into it in smaller amounts then that's great. That's the model we're using.* ***Jan Garrill, CEO Two Ridings Community Foundation***

This research has found that, in reality, very few place-based giving schemes process hundreds of small donations. For Islington Giving, for example, individual small donations form only a small portion of their overall income.

> *Hardly any small donations from individuals come in actually - it's not our focus. We have a friends programme, but the minimum donation for that is £1,000. Of course, we're very very grateful to people who*

want to give. We just don't target these donations. ***Helen Kersley, Programme Director Cripplegate Foundation, lead on Islington Giving***

Many Community Foundations felt that their unique structure and way of working gives them an advantage over other forms: for example, their endowments, fee structure, and listening abilities. Although some acknowledged that more collaborative working could be a good thing for Community Foundations, and some are already trying out new ways of collective giving (see case study of The Community Foundation for Tyne & Wear and Northumberland on p26).

One of the good things about working with the local council is that we draw a fee for managing their funds as part of THE LOCAL FUND, which means that our costs are pretty much covered. ***Jan Garrill, CEO Two Ridings Community Foundation***

The big thing that Community Foundations do really well is to listen to local people's aspirations, rather than imposing a solution on them. ***Sue Turner, CEO Quartet Community Foundation***

Community foundations can experiment and try things, statutory partners can't do that. ***Sue Turner, CEO Quartet Community Foundation***

Case Study: The Community Foundation serving Tyne & Wear and Northumberland

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Community Foundation	Tyne & Wear and Northumberland	No. The Foundation does work in partnership with the local authorities but mainly leads.	There are donor-advised funds and some collective funds.	No.	Yes. Vital Signs reports cover four major areas.	Yes anyone can donate. The Foundation has independent Trustees.	Through donor-advised funds, partnerships, and collective giving aims to engage the community in local philanthropy.

Be prepared to experiment! We were sceptical about some of the things we've tried but we've learned from it. Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations

The Community Foundation serving Tyne & Wear and Northumberland is the largest in the UK by asset size. It was established in 1988 as the Tyne & Wear Foundation, and later expanded to include Northumberland. Increasingly the focus includes the wider North East of England. In 2017/18 the Foundation gave more than 1,700 grants totalling £7.7 million. The Foundation was the first in the UK to initiate a Vital Signs report in 2013 and has since issued a second report in 2015 and a set of four reports in 2017 covering Tyne & Wear, Tees Valley, County Durham and Darlington and Northumberland in partnership with County Durham Community Foundation, Garfield Weston Foundation, Esmée Fairbairn Foundation and UK Community Foundations.

Everything Community Foundations do is place-based, but at Tyne & Wear and Northumberland we would differentiate between funds set up by private donors or business to meet their philanthropic wishes and something more collective. We have had more success with the former but we have also tried to do the latter. ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

The Foundation has a set of *Vital Funds* for each of the local authority areas it covers, which are predicated on the priorities coming out of the local Vital Signs reports. Each of these funds was set up with matching funding from the Community First scheme. Donations are a mix of legacies, one-off unrestricted donations, regular gifts and corporate gifts. Grants are decided wholly by the Foundation.

It's been harder for us to set up collective giving initiatives. We have always struggled with that because most donors come to us and want to do 'their thing' – either because they're quite private about their giving or they're very public (particularly when you're dealing with businesses) and they want to be associated with their giving and not somebody else's giving. ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

Additionally, the Foundation has a number of partnership funds with local authorities, for example the *Newcastle Culture Investment Fund*, which awards grants to arts organisations in the wake of local cuts; and the

Gateshead Fund which came about as a result of the local authority outsourcing its local capacity building programme. The local councils sit in partnership on these funds' grant-making panels but they don't have a majority in the case of the *Newcastle Culture Investment Fund*, meaning that the funding priorities have been able to move away from old council priorities. The Foundation is also adding a crowdfunding platform to some of these funds and matching these donations, to add wider public engagement.

> *We have pooled donations [Vital Funds] but it's still not quite like Islington Giving because what we haven't done is create structures around that to involve donors in determining where the money goes. Partly because we haven't got the resources to do that. These are generally small funds making one or two grants per year. Neither do we have the resources to promote these funds at present.* ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

The Foundation has also funded *Walker SOUP* (Walker Soup, n.d.) in East Newcastle which is a socially-focused crowd-funding project, imported from the US, whereby local residents and employees get together to eat soup, pay into a small kitty, and hear about local entrepreneurial community-benefit ideas which need funding.

> *We're trying to get local councils to think about how they can facilitate civic philanthropy in the wake of CAF's report – Giving a Sense of Place (CAF, 2017) – we think this is what they should be doing. But the difficulty is always that public bodies want to control their money and public don't want to give to the council, so the landscape needs to shift.* ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

The Foundation takes an active part in the *Fourteen* scheme around active living, connecting communities through social action and volunteering; and Comic Relief's *Core Strength Local Communities* grants programme. The Foundation also runs a number of *Collective Giving Funds*, for groups of committed donors to give to specific causes or communities. For example, the *Asian Fund*, *Local Environmental Action Fund*, and the *Women's Fund*.

The Women's Fund – established in 1999 by Dame Margaret Barbour, with an initial donation of £250,000 from the Barbour Trust. The fund supports women-only projects throughout Tyne & Wear and Northumberland. In response to the difficult times in the sector when women's services are under financial pressure, the Foundation is seeking to increase the Fund by a further £300,000 over 5 years. Anyone can donate to the fund, and there is an annual *Women in Philanthropy* event for members. In 2017 the Fund made grants of over £42,500 and helped organisations such as Changing Lives which supports women and girls around experiences where gender is significant, such as domestic abuse, sexual exploitation or the criminal justice system where some universal services may not be able to meet the distinct needs of women.

> *We tried to set up a collective giving fund around health which would have been more participatory. We had a high profile launch event and lots of interested health professionals but at the end of the day we only received one gift! Probably what we needed to do was to put a member of staff on it for a year but we just haven't got that resource.* ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

As well as providing grants, the Foundation provides a range of support to local voluntary and community sector organisations, such as advice, training and connecting to others, with support from the Garfield Weston and Esmée Fairbairn Foundations. The Foundation is also a partner in the North East Social Investment Company (NESIC) with Big Society Capital, the Northern Rock Foundation, Esmée Fairbairn Foundation, Joseph Rowntree Foundation and the Northstar Foundation, to provide repayable loans to charities and social enterprises.

The future:

The Foundation has done scoping work with local authorities to work more innovatively with them around place-based giving and engaging other stakeholders, including crowdfunding options, and hopes to do more of this in future. A new giving circle has been launched in May 2018 to mark the Foundation's 30th anniversary, aimed at young professionals, called *The Giving Network*. The aim is to get a minimum of 30 people giving £30 per month plus Gift Aid into a pooled fund. The Foundation will put some match funding into it. There will be an annual event where a number of small, local organisations will pitch to get funding and non-monetary support (which is more important to younger donors) and members of the giving circle will decide who to support.

Overall, Community Foundations form an important part of the place-based landscape. Many are involved in innovative ways of drawing communities closer by giving and working together for better. Some do this in collaboration with other funders, although this is an area where some feel more could be done.

We need to do more working together. I think Community Foundations should work more alongside national funders. Community Foundations can work across a whole patch, but they can partner with national funders who can and some are putting bigger funds into the real pockets of need. You need both. Things like open days and 360 Giving are starting that process but I think we need to do more to see where these two types of funding can fit together. ***Jan Garrill, CEO Two Ridings Community Foundation***

4.7. Giving circles

Giving circles are groups of individuals who donate money and/or time to a fund and are involved to a lesser or greater degree in how the funding is distributed. Originating in the US, this is a growing phenomenon in the UK, and there are currently estimated to be in excess of 80, with 69 in England (Eikenberry & Breeze, 2015). Recent research has noted significant growth in the number of giving circles and that the majority of them are giving to their local community rather than to national charities (Bearman, Carboni, Eikenberry, & Franklin, 2017).

Previous research has noted that Community Foundations and other philanthropic organisations in the UK are increasingly using giving circles to improve and increase both giving and its impact (Breeze, 2014). Giving circles take various forms including live crowd funding, such as *The Funding Network*, and hosted groups to support a host organisation or a specific cause, such as *100 Clubs* and *The Women and Girls Fund*.

Suffolk Community Foundation runs two giving circles: the Suffolk 100, which has raised over £280,000 since 2011, and is used by the Foundation as unrestricted funding for Suffolk; and The Women and Girls Fund, which has around 24 members and has raised over £80,000 since 2013, and which funds projects aimed at empowering women and girls in Suffolk (this was originally called The Rosa Giving Circle). Each member of the Women and Girls Fund gives £500 per year for a minimum of three years, of which 50% is devoted to grant-making and 50% to building up an endowment; while members of the Suffolk 100 club (who may be individuals or local businesses) each give £1,000 over three years.

Some giving circles are tied to communities of identity, although some are also tied to localities. London has a growing number of 'giving networks' (giving circles operating within but independent of companies in the City and also involving pro bono opportunities), particularly among millennial employees, and recent research has estimated that there is huge potential for this emerging trend to generate £20m in cash donations a year and thousands of hours of pro bono support (if 1% of London's workers joined networks by 2020 (Pharoah & Walker, 2015).

The Funding Network (TFN) – '*the UK's first live crowdfunding charity*' is described as a '*friendly Dragons' Den for social change projects and donors*'. Charities and groups pitch their potential projects to a room full of potential individual funders, pledges are tracked live and often raise thousands of pounds in hours. Since its launch in 2002, The Funding Network has raised over £10 million for over 1,500 projects, and in 2015/16 marked their 10,000th unique donor. TFN works with Hackney Giving (see case study on p53) and Quartet Community Foundation, among others.

4.8. Single issue / beneficiary group funds

Some place-based schemes focus on a single issue or beneficiary group. Some examples of this include the *Young People's Foundations* set up by John Lyon's Charity (see p34), and Brighton's *Rainbow Fund* which supports the HIV and LGBT communities in Brighton and Hove (see case study on p29). A number of single issue funds concentrate on issues of health and wellbeing.

Case Study: The Rainbow Fund, Brighton & Hove

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
A grant-making fund for a community of both place and identity	Brighton & Hove LGBT+ HIV/AIDS community	Originally a fund administered by Sussex Community Foundation, now a community interest company (CIC)	Yes. Expecting around £150,000 to be raised in 2018	No	The Fund is reliant on the knowledge of the local voluntary sector organisations applying for grants and runs Community Consultations	Anyone can donate via LGBT+ venues and Brighton Pride. Has an open scrutiny process to provide full transparency for donors, involving a panel of invited advisors plus two Directors	Provides a hub for local donations to the LGBT+ and HIV community, and encourages joined-up thinking between local grantees

Founded in 2007, The Rainbow Fund is a Brighton and Hove-based grant-making fund for local LGBT+ and HIV/AIDS (HIV) organisations. The Fund started as a way of raising money to commission the AIDS Memorial sculpture in the city unveiled in 2009, and was originally a fund held by the Sussex Community Foundation (SCF). The Fund is place-based in that any project applying has to benefit the community in Brighton and Hove, but it is mainly based on communities of identity – LGBT+ and HIV.

The Fund continued after the unveiling in order to maintain the AIDS Memorial, but due to the amount of money raised it was decided to increase the Fund's scope and become a grant-maker. Although the Fund ceased to be a fundraising organisation at that point, it became a de facto hub for money raised by the LGBT+ venues in Brighton and Hove, and for individuals wanting to give something to local LGBT+ and HIV charities but not knowing who to give to; and for local LGBT+ and HIV charities seeking funding.

> *Until the advent of the Rainbow Fund local fundraising was somewhat haphazard, with fundraisers having to choose a specific charity to support, without knowledge of the bigger picture of need, and often responding to the strongest lobbying which came from larger organisations with paid fundraisers. Smaller and newer 'grassroots' organisations were often left out in the cold. The Rainbow Fund allows fundraisers to donate to a central fund, safe in the knowledge that the money will be distributed fairly to get the best value in supporting members of the local LGBT+ and HIV communities.* ***Chris Gull, Chair, The Rainbow Fund***[15].

The Fund also benefitted from the organisers of Brighton Pride who decided in 2014 that they would ring-fence £1 of every ticket sale for the Rainbow Fund plus any donation individuals wanted to add. The Fund quickly grew from an annual income of around £15,000 to around £130,000 last year. At this point the 10% charge by Sussex Community Foundation 'started to look too expensive' and the decision was made to part ways amicably and set up The Rainbow Fund as a Community Interest Company (CIC).

Lunch Positive – offer a weekly healthy and enjoyable meal and a safe and supportive space for all people living with and affected by HIV. Rainbow Fund's grant of £7,000 helped towards the cost of food, venue hire and lunch club running costs for people with HIV.

Allsorts – The Rainbow Fund granted £5,000 for a youth engagement worker to support the Transformer group offering a safe space for young people aged 16-25 who are trans, non-binary, gender non-conforming or questioning their gender identity.

The Fund started to make larger grants and to lift the limit of the number of applications from any one organisation in recognition of what it saw as the local conditions of LGBT+ and HIV charities in Brighton & Hove. Local groups can now also apply to Sussex Community Foundation's other funds at the same time as The

[15] https://www.rainbow-fund.org/tough-choices-in-this-years-rainbow-fund-grants-round/

Rainbow Fund which is more efficient for them, and which they were prevented from doing when the Fund was held by SCF. The Fund operates on a wholly volunteer basis.

Part of our role as a local funder is trying to encourage more joined-up thinking and community development among local LGBT+ HIV charitable organisations in Brighton & Hove by insisting that all grantees attend quarterly meetings to update and learn from each other's work. ***Chris Gull, Chair, The Rainbow Fund****.*

The future:

Last October The Rainbow Fund organised the first annual summit for local LGBT+ and HIV charities and groups to get together and share ideas and information. They hope to continue this work.

Health and wellbeing – social prescribing

A number of place-based schemes are set up specifically to tackle issues around health and wellbeing of local residents using social prescribing (or community referral). Social prescribing enables GPs, nurses and other primary care professionals to refer people to a range of local, non-clinical services in recognition that health is determined by a range of social, economic and environmental factors which individuals could be encouraged to take greater control over (The King's Fund, n.d.).

Health and wellbeing-oriented place-based schemes include *York Pathways* (see p33), *Wellbeing Exeter* (see case study on p30) and *Brighter Berkshire*.

Brighter Berkshire – a community- initiative launched in 2017, which aimed to help reduce stigma about mental health and improve local opportunities through conversations about mental health. Originally a year-long project in partnership with **Berkshire Community Foundation** and BBC Radio Berkshire, a small group of volunteers raised £200,000 to fund local projects and voluntary organisations supporting those with mental health issues. Brighter Berkshire is now a Community Interest Company (CIC) incorporated in January 2018. The project aims are '*[b]uilding the largest countywide network of diverse people, ideas and voluntary commitment to come together to improve mental health*', as well as developing an online hub for anyone in Berkshire to connect on mental health and wellbeing.

Case Study: Wellbeing Exeter, Devon

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Asset-Based Community Development approach to social prescribing	City of Exeter, Devon	Managed by Devon Community Foundation in partnership with Exeter City Council, Devon County Council, Royal Devon & Exeter NHS FT, New Devon CCG, Exeter CVS (CoLab) and local GPs.	A community grants pot exists to increase the capacity of local VCSOs for initiatives that enable all local people to participate fully in local life.	Yes. Community Connectors suggest and help people volunteer as a step into their communities.	A risk stratification was carried out to identify health issue hotspots; plus. The Big Listen (2017) was a community listening project.	Yes. Steering group of Exeter City Council Director of Communities, Devon County Council Head of Communities, GP, CCG Clinical Lead, Public Health Data Analyst, Devon County Social Care, Community Services Manager NHS/DCC, South West Academic Health Network.	Wellbeing Exeter encourages people to look after their health and wellbeing and become more actively involved in their communities.

Wellbeing Exeter is a strategic alliance of public, voluntary and community sector organisations…to explore better ways of supporting the 40% of patients who visit their GP with socially based rather than medical problems. We are piloting a particular approach to social prescribing, in combination with asset-based

community development to provide firm foundations to enable individuals and communities to improve and promote their own health and wellbeing[16].

Integrated Care for Exeter (ICE) was established in 2014 as a 3-year learning site for designing and testing new ways of working. ICE is funded by Devon County Council, Royal Devon & Exeter NHS FT, New Devon CCG and Exeter City Council. The scheme was founded on the understanding that even within a generally healthy area like Exeter, there are significant inequalities in health, and the life expectancy gap between the richest and poorest is growing. It aims to provide early intervention and help with prevention in order to improve individual health and well-being and to reduce demand on public services.

International studies suggest healthcare contributes only about 10% to preventing premature deaths, while changes in behavioural patterns are estimated to contribute 40% (Wellbeing Exeter, 2017).

In parallel with the health work, Wellbeing Exeter is developing community resilience with a team of Community Builders, managed and mentored by Exeter Community Initiatives. 'The builders take an Asset-Based Community Development (ABCD) approach, using local strengths, organisations and passions as a starting point for enabling greater connection, activity, and collective support' (Wellbeing Exeter, 2017).

Early funding for development and piloting of the scheme came from a Transformation Challenge Award from local government. The ICE Social Prescribing Pilot started in 2015 and has now grown from a single GP's practice to 16 practices city-wide in 2018. In 2016 the system leadership role was given to Devon Community Foundation in recognition of the need for "the state" to step back and allow the sector to lead, and acknowledging that the Community Foundation was best placed to develop trust and alignment between different voluntary and community organisations and stakeholders. The Community Foundation now facilitates and commissions sub-contractors in an '*agile and cost effective collaborative model'* (Wellbeing Exeter, 2017).

As with other place-based approaches to building community resilience, (London, Leeds, Glasgow) ICE has recognised the need to generate a locally-defined architecture that mobilises people, maps existing assets, identifies development opportunities and incorporates mechanisms to respond to those opportunities into its design. This has been recognised as a powerful means of supporting health protection and promotion behaviours as part of an integrated whole-system effort. ***Glasgow Centre for Population Health*** *(Wellbeing Exeter, 2017)*

The scheme promotes: resilient people who are increasingly aware of what exists in their local community to support them; resilient communities that connect people to the services they need to help them identify what they can do for themselves, and what professional support or guidance may be needed (Community Connectors and Builders); and a resilient system of civil society support offering brokerage, development and facilitation within the system to ensure that the needs and aspirations of individuals are being responded to effectively.

Exeter City Council devoted 15% (£600,000 over 2-3 years) of its Community Infrastructure Levy (CIL) to community development with a grants programme currently under consultation.

Exeter City Council really bought into the idea of asset-based community development which has proved to be very useful, because the messages they then understood were that: community development needs to be grassroots upwards, that the local voluntary and community sector has a lot to offer, do no harm, stop imposing what you want on the sector, make us equal partners, etc. ***Martha Wilkinson, CEO Devon Community Foundation Programme Manager Wellbeing Exeter***

Priory Road Park benches – owned by the developer Persimmon the park is a key place for local people to meet as there are no community buildings in the area. The local Community Builder brought together a local man who had recently moved to the area suffering from PTSD and recovering from cancer and the developer to create a 'Bench Project' whereby local people come together to keep the park tidy and make park benches.

Wellbeing Exeter won a National Health Service Journal (HSJ) award in the 'Most effective adoption and diffusion of existing best practice' category.

Wellbeing Exeter is a win, win, win for everyone and an extraordinary example of genuine collaboration between the health service, local authorities and the community. Although partnerships like these are often talked about, it is rare indeed to see it working so well, transforming the lives of hundreds of vulnerable people,

[16] https://www.wellbeingexeter.co.uk/

as well as promising significant savings for local services. ***Martha Wilkinson, CEO Devon Community Foundation Programme Manager Wellbeing Exeter***[17]

The future:

Wellbeing Exeter has secured 2 years' expansion continuation funding for Community Building and social prescribing and the infrastructure support to expand to cover the entire city. Exeter and Cranbrook (a Healthy New Town) have been selected by Sport England as one of 12 locations across England to be awarded Pilot status in a ground-breaking new approach to tackle inactivity in communities, attracting a share of around £100 million of National Lottery funding over four years, to create innovative partnerships that make it easier for people in these communities to access sport and physical activity. Exeter City Council led the bid, while Wellbeing Exeter is one of the pillars of the proposed programme. This will also link in with Sustainability and transformation plans (STPs), Integrated Care Partnerships, and the Life Chances Fund bid among other things.

Another notable scheme in this regard is the World Health Organisation's (WHO) *Healthy Cities*.

Healthy Cities

> *A healthy city is one that is continually creating and improving those physical and social environments and expanding those community resources which enable people to mutually support each other in performing all the functions of life and developing to their maximum potential.* ***Health Promotion Glossary (1998)***

The Healthy Cities programme is a long-term international development initiative, aiming to put health higher on the agendas of local decision makers, and to promote comprehensive local strategies for health protection and sustainable development. They promote community participation and empowerment, intersectoral partnerships, and participant equity. There are currently 26 Healthy Cities projects in the UK, and thousands worldwide.

Healthy Norwich – a partnership between NHS Norwich Clinical Commissioning Group, Norwich City Council, Norfolk County Council (Public Health) and Broadland District Council, Healthy Norwich was launched in 2013. The programme encourages a focus on the social determinants of health, ensuring everyone has a good start in life, greater employment prospects, better housing conditions and good transport facilities. Healthy Norwich has identified some key themes which tackle health inequalities in the city and promote health and wellbeing, including: Promoting healthy weight and lifestyles; Supporting people to make healthier food choices; Smoking cessation and prevention; and Affordable warmth – reducing fuel poverty; as well as Improving good mental health and reducing health inequalities among vulnerable groups and deprived communities. Healthy Norwich includes a grants scheme managed by Norfolk Community Foundation and is underpinned by a Vital Signs report.

4.9. Funding in place

Discussions around the role of independent funders have taken on a new angle in the wake of recent changes, e.g. government austerity measures leading to cutbacks in statutory funding, welfare changes and the move towards more devolved government. At the same time, many funders have been looking at different approaches to more intractable problems such as poverty, homelessness and multiple disadvantage, using more collaborative and 'systems change'[18] approaches (e.g. (NPC, 2018)).

A growing number of grant-making trusts and foundations feel that one of the answers to tackling problems in a more holistic and collaborative way is funding in place – targeting funding at a specific locale with the intention of making a real difference to those people and communities[19]. Place-based funding is defined as:

> *Targeted investment in defined geographic areas… That is, a package of support – which may comprise: multiple grants; particularly large investments; grants and additional activity (capacity building, networking, influencing work. (IVAR, 2016)*

[17] http://devoncf.com/news/latest-news/wellbeing-exeter-wins-national-award/
[18] Systems change refers to tackling a multitude of root causes of complex issues.
[19] For an in-depth review of this work, see IVAR (2016).

Some examples of this include:

Grow – a pilot initiative of Lloyds Bank Foundation England & Wales, operating in Redcar & Cleveland and Neath Port Talbot in 2016-2017, comprised a non-monetary package of support for charitable organisations including consultancy, training and advice. This is currently being evaluated with the report due at the end of July 2018.

The LankellyChase Foundation has recently adopted a 'systems change' approach which '*builds partnerships across the UK to change the systems that perpetuate severe and multiple disadvantage*'[1], and includes several place-based projects such as *Hull Lighthouse* (supporting female street sex workers to exit prostitution), *Leeds GATE* (Gypsy and Traveller Exchange, to improve the quality of life for the local Gypsy and Traveller community) and *York Pathways* Service (to improve mental wellbeing).

York Pathways[20] – a strategic level partnership in York aimed at improving the response to individuals experiencing 'mental distress' and joining up service delivery (changing the system) so that people with chaotic lives don't end up continually presenting at emergency services. The work was initiated by North Yorkshire Police and Together for Mental Wellbeing (a national mental health charity) and funded by The LankellyChase Foundation, North Yorkshire Police, Vale of York Clinical Commissioning Group and City of York Council. '*It was set up with the express intention to not just fill gaps in services and reduce demand on the emergency services but to identify where the gaps were and identify long-term solutions for tackling the issues, centred around improving multi-agency relationships and partnerships.*'

Esmée Fairbairn Foundation – growing local philanthropy[21] - Esmée Fairbairn Foundation (EF) has invested in place-based giving by encouraging more people to donate to their communities via the Community Foundation network. In the early 2000s EF invested £1 million in the *Time for Growth* programme which provided ten Community Foundations with £100,000 of core cost funding. This allowed the foundations to concentrate on building endowments and securing long-term sustainability for their local communities. The £1 million investment succeeded in raising £19.5 million in new endowments over three years. EF invested in a similar project in 2011 - *The Philanthropy Fellowship* programme enabled 35 Community Foundations to provide better donor support and experiences, and build a network of philanthropists committed to funding projects in their local community. The programme found and created over 200 Philanthropy Fellows, 1,500 'Friends' (some of whom formed giving circles (see case studies on p28)), and unlocked over £25 million in new donations over three years.

Pears Foundation has funded a new *Youth Fund* with the Leeds Community Foundation, which encourages applications from organisations which actively involve young people in the design and delivery of projects aimed at enhancing the voice, engagement and influence of young people. The fund is open to any youth organisation in the Leeds and Bradford Metropolitan District.

[20] For an in-depth case study of this scheme see (IVAR, 2017).
[21] See the evaluation of this programme in (Breeze, 2014).

John Lyon's Charity – Young People's Foundations[22] - John Lyon's Charity has established eight Young People's Foundations to date in Barnet, Brent, Camden, Ealing, Hammersmith & Fulham, Harrow, Kensington & Chelsea, and Westminster. These aim to establish a long-term approach to supporting services and funding for young people in the wake of widespread funding cuts to services in the Children and Young People's sector. The Foundations are co-funded with City Bridge Trust (CBT) and a number of London borough councils. Each Young People's Foundation is a membership organisation for local voluntary and community sector (VCS) organisations, and each has its own CEO who brokers partnerships with the local voluntary sector, public agencies and independent funders, to develop local solutions focused on wider system changes as well as immediate interventions. John Lyon's Charity has committed funding of £1.65 million in 2017 to the YPF model, donating £200,000 per year to each Foundation – a sum which is being matched by CBT.

City Bridge Trust also part-funds the London borough giving movement (see p12), while **Joseph Rowntree Foundation** (JRF) funds the Hartlepool Action Lab (see case study on p36). This is a very big change for some funders (and their partners).

> *The Foundation hasn't always worked this way. For most of its history Cripplegate trod its own path as many independent funders do. But over the past 10 years our work with Members and staff of the Council have developed mutual trust and understanding around shared ambitions for addressing local poverty and inequality. This has translated into joint long-term investment and co-production on a number of fronts creating tangible benefits for Islington residents.* ***Cripplegate Foundation*** *(Kersley, 2017)*

4.10. Local authorities working collaboratively in new ways

The New Local Government Network recently published a report called 'Building Bridges' (Gilbert, 2017) which urged that: '*To ensure their ongoing relevance, both funders and councils need to find ways to collaborate which put residents, through civil society, at the forefront of their activity*.' Many councils are actively seeking new opportunities to work collaboratively with local partners. Many existing place-based giving schemes have some sort of partnership with the local council – whether as funders, or as active or passive supporters.

The Bristol Impact Fund – A Council initiative consolidating previously separate voluntary sector grants streams into a single £3.29m pot with the aim of prioritising spending on areas '*that will make the greatest contribution to reducing disadvantage and tackling inequality, through a lens of building social capacity and capital, and developing community resilience and self-determination. The fund was co-designed with the local voluntary sector. Independent funders were drawn into the allocations process, with a view to increasing alignment of funding strategies.*' (IVAR (2017))

Section 106 and Community Infrastructure Levies

A growing area of partnership between local councils and place-based schemes, especially Community Foundations, is the use of Section 106 community development funds and community infrastructure levies (CIL). This is a way for corporate developers to work with local councils to resource civil society support organisations

> *Even at a time of austerity there are still considerable assets within the influence of local authorities that can potentially be used. These include…for example, Section 106 agreements and community infrastructure levy (CIL). (IPPR North, 2017)*

Community foundations have been quite active in this area, e.g. East End Community Foundation, Devon Community Foundation and Quartet Community Foundation, but there is room for much more collaboration with place-based schemes.

> *We manage some large grant funds on behalf of the council and we lobbied the council for Section 106 money. Tower Hamlets was the first local authority to outsource the management of Section 106 money. It*

[22] For an in-depth case study of this scheme see (IVAR, 2017).

was a landmark agreement and it took us years to get there. We manage on their behalf the 'community and social element' of Section 106, because the council recognised that we were better at dealing with small grassroots organisations than they were. ***Tracey Walsh, Chief Executive East End Community Foundation***

The Upper Horfield Endowment fund comes from section 106 money from the new development of several hundred properties by Bovis Homes, and the council said that we need to put something aside to look after this community. The pot was then match-funded and has grown to over twice the original size. The local community decides what it thinks the money should be spent on and there are some amazing small projects. One that really stuck in my mind was one project where someone came forward on behalf of a 9-year old boy who was a young carer, and he really enjoyed cooking, so the community decided to give a grant to give him some cookery lessons and equipment to help him understand about healthy food for himself and his Mum. The most amazing thing to come out of that was that he then understood that the whole community cared about him and he wasn't alone. ***Sue Turner, CEO Quartet Community Foundation***

The council is going to have to be giving lots of planning permission for new housing developments over the next few years and they're very keen for the Community Infrastructure Levy (CIL) to be put into the North Somerset Fund of Funds for use in particular geographical areas and for particular issues, so that will be an enduring legacy of all this construction work. ***Sue Turner, CEO Quartet Community Foundation***

4.11. Other forms of place-based scheme

This report has explored a number of different forms of place-based scheme with different organisations and actors. Two final examples in this section will illustrate that there are many more ways to skin this particular cat. Liverpool Charity and Voluntary Services (LCVS) shows how partnership with the US organisation, *United Way*, opened up doors for both of them to do things differently; while the JRF-funded Hartlepool Action Lab shows what a hybrid model might look like that sits between funding in place and place-based community development.

Case Study: LCVS and the United Way in Liverpool, Merseyside

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
LCVS in partnership with United Way	City of Liverpool, Greater Merseyside	LCVS is affiliated to United Way Worldwide	No.	Yes. LCVS merged with Volunteer Centre Liverpool in 2016.	Detailed analysis of the city, and consultation with a variety of stakeholders is carried out.	LCVS is a registered charity governed by a Board of Trustees from a variety of backgrounds. One of LCVS Trustees also sits on the United Way board.	Opening up doors to funding which smaller organisations might otherwise have been unable to access.

Liverpool Charity and Voluntary Services (LCVS) was founded in 1909 as an infrastructure body to help coordinate Liverpool's vast array of charities and link them with public authorities. LCVS manages a number of funds for people (in much the same way as Community Foundations do), and currently has around £8 million of donor directed funds, while also delivering a range of grants programmes, including for external grant makers. LCVS also provides support, advice, training, networking and representation/advocacy for individuals and charitable organisations.

In 2007/08 talks began between LCVS and United Way in the US that wanted to move into the UK. LCVS agreed to become the gateway partner for United Way in Britain and in 2010 rebranded as 'LCVS / United Way'. This was not a straightforward partnership process, however.

The way things work in the US and the way things work here in the UK are two very different things and it took a long time for us to work out any kind of meaningful relationship between the two organisations. ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

In 2015 the organisation's name was changed back to LCVS with the co-branding strapline used with corporate clients only: 'LCVS is the United Way in Liverpool', to reflect the working partnership status.

In the last couple of years we've worked more closely with the United Way London office and United Way Europe with whom we've worked on a couple of really important pieces of work: One around refugees and asylum seekers where international donors put money into a programme which we've been able to implement

locally; another which has tapped into businesses which have helped us with a play programme that we run in the city. ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

LCVS runs a number of Community Impact Programmes to address the underlying causes of community issues such as poor education, health and income stability. The name and style of these programmes was derived from the partnership with United Way, which has adopted this way of working extensively in the US. Programmes address both short-term crisis points and long-term change. LCVS has so far granted nearly £300,000 funding from their Community Impact Fund to address these issues in grants of up to £3,000 per organisation, with the number of grants increasing each year. Individual grants are made available via health visitors, social workers, voluntary sector agencies, etc. working with people who are in need.

We bring together schools, government agencies, businesses, charities and other organisations to identify a particular need and work in partnership to change the conditions that create this need in the first place. (LCVS, 2016)

For example, LCVS works in partnership with the Local Authority, Merseyside Play Action Council, United Way, Trusts, Private Sector and individual donors to run '*Positive about Play*' with 72 local groups and organisations delivering play schemes that include breakfast/lunch clubs, Citizens Advice advice lines, and safeguarding training, with a pooled budget. From this work LCVS, working with its partners has developed a draft city-wide strategy for children's play which the local authority are currently working on with a view to adopting it in the near future.

It's a local movement, a social movement around children and families. There's plenty of great work going on around the city and we've found that if you bring the practitioners together you can do a lot more together. ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

Positive about Play - thousands of families across Liverpool struggle with child support during school holidays. This scheme provides inclusive and accessible activities for children, and enables families to access support services such as a dedicated advice line and healthy meals. A pool of trained volunteers ensure that play activities can continue. In the last 12 months, over 22,000 children and their families have accessed play activities delivered through Positive About Play.

LCVS also provided support to United Way's *Give Local Grants* which support community based, local organisations to help individuals and families achieve their potential thanks to a good start in life, an inspiring education, a path to income mobility and a healthy lifestyle. The grants programme is funded by Costco warehouse employees in association with United Way's '*Give Local*' campaign, which encourages businesses and their employees to give to support causes within the community local to their operations. Grants are £1,000 and are awarded to communities and organisations that can demonstrate that they are addressing needs related to priority issue areas (education, income and health), particularly those addressing the needs of disadvantaged people.

While doing this, we hope to better understand the range of issues affecting these local communities and to create a clear picture as to level of these needs, what good work is being done to address them and how this work can grow to have even greater impact. This information will help us to target our own work, build long-lasting partnerships with the organisations we fund and to inform our partners about future volunteering and donation options. (United Way, n.d.)

The Joseph Rowntree Foundation (JRF) originally considered setting up a grant funding place-based giving scheme in Hartlepool with other funders, but this plan changed, partly due to not being able to identify other suitable funders working locally, and partly due to changes in key project personnel. Being the sole funder allows JRF the freedom to develop the Hartlepool Action Lab along more experimental lines.

Case Study: Hartlepool Action Lab, County Durham

We're largely trying to do community development with lots of practical day-to-day activities relating to poverty. It's not necessarily the same as community organising which is trying to change systems by lobbying decision-makers. What we're trying to do in Hartlepool is to develop new solutions. And you need both to really change things. ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
Systems change approach	Hartlepool, County Durham.	JRF leads, facilitates and provides a development worker, some seed funding and holds ultimate responsibility, but all actions are agreed and delivered collectively with local residents and organisations.	As of 2017, yes – although only for people and organisations engaged in the work.	Yes, except where technical expertise is needed (e.g. welfare benefit advice).	Yes, a team of volunteer community researchers carried out 400 conversations (in 2016, 200 in 2017) with local people about what it is like and the cost of living in Hartlepool.	Yes, members of the public are welcome to join in the Hartlepool Action Lab. There are no formal governance arrangements.	Through partnership working and agile problem solving, local people are helped to find and deliver solutions to local issues.

> *In the context of thinking about what the role of funders is in developing and sustaining a place-based action, Hartlepool Action Lab is an experiment in sustainability. We were prepared to fail. In fact, in terms of the working methodology that we employed, failure is an integral part of working out the best way to do something.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Funded and managed by the Joseph Rowntree Foundation (JRF), the Hartlepool Action Lab (HAL) brings together local people and organisations to develop solutions to poverty in Hartlepool. The scheme was initiated in 2015, following many years of the Joseph Rowntree Housing Trust providing residential care services in Hartlepool, so when JRF began to think about how it could try to support citizens and communities to solve poverty in a new way, Hartlepool was a natural place to start. JRF also wanted to ensure that the Hartlepool work drew on learning from grant-making by its York Committee and other trusts.

JRF worked with Community Solutions, a US-based organisation that has a track record of facilitating communities to take action on homelessness and other complex social challenges. Their modus operandus includes the principles of: Focusing on outliers - those people or neighbourhoods most likely to fall through the cracks of existing social welfare programs; Engaging the user to design more practical, better informed solutions; and Testing and evaluating new ideas in short cycles to learn what works quickly and build on successful strategies. Community Solutions facilitated workshop-style events over the course of four days in 2016 (two days in 2017), attended by 30-40 Hartlepool Action Lab participants.

£500 was initially made available to Hartlepool Action Lab participants every 100 days, although in 2017 a 'Solutions Support Fund' of £50,000 was developed to resource the participants to be able to achieve their long-term goals.

Community Solutions use a method of 'Action Labs' using a change method called 'Agile Problem Solving', which involves bringing together local people and local and national organisations to identify potential solutions to problems identified by local people. Agile Problem Solving involves the recognition that social problems are complex and constantly evolving, therefore any interventions also need to be flexible and agile. It prioritises local people taking the lead on any action, with the hope that interventions will thereby be more sustainable, which resonated strongly with the approach JRF wanted to take.

> *We were really conscious about making sure our work was part of what already existed rather than to impose something from outside…and looking at what role we could play.* ***JRF worker*** *(Allen, Clement, & Prendergast, 2017)*

Agile Problem Solving also employs behavioural change techniques known as 'nudging' or, in their parlance, the 'switch' (Heath & Heath, 2011) approach which addresses both the rational and irrational/emotional thought processes people employ subconsciously when making everyday decisions (employing 'the elephant and the rider' analogy made popular by psychologist Jonathan Haidt). Using this methodology Hartlepool Action Lab has started to develop resources with and for local residents to achieve their goals of a better life and a stronger community (e.g. 'Making Life Affordable' helps people to think about shopping around for the best deals on food, fuel and leisure activities, money management and better information about welfare benefits (Hartlepool Action Lab, n.d.).

The starting point for the scheme was a listening exercise employing volunteer community researchers who spoke with 400 local residents about their experiences of living in Hartlepool. The findings of the research formed the basis of a collaborative planning workshop at which local people and organisations came together to develop solutions to the ideas and issues raised in the research. The event was called the Hartlepool Action Lab.

> *Hartlepool is a place where many people face multiple disadvantages across a number of issues …. We began to have conversations with local residents and local stakeholders – the voluntary sector, the local authority, some business and other public services – around what could be done to try to tackle the root causes of poverty in Hartlepool….* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

On the back of the Action Lab events three projects were set up: *Poolie Time Exchange* (a time banking project to improve skills and employability – in association with the Tudor Trust which seed-funded this project); *Housing Heroes* (housing for 'looked after' young people) and *Stronger Neighbourhoods* (strengthening communities by local actions).

Housing Heroes – aims to provide the opportunity for every young person leaving care in Hartlepool to own their own home by 2020. The project involves young people aged 18-25 in refurbishing privately-owned vacant properties. The project started with a team of 6 young people, and was successful in attracting pledges of help from 11 local organisations. JRF provided seed funding for the mortgage up front in the form of a repayable loan of £55,000. The keys to the first vacant properties have just been received at the time of writing this report (April 2018).

A second Action Lab event took place in October 2017, building on the learning from year 1 and developing new ideas and approaches.

> *As the scheme has become more established, JRF's role has become more facilitatory, because we feel that money sometimes complicates relationships, and we wanted to see what could be achieved with little-to-no funding and just relying on the people resources and assets. We use the JRF name and our contacts to try to get more people to our events to make things happen – either to support, join, fund or connect them.* ***Jonathan Gibson, Community Development Officer, Hartlepool Action Lab***

The Hartlepool Action Lab is made up of 30 project team members from the local community, 40 community researchers, two paid support staff (paid by JRF) and a growing network of project volunteers and sponsors. The scheme has ambitious targets, exemplified by their '£1,000,000 Challenge', which aims to '*put one million pounds into Hartlepool people's pockets by the end of 2018*' by saving money on food, fuel and helping people claim the welfare benefits to which they're entitled.

> *Being largely reliant on volunteers and existing resources means that proposed activities are not wholly dependent on grant funding to continue the projects, however this poses a familiar challenge of sustainability.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

An evaluation of JRF's work in Hartlepool, carried out in 2017, concluded that, although still at an early stage, it has been largely successful in kickstarting projects which would otherwise not have got off the ground (Allen, Clement, & Prendergast, 2017); however it also sounded a note of caution, pointing out that the whole project relies on people taking part voluntarily in their own time which presents a question of sustainability in the face of continued austerity in Britain.

The future:

Hartlepool has been successful in the first round of the Place Based Social Action programme run by the Big Lottery Fund and the Department for Digital, Culture, Media and Sport (DCMS) and will receive a small amount of development funding to design a local social action plan based on the Hartlepool Action Lab way of working (led by JRF). In 2019, they will find out if they have been chosen as one of up to 10 partnerships to receive up to £240,000 over three years to put their plans into action.

> *One major achievement of the Hartlepool Action Lab is the number of people we've managed to engage: We've recruited 40 volunteer researchers who have been trained in participatory research; 60 people have come to Action Labs and then participated in workstreams; there are many more volunteers who get involved here and there! The initial investment has had a multiplier effect. We are working to build a movement.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

4.12. Concluding remarks on the current landscape of place-based giving schemes

The London borough place-based giving scheme movement developed very much as a city scheme, in response to the stark disparities between levels of affluence and deprivation evident in London boroughs. It is no surprise then that most of the other schemes that follow a similar model are also based in cities e.g. Leeds and Birmingham. This research has shown that in other localities that don't have the same inner-city make-up, place-based approaches have taken rather different forms e.g. Exeter and Hartlepool.

5. Developing and growing a place-based scheme – needs and challenges[23]

Interviews were carried out with each of the thirteen place-based schemes featured in the case studies in this report, as well as a number of other involved individuals and organisations (see Acknowledgements on p68 for a full list of interviewees). Interviewees were asked about the challenges faced when setting up and growing a place-based giving scheme, as well as being asked for suggestions for potential solutions for overcoming these challenges.

Across the spectrum of different place-based schemes analysed in this report there are some **pre-conditions for development and growth** that appear to be universally useful (and in some cases absolutely necessary). The most frequently mentioned factors were practical considerations first and foremost, with funding taking centre stage:

- Seed funding
- Ongoing core cost funding
- A dedicated development worker
- A degree of local affluence alongside deprivation

Following on from these, the challenges associated with developing, growing and maintaining a place-based scheme were felt to be the following:

- Inertia
- Capacity issues / resource scarcity
- Building a reputation and track record
    - Evaluating impact
- Marketing and Communications
- Building partnerships
    - Making and maintaining relationships with corporates
    - The problem with partnerships
    - Avoiding unhelpful competition
- Engaging with the local community
- What is 'place'?
    - Jurisdiction issues

Then there are some activities that are deemed **requisite first steps** that can mitigate the challenges listed above:

- Research the likely take up of giving and be clear about your fundraising priorities
- Invest in design and relationship-building
- Carry out a needs analysis first
- Develop a strong brand

[23] For an in-depth discussion of the development challenges facing the London place-based giving schemes see *A Place to Give* (London Funders, 2017).

5.1. The conditions necessary for a place-based scheme to develop

In order to acquire the *sine qua non* element of funding, place-based schemes need at least one or two of the following: availability of local funders (e.g. local authorities, independent trusts and foundations, local businesses) and/or a certain level of local wealth.

Seed funding for development of the scheme

While research by the Institute of Voluntary Action Research (IVAR, 2016) identified independent funding as key to collaborative funding in place, this research found that a variety of sources provide seed funding for place-based initiatives, including local authorities, grant-making trusts and foundations, and corporations, often in collaboration. Seed funding is seen as essential to initiate a place-based scheme. The London PBGSs have been fortunate in having City Bridge Trust in the vanguard of promoting and supporting the movement, providing funding for many of the giving initiatives within the network, as well as funding the networking and support body for London, *London's Giving*[24].

> *You need the money upfront to do the relationship building. That's fundamental.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

> *Where I think Nurture Development's Cormac Russell gets it wrong is he's wrong if he thinks asset-based community development can be done with no money!* ***Nick Massey, CEO, Forever Manchester***

> *We were lucky in that the local council funded the development of the Fund – giving some money to develop the brand, some to the CVS to manage the Friends scheme for a year, and then also paying a fee to us [the Community Foundation] to manage their grant-making as part of the Fund. Without that we would have struggled.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

After its first year of seed funding (by the local council), Southwark Giving created a relationship with a number of small local funders who clubbed together to fund the scheme.

> *As we didn't have one angel investor, or a Community Foundation who could absorb the infrastructure costs and run the grants side of things for us, we hoped local funders would be interested in becoming investors due to the relationship developed with them. It was very positive when a number of them did choose to invest – especially as we saw smaller trusts display a genuine desire to work in collaboration with each other and with businesses in the borough. They gave to us as part of a 'strategic block grant' to contribute to our infrastructure costs. This was new and different for some of them and they are owed credit for that.* ***Helen Atwood, Head of Southwark Giving***

Ongoing core cost funding

Sometimes considered the 'Holy Grail' of grants, ongoing core-cost funding can be harder to source unless an impactful track record or innovation can be established. While some quick wins may be possible, long-term change in a local community is likely to take some time to achieve.

> *Not having long-term funding is hard to overcome – you can't plan long-term. With short-term funding you have to be seen to be demonstrating impact over one year to get funding for the next year. You just can't take that approach with asset-based community development which is a more long-term approach.* **Sam Hawksley, *Development Lead,* Lewisham Local**

Community Foundations are in the fortunate position of having endowments which can be drawn on, while others need to raise funds on an ongoing basis. Constant fundraising is a drain on already stretched resources.

> *We couldn't do what we do without sustainable funding from the endowment we've built up over 20 years. Funding from Comic Relief and the Big Lottery isn't sustainable – you can't keep a programme going if you're constantly fundraising or waiting for a bid to be successful.* ***Nick Massey, CEO, Forever Manchester***

[24] City Bridge Trust gave £346,000 over three years to London Funders to develop London's Giving, plus grants totalling £117,200 were awarded to local schemes in the London Boroughs of Hammersmith & Fulham, Southwark, Camden, Barnet and Lewisham in 2017.

London's Giving is starting a conversation with regional and national funders around the importance of sustainable funding for the place-based giving movement, with the suggestion to create a fund specifically for the development of schemes.

> *It's always hanging over our heads that my development post is only sort of part-time, and that we're reliant on our City Bridge Trust grant, which is only till next June. So there is that question always in the back of our minds: will we even be here in 18 months' time? When we first got our City Bridge Trust 2-year grant that gave us permission to dream but if you're constantly having to chase funding that kind of stifles the dream a little bit!* **Sam Hawksley, *Development Lead,* Lewisham Local**

A dedicated development worker

This can be 'an unusual and demanding role' (IVAR, 2016) requiring many different skills, a good deal of persistence, and is often funded on a part-time basis, making it even more challenging. London's Giving has compiled a library of lead development worker job descriptions, and also provides training, networking opportunities and support for leads within London[25].

> *If I was to encourage any other areas to develop a giving scheme, I'd say 'if you don't have the dedicated staff, don't do it!' You'll do a bad job of it.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

Many development workers are 'housed' within one of the founding organisations which usually offer in-kind support and the run of the organisation's contact list as well as (or instead of) financial support.

> *Community Southwark is the incubating body for Southwark Giving. As a CVS it's very active and well-trusted in Southwark, with strong and extensive links in the borough. As such it's well-placed to house Southwark Giving. We complement one another by working in partnership. Developing Southwark Giving helped Community Southwark connect with the local business community – links which didn't exist before. So, it's a win-win for everyone.* ***Helen Atwood, Head of Southwark Giving***

A degree of local affluence alongside deprivation

If the primary purpose of a place-based scheme is to raise funds from local residents then there needs to be a degree of local affluence to facilitate this. Equally, if the intention is to fundraise from local businesses then there needs to be a supply of these.

> *Having wealth in the area makes thing easier! In Harrogate there are pockets of deprivation alongside relative wealth, which makes it easier to deal with locally.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

Not having a local supply of money makes setting up a place-based giving scheme extremely challenging as, for example, Giving for Thurrock has found.

> *Thurrock is made up of areas of affluence, but a lot of deprivation. Some residents would see their priority to eat/heat rather than donating £1 to charity. I think that's why Giving for Thurrock has been quite a slow burner; it does make things more difficult.* ***Kristina Jackson, CEO Thurrock CVS***

From a Community Foundation perspective, this challenge is more easily overcome as they are able to move wealth around from area to another within a region – acting as a benevolent 'Robin Hood' able to take money from one area and use it in another, as Fabian French, CEO of UK Community Foundations puts it.

> *Community foundations have the advantage of working across boroughs, so they can play Robin Hood – taking money from one borough to use in an adjacent one.* ***Fabian French, CEO, UK Community Foundations***

> *Would something like this work in Hull where there is an incredible amount of deprivation without necessarily the wealth alongside it? I think that's where Community Foundations come into it because we can look at a place and see that there are many people across the two Ridings with connections to Hull who don't live there. So we can talk to people across the two Ridings about Hull's needs, and literally take money from one place and give it to another because we understand the local scene.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

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[25] For further information contact London's Giving or visit their website at: http://londonfunders.org.uk/what-we-do/london-funders-projects/londons-giving-transforming-and-energising-local-giving

5.2. Challenges faced in the development, growth and maintenance of place-based schemes

A number of challenges face place-based schemes as they start to establish themselves, including: Inertia; Capacity issues/resource scarcity; Building a reputation and track record; Marketing and Communications; Building partnerships; Engaging with the local community; and wrestling with the question: What is 'place'?

Inertia

A giving scheme needs to capture people's imagination and make them want to give and get involved in ways they perhaps haven't before.

> *I think the biggest issue you have to overcome with any giving scheme is inertia! You need to motivate people, by being compelling and exciting. You need a perfect marriage of expertise, the right vehicles, early adopters and seed money to get things going.* ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

Capacity issues / resource scarcity

As described above, many place-based schemes are run by a part-time development lead, some of whom have another role within the lead partner organisation or another job elsewhere.

> *It's bloody hard work! Kate Hainsworth, CEO, Leeds Community Foundation*

While some schemes may be lucky enough to have a small team (e.g. LoveBrum), ambitions often outrun the ready supply of hands.

> *The hardest thing is that there's always so much to do, with a very small team with big ambitions to achieve more. We need to expand.* ***Kate Grantham, LoveBrum Office Administrator***

> *With a population as numerous as Scotland's and a geographical area half the size of Belgium, the county of Yorkshire is almost a country in itself. No wonder a small team working in one of its Community Foundations struggles to make headway. That's why we chose to work in partnership with other organisations.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

Many schemes rely on volunteers to take work forward, but in any context these need to be properly managed and supervised, which creates a cost and concerns around sustainability.

> *We rely on volunteers and local organisations to take the work forward. While it might be manageable for some organisations to spare us a couple of hours a week, for individuals who are doing it in their own time it raises a big question around sustainability.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Building a reputation and track record

Not having a recognised brand can make it harder to build up a reputation and establish a track record for the scheme – often a necessary preliminary to obtaining both further funding and greater community engagement. Developing a good relationship with the local media is one way to build the brand and spread the word.

> *One of the challenges for us is our size and our presence. We're not the biggest Community Foundation or the most well-known so we can't really dictate everything we might want to. So sometimes we have to be more opportunistic and work where opportunities arise, rather than where the greatest need is.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *People don't get involved in stuff that's not been there for a while – reputation is really important. Some people get it straight away but most people, a lot of businesses, need something with a good stable reputation in the community before they'll get involved.* **Sam Hawksley, *Development Lead,* Lewisham Local**

> *I think the biggest hurdle we had to get over was being taken seriously so that we could achieve recognition. The media partnership [with the Yorkshire Evening Post] helped with that enormously, as did the Royal visit we had [from Prince Harry]. The previous track record of the Community Foundation also helped in that we were building on a known expertise in some ways, but it was still very hard.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

Evaluating impact

As part of a successful track record, evaluating impact is key. While many place-based schemes are still finding their feet, some have already carried out evaluations of their work (e.g. Islington Giving, Wellbeing Exeter, LoveBrum, Hartlepool Action Lab), and others are planning to.

> *You need good impact tools, an annual report, and human interest stories are crucial. The donor needs to be involved and see where their money's gone.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

> *You need to be able to demonstrate impact to attract funding! But it's a good thing to do anyway, even if it is hard to measure.* **Sam Hawksley*, Development Lead,* Lewisham Local**

> *We're looking at impact and will try to do some survey work around whether grant applicants would have applied before we set up the Fund, have they used the Vital Signs report, how are they helping locally.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *Impact is not just about the financial and how much is raised, but also about bringing funders together – reducing competition by working more collaboratively. There is new money but that's not what it's all about.* ***Caroline Masundire, Associate Director, Rocket Science***

London Funders commissioned IVAR to write a report ('*Working in Place: A framework for place-based approaches*') in 2016 and further work is underway with consultants, Rocket Science, to identify and develop a set of measurement tools/metrics for place-based impact measurement – at both an individual and collective level[26].

Marketing and Communications

Many place-based schemes find it challenging to establish a brand that doesn't necessarily have the focus or emotional pull of other charity brands. Many are finding it hard to articulate and 'sell' the idea of 'place-based giving schemes' or 'systems change' and are looking for appropriate alternatives.

> *GiFT doesn't have one key focus to capture people's imagination, or pictures of starving children to pull on their heartstrings so it's a more difficult ask.* ***Kristina Jackson, CEO Thurrock CVS / Giving for Thurrock***

> *Businesses aren't going to put their hands in their pockets and people aren't going to climb mountains or bake cakes or do anything else to raise money for 'systems change'!* ***Sue Turner, CEO Quartet Community Foundation***

> *People don't understand place-based giving so how do you sell it to them?* ***Kristina Jackson, CEO Thurrock CVS / Giving for Thurrock***

Building partnerships

This is a key component to place-based schemes – whether partners are founding, steering, funding, active or just generally supportive. The main partners for place-based schemes, in no particular order, seem to be: the local authority, trusts and foundations with a local remit, Community Foundations, local CVS and other voluntary sector organisations, and local businesses.

> *The triumvirate of the local council, the CVS and us [the local Community Foundation] is the perfect balance, plus if possible an anchor business.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *In the second year we transitioned from development phase Advisory Group to a fully-formed Strategic Partnership Board for five years. The Board is a blend of financial investors and advisors from across the sectors and operates upon a first among equals model.* ***Helen Atwood, Head of Southwark Giving***

> *I'd worked in the local authority and worked in partnership before so I knew that we'd be better off working with others to achieve more than we could alone.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *I think if you haven't got buy in from the local authority than can be a barrier – I think that's really important. They don't have to be involved too heavily but they really can open doors and make things happen to start*

[26] See Rocket Science [www.rocketsciencelab.co.uk].

with. After that you really need them not to get in the way too much! ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

There are a lot of challenges to doing meaningful place-based work, and one of them is what partners you can get to the table. ***Jo Wells, Director, The Blagrave Trust***

I think having someone like the local CVS onboard is a really good idea, particularly for a regional Community Foundation. To be grounded and to be true to a smaller locality you need a CVS or equivalent, which already has their ears to the ground and has the trust of the local voluntary sector. ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

Not only do partnerships spread the burden but also create opportunities for shared learning.

We can also learn a lot from national funders who are funding in place. For example I got a lot of my thinking from the work the Rank Foundation have been doing in Hull – they've been doing fantastic work for the last 6 years. ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

Trust and honesty should be the basis for all relationships.

You need trust and honesty. Start where people are at. Don't over-promise. You need to be humble and have different relationships with people. ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

Making and maintaining relationships with corporates

Creating partnerships with corporate partners appears to be seen and experienced as the most difficult relationship for many place-based schemes.

A lot of corporates these days have really well-developed CSR relationships already in place so you have to question whether there is space for another giving scheme. Some corporates have a very prescribed way of giving. ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

Despite this, many place-based schemes have been successful in creating healthy relationships with corporate partners – particularly in London, which offers greater choice and generally richer pickings. For example, Islington Giving has developed a working relationship with Macquarie Group, which became the founding partner and principal funder of the BIG Alliance (Businesses for Islington Giving).

The BIG Alliance has enabled us to innovate and invest over the long-term, directing funds and resources to a need within our local borough. In practical terms, we fund The BIG Alliance and their Project Managers in Islington to connect the dots, find the opportunities, complete the due diligence and to ensure the needs our volunteers are addressing, have an impact and are sustainable. ***Rachel Engel, Head of the Macquarie Group Foundation, EMEA*** *(IVAR, 2016)*

We're fortunate in that Southwark has a thriving and influential business sector, both large corporates and SMEs and there's a seeming increasing appetite for social investment opportunities. Southwark Giving has been able to provide opportunities for meaningful engagement between the business sector and the local voluntary sector in a new way for the borough. ***Helen Atwood, Head of Southwark Giving***

To maintain corporate relationships takes time, dedication and long-term commitment. It's hard work! You've got to take a long-term view, and not expect instant results. ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

Partnerships with businesses can and should be a win-win situation – a place-based scheme offers businesses opportunities to really connect and make an impact in their local area, something many staff are keen to do.

In theory a place-based giving scheme is a one-stop shop for local businesses for their CSR agenda – their donations, their staff volunteering, and their charity of the year. It's an ideal partnership. For example, John Lewis contributed a large chunk to The Leeds Fund because they wanted to be seen as a good neighbour. Highlighting good practice like that is a really powerful nudge to the business sector. You know, if you're going to be moving your head office into an area, it's a much fairer way to contribute to the local area by using a place-based fund, and it saves them a lot of time and hassle figuring out who to give to. ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *Where we have worked most successfully with our corporate partners it's because their involvement is on our terms. And they have joined with us because they acknowledge that we're the experts. They don't want to decide what the strategic priority is, they want to be told.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

The problem with partnerships – the (sometimes) hidden costs of collaboration

In some situations, working in partnership can be seen as a limiting rather than an expanding experience. Some organisations felt that working in partnership slows things down, increases bureaucracy, and forces compromises that sometimes go beyond acceptable limits.

> *We are small, agile, fast-paced; partnership working is slow!* ***Tracey Walsh, Chief Executive East End Community Foundation***

> *We probably wouldn't have achieved as much with The Leeds Fund if we had done it in partnership. The ability to act and respond and do would have been a bit hampered by needing to consult and incorporate other people's priorities in the process.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

> *The City Funds model contrasts quite significantly with what we're doing in North Somerset. Bristol's model is very much driven by governance, lots of meetings with 25-30 people all sitting round the table all putting their views in – huge amounts of consultation and discussion. North Somerset Council, by contrast, is very light touch, and has a partnership which goes back a long time involving the health bodies including the council and the private sector and they intend to put an endowment into a new 'Fund of Funds'. But it's all very light touch, very fleet of foot, not worrying about great big governing documents and not worrying whether everyone around the table agrees to every little detail, the ethos is: Just get on with it!* ***Sue Turner, CEO Quartet Community Foundation***

In other situations there were literal costs to partnership that resulted in too heavy a burden on a nascent scheme, for example Brighton's Rainbow Fund which split from Sussex Community Foundation when the cost of partnership became too high (see case study on p29).

Avoiding unhelpful competition with existing local projects

Another challenge to new place-based schemes is that they may be perceived as competing for the same resources as existing local voluntary and community organisations and projects.

> *One barrier to success can be that people see a new place-based giving scheme as competing with their own local fundraising efforts.* ***Kristina Jackson, CEO Thurrock CVS / Giving for Thurrock***

> *There are already very well-established payroll giving schemes and online giving schemes (e.g. LocalGiving). The fundraising space is getting very crowded, so you need to think carefully how well you're going to compete with these.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

The aim of the London PBGSs is expressly to bring in 'new' money, to create new opportunities and/or better signposting for volunteering and to work collaboratively, not competitively.

> *As a partnership we remain mindful to not compete for funding with the same organisations we want to support. As a result, the Hackney Giving fundraising strategy will ensure that we are reaching a donor group that would be 'out of reach' for groups we hope to support.* ***Hackney Giving Annual Report, 2015***

> *You've got to gain the confidence of the local voluntary sector that you're going to be bringing new money in rather than competing for funds.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *During 2015/6 we undertook … a series of informal conversations with stakeholders across the City. This was a time intensive but critical stage of the process … and allowed for genuine collaboration from the outset. Some conflicts were uncovered through this listening exercise particularly in relation to competition and rivalry between different VCSE groups and organisations…. It was important that the process revealed these tensions as we were able to build in support and external facilitation as an integral part of the overall programme.* ***Wellbeing Exeter Report, June 2017***

Engaging with the local community – giving, granting and volunteering

It is in this area that we find perhaps the greatest difference across different types of schemes. The London PBGSs have developed largely as 'giving schemes' aiming to engage local residents and businesses in giving

money to a fund which is then distributed to local projects (either led by the scheme or by other local voluntary and community groups). Volunteering is often the poor cousin in the equation of place-based giving schemes, usually taking second place (at best, a backseat at worst) to giving money. Despite espousing the ethos of 'everybody having something to give', for many PBGSs it has been more pressing (and often easier) to concentrate first on bringing in the funding before thinking about engaging the community in volunteering projects. The exception to this, in London, is Lewisham Local, which was set up primarily as a volunteering scheme (see case study on p46).

Community Foundations generally engage in slightly different ways, by targeting high net worth individuals and businesses which would like to set up their own named funds – sometimes within a place-based umbrella scheme.

Other place-based schemes have developed less as giving/grant schemes and more as community development activities (e.g. Hartlepool Action Lab, Wellbeing Exeter).

> *Providing volunteering opportunities is a little bit more problematic. We haven't developed a model that is really set up for that yet. At the moment we can point them to Voluntary Action Islington, or, if we know of any local opportunities with the voluntary and community organisations we have relationships with then we can send people there. But we're very mindful of not just passing on a burden, so we won't do that unless we're pretty sure there's a good match.* ***Helen Kersley, Programme Director Cripplegate Foundation, lead on Islington Giving***

> *We're more about encouraging people to find their own solutions, for example through the four Good Neighbours Schemes[27] which we support, which has a very strong element of reciprocity. These schemes have paid coordinators, because volunteering needs coordinating.* ***Helen Kersley, Programme Director Cripplegate Foundation, lead on Islington Giving***

> *Place-based schemes work better in some places than others – for example, you need to have a certain level of social capital, which is difficult in more deprived areas. Community foundations can drag social capital from A to B.* ***Fabian French, CEO, UK Community Foundations***

Case Study: Lewisham Local, London

Connecting community through giving to grow local pride, fairness, equality and opportunity[28].

Description / Type	Geographical specificity?	Equal partnership?	A pot of 'new' money?	Public give time and skills?	Local evidence base?	Open to all? / Transparent governance?	Helping to create stronger communities?
New entity / new model PBGS	London Borough of Lewisham.	Yes. A collaborative group sets the agenda.	Not yet, there are plans for one.	Yes, its main focus has been volunteering.	An asset-mapping exercise was carried out. The initiative also follows recommendations made in Lewisham Poverty Commission (2017).	Anyone can volunteer, and any businesses can participate in giving events or employee volunteering. The collaborative group represents the public, private and voluntary sectors.	Using an ABCD-style approach Lewisham Local aims to help connect individuals, businesses and organisations and help them to make their community better.

[27] Help On Your Doorstep Good Neighbour Schemes, works with residents in Islington to find and own constructive solutions to local issues such as isolation, improving health and wellbeing and the provision of positive activities for children and young people. A key element of this is about increasing the sense of neighbourliness. Over 400 residents are now 'good neighbours'. London's Giving has identified this scheme as a possible solution to the challenge of engaging communities by re-thinking traditional volunteering by blurring the lines between volunteers and beneficiaries.

[28] Lewisham Local website [https://lewishamlocal.com/] Accessed 27.03.2018

Lewisham Local demonstrates that even the least affluent boroughs are rich in social capital. ***(London Funders, 2017)***

Launched in 2016, Lewisham Local is inspired by the vision that everybody has something to give. It encourages community engagement and a stronger sense of place through locals volunteering for local charities and good causes.

The Community Contributor Card, developed by the Rushey Green Timebank in 2015 to reward the giving of time locally, preceded the scheme. The card gives holders a number of 'favourable deals' with many small businesses in the area, and also encourages people to shop local. All sorts of time giving are rewarded, from formal volunteering to befriending and grassroots localism initiatives.

Lewisham Local was initially trialled in two Lewisham areas - New Cross and Downham - largely through asset mapping. In this way a relationship was formed with the local university – Goldsmiths – whose students were keen to volunteer locally. This partnership has grown, and has involved the launch of an online volunteering/internships portal, improved relationships with local organisations and a full-time volunteering officer.

It was a bit of an asset-based community development type approach – although we don't have the capacity to commit totally to that. We were very conscious that we didn't want it to be a top-down approach telling people what they need, but facilitating, encouraging and inspiring the community to do things themselves. Each member of the collaborative is invested in Lewisham Local and therefore has a shared responsibility in its development. ***Sam Hawksley, Development Lead, Lewisham Local***

I guess how we were initially a little bit different from some of the other place-based giving schemes was that where they wanted to talk about 'needs', we wanted to talk about 'assets'. We did that on the premise that if you go with a begging bowl and talk about 'need' you might get a donation, but you won't really get their investment, whereas if you come at people with an opportunity to use what they have, you empower them and hopefully get a longer-term investment. ***Sam Hawksley, Development Lead, Lewisham Local***

Lewisham Local has a collaborative group at the helm, from public, private and voluntary/community sectors, which sets the direction of the initiative and includes: Rushey Green Timebank, Lewisham Council, Voluntary Action Lewisham, Goldsmiths University of London, Business in the Community (BiTC) and Lewisham Education Arts Network (LEAN). Lewisham Local is part funded by City Bridge Trust and is part of the London's Giving network.

Lewisham Local has spearheaded some important local campaigns around free community toilets, free water refills, and employee volunteering / youth mentoring schemes.

Refill London in Lewisham – A pilot scheme for Refill London (managed by the GLA) runs until summer 2018. In the UK alone, it is estimated that 800 plastic bottles per minute end up in landfill or as litter, meaning that at the current rate by 2050, there will be more plastic than fish in the sea. The free water refill scheme is backed by Thames Water and The Mayor of London, and aims to make tap water refills accessible through local businesses becoming free Refill Stations. Lewisham Local works with BiTC to sign up local businesses. People can use the Refill app to find places to top up their water bottles on the go, avoiding further plastic pollution generated by single use plastics.

The future:

Lewisham Local is developing a 'Lewisham Local Fund' which will act as a focal point for giving money and grant-making to local good causes. Part of this may also involve building up an endowment to ensure greater sustainability for the scheme. Lewisham Local will continue to respond to local community needs and aspirations, helping connect local people and organisations that want to give.

Lewisham Local's work and standing have been recognised by Lewisham Council, whose recent Poverty Commission Report recommended that: '*Lewisham Local should consider developing a 'poverty disruption' seed fund to fill the current gap in micro-grants to support local community activity. This could be funded by using relevant financial contributions from planning obligations';* and *'Lewisham Local, working with employers inside and outside the borough, should work towards supporting people who are not ready for work into volunteering opportunities which allow them to develop transferable skills and provide training on how to communicate or translate this in practice'* (Lewisham Poverty Commission, 2017).

5.3. First steps in mediating the challenges

A number of place-based schemes suggested some first steps towards mediating some of the challenges outlined above. These included: Researching the likely take up of giving and be clear about your fundraising priorities; Conducting a thorough needs analysis before setting a strategy; Investing in the design of the scheme; Investing in relationship-building; and Developing a strong brand.

What is 'place'?

One of the interesting challenges for place-based initiatives is defining what is 'place', as this can have very different meanings politically, geographically, culturally and emotionally.

> *The other complexity around this is 'what is place?' In a rural county place is very different. In some instances place can be a single estate, or a town or a village or a city.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

> *Place means really different things to people. It's really complicated and it's not always the thing that will excite people – it can be counter-productive.* ***Rob Williamson, CEO, Community Foundation for Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

> *Sometimes I'm not sure whether we should concentrate on the very local, doing something at district level, or whether there's a piece of work to do at county level. We'll probably end up doing both.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

Place is not necessarily a physical location.

> *Sometimes place is more about identity – if you're from an ethnic minority or LGBT community, your place is going to be that community rather than a geography.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

Issues of jurisdiction

As part of this consideration there are sometimes jurisdictional challenges around working in place.

> *One of the challenges for us is whether local authority boundaries make sense or do they hinder things? Some places seem to have more similarities in common than they have differences but are divided by local authority boundaries. Working across boundaries can be difficult.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

There are also considerations of how best to tackle intractable issues such as poverty at a local level when the origins and drivers may lie at a more regional or national level.

> *It's quite hard trying to tackle something like poverty at a local level, because in many cases the drivers of poverty rest in Whitehall, regional authorities or 'the market'. Plus there's a lot of stigma around poverty. There's a tension between poverty and community development that is tricky to deal with. Obviously this is not to say local communities are unable to mitigate the effects of poverty, because in most cases they are best placed – although not necessarily resourced – to do so.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Research the likely take up of giving and be clear about your fundraising priorities

Any giving scheme needs to be clear whether it is targeting high volume low value donations or high value low volume. This distinction highlights one of the perceived differences between the approaches of Community Foundations and PBGSs, that Community Foundations target high net worth individuals and businesses, while giving schemes target the general public. But in reality this distinction is not as stark as it seems, since very few place-based giving schemes rely on small donations from the general public, and many Community Foundations run 'Friends' schemes and similar vehicles for smaller donations.

> *You really need to do your research about the reality of potential giving in your area, and figure out where your priorities are. Are you going to go for high volume low value donations or vice versa? We felt that in our borough if we'd gone after high volume low value gifts of £10 or £20 a month we would probably have had to spend as much time and money setting that up as we got back. And that's also a very competitive marketplace. We decided instead to work with corporates and secure larger donations. But in an outer London borough you probably wouldn't have that option.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

> *It comes back to the numbers – what's the return on investment? We probably, with our partners, spent about £100k to get £300k. That's not bad. If we'd gone down the route of monthly giving we probably would have been looking at a one-to-one ratio on fundraising. So you need a real multiplier effect.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

Carry out a needs analysis first

Most of the London PBGSs sign up to being 'needs-led' and the majority have commissioned or conducted their own needs analyses of their local areas[29]. The Community Foundation network has also carried out largescale needs assessments using the Vital Signs methodology (see page 28). In most cases this needs analysis shapes the aims and focus of the scheme, and avoids the 'trap' of following available funding and mission drift.

> *At the heart of PBGSs is local knowledge founded on local need and wide-ranging consultation.* ***(London Funders, 2017)***

> *The analytical research of our local community needs was our starting point, because without knowing what the needs are then how could we set up something to help the community in a helpful and meaningful way? Our research concluded that: 'a poverty of opportunities for some leads to a weaker community for all' – a theme which we have adopted as a key motivation. The research also led us to identify a theme of 'Life Transitions' which encompasses various priority need focal areas which we will target resources to over the next ten years.* ***Helen Atwood, Head of Southwark Giving***[30]

> *The idea of people of raising funds collectively in a local place is historic and it certainly has a role. In some cases, yes that money can be used impactfully. But it comes down to what are we raising funds for? Are we being led to set things up just because the funds are there? For example, if we hear that there is a new grant fund pot in our area are we going to set up a new project or reconfigure an existing one so that we can apply for that funding, given that funding is very tight for a lot of VCSE organisations? I think it takes a long time to work out what we really need money for.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Invest in design and relationship-building

Research carried out by *London's Giving* into the capital's PBGSs found that the majority of schemes required between 18 months and 3 years to develop from initial conversations to launch-ready. Participants in this research agreed that this phase cannot and should not be skipped or rushed as it is integral to the functioning of any place-based scheme.

> *In order for something like this to be successful you need to invest in the design, and the trust-building. And people can be very reluctant to do that because it doesn't often look as if there's any return from that but actually, in the long run it's fundamental to success, and if you skip it there will be nightmares down the line.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

> *With place-based work, there's a real need to spend time talking to people, building relationships, building trust, and then to develop work from that. There is a significant cost to that in terms of people's time, although it is a significant part of the process of understanding a place.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Develop a strong brand

Creating a name for yourself can help to open doors, create greater community engagement and ultimately set up a stronger, more sustainable scheme.

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[29] Islington Giving published 'Invisible Islington' in 2008 prior to setting up the PBGS, and 'Distant Neighbours' in 2013; Hackney Giving, Newham Giving and Tower Hamlets Giving all carried out a Vital Signs report via the East End Community Foundation; Southwark Giving commissioned 'A Tale of Two Southwarks' in 2016; United in Hammersmith and Fulham launched a 'Big Conversation'; while Richmond published 'On the Edge'; Hartlepool Action Lab held 'Conversations in Hartlepool'; The Local Fund for Harrogate published a Vital Signs report via the Two Ridings Community Foundation; The Kensington & Chelsea Foundation set up a Listening Project in 2017 after the Grenfell Tower fire disaster; Lewisham Local carried out an asset mapping exercise; The Leeds Fund publishes an annual 'Need in Leeds' report; and Wellbeing Exeter carried out a 'Big Listen' project.

[30] See (Walker, 2017).

You need a strong brand and a good website to signpost people. We had an individual from UBS, one of our founding corporate partners, to help us create our brand, so it didn't cost us anything. ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

The City Fund needs to capture the heads and hearts of the people if it's going to be a serious fundraising vehicle, so I've put an idea in that we should have the initial kick-off campaign as 'no child goes hungry in our city' as we've got around 20 thousand plus children living in poverty in the city at the moment. ***Sue Turner, CEO Quartet Community Foundation***

5.4. Concluding remarks about developing and growing a place-based scheme

The issues outlined above should be considered alongside some key elements identified in previous research on successful collaborations across sectors working in place. For example, the Institute of Voluntary Action Research (IVAR, 2016) identified the following considerations:

- Independent funding as a source of support for developing new ways of working
- 'Collaborative champions' or key individuals that can drive the work
- Developing appropriate processes through co-design
- Clarity about roles and responsibilities
- Listening and responding to service user voices
- Investment of time and resources in building relationships and processes
- Shared understanding about impact and reporting
- Sustainability and exit built into the process

While London's Giving (London Funders, 2017) identified key challenges for London PBGSs as:

- Finding and supporting development leads
- Sustainable funding
- Community engagement
- Evaluating impact

While most of these previously-identified elements and challenges were also talked about by the place-based schemes in this research, a number of others were identified, and the emphasis on challenges for schemes working outside of London was perhaps a little different, especially as resource scarcity can be a bigger challenge outside the capital.

6. How place-based schemes are organised and managed

Place-based schemes take a number of different forms as outlined in the Venn diagram on page 11. Within each 'type' of scheme there are further differences in structure, organisation and management.

A Place to Give (London Funders, 2017) describes one of the characteristics of PBGSs as 'a commitment to collaborative working; pooling resources, sharing intellectual and financial capital, where each has an equal voice and brings a different perspective.' In conducting this research into place-based initiatives across England, including the London movement, it is concluded that this description is more of an aspirational or idealised picture. In reality the majority of place-based schemes appear to be led by one organisation which, perforce, guides and must often cajole its partner organisations into action. Without that leading force majeure it seems unlikely that many place-based schemes would ever get off the ground.

For example, where Islington Giving is formally a partnership of seven funders, it is led and run by staff from its founder, Cripplegate Foundation; the Kensington and Chelsea Foundation is an independent foundation; The Leeds Fund is run by Leeds Community Foundation; The Rainbow Fund used to be managed by Sussex Community Foundation but is now an independent CIC; Giving for Thurrock is run by Thurrock CVS; Hartlepool Action Lab is led by JRF; and Wellbeing Exeter is managed by Devon Community Foundation.

What partnership looks like is important. A partnership where a number of partners sit round the table and each has a role, we've found that quite challenging, because if one party doesn't deliver then it can all fall apart. And there's a huge reputational risk for you. Whereas if one party leads then they're responsible for all

> *elements. There are still partnership elements where donors are involved in the decision-making, and engaged in volunteering opportunities. For us this model makes life easier, despite it being more work, as if things go wrong we've only got ourselves to blame and we can fix things. If things go wrong in a partnership there's all the extra work to find out what went wrong, who's to blame and how to broach the subject and fix the issue.* ***Tracey Walsh, Chief Executive East End Community Foundation***

Of the place-based schemes analysed in this report only THE LOCAL FUND for The Harrogate District[31] and Lewisham Local[32] appear to be truly running as partnerships; while LoveBrum is led by an independent team. Where partnership comes into its own is in the steering / advisory groups or Boards, and collaborative ways of working which the majority of these schemes employ. In laying out how partnership should work in principal, *A Place to Give* (London Funders, 2017) advises: '*Be transparent, make it clear who is involved and why and how representations can be made.'*

Whether to become a registered charity is another conundrum facing place-based giving schemes. A number of the initiatives explored in this report are registered charities or Community Interest Companies, while others are held as funds or projects within the lead partner organisation, and others still are unregistered organisations.

> *The CIC structure was adopted as it's leaner, more efficient, and carries lower overheads than working in partnership with Sussex Community Foundation, so more money goes to the community.* ***The Rainbow Fund***

Place-based schemes cover core costs either from the lead partner, or raise core cost funding from a variety of sources. Of the schemes interviewed for this report, seed funding and core cost annual funding ranged from £30,000 to over £200,000[33]. For example, in 2016 Cripplegate Foundation's contribution to Islington Giving in terms of staff time, support costs, and direct campaign costs totalled £203,725[34].

7. How successful collaborations are formed and maintained

Forming successful partnerships and collaborations is at the heart of place-based schemes, which need to perform a tricky alchemy of linking up existing local assets and resources as well as bringing in new ones. Most schemes try to build on existing assets, resources and relationships.

> *Initially we started with making links and building on what was already in place: Exeter City Council already had a Community Organiser post in Wonford and a Get Active Organiser for the City.* ***Wellbeing Exeter Report, June 2017***

Most schemes agree that achieving successful collaborations is the hardest, most rewarding and longest-running task they face. It has many facets, including introducing the new concept of a place-based scheme, what it is and what it hopes to achieve, and gaining the trust of local residents and organisations.

> *One of the hardest things we do when we go into a new area is convincing people that we're not the local authority, that we haven't got a bottomless pit of money and that we're not representing anyone but them. It takes six months to build trust and relationships with a new local area.* ***Nick Massey, CEO, Forever Manchester***

> *It can be quite a difficult thing for people to get their heads around. My experience here has been that you have to have and facilitate long, long conversations with and between the public sector and the voluntary sector and delivery partners. It takes a long time because actually what you're doing is* ***a system change****, and in order for that to be successful you have to build trust and that takes time. It's messy, it's painful, but it's all about relationships.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter*** *(emphasis added)*

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[31] Described as a three-way partnership between Harrogate and Ripon CVS and Two Ridings Community Foundation and Harrogate Borough Council.

[32] Run by 'a collaborative group' of organisations including Rushie Green Timebank, Lewisham Borough Council, Voluntary Action Lewisham, Goldsmiths University of London, Business in the Community, and Lewisham Education Arts Network.

[33] Where costs can be allocated specifically to the scheme.

[34] Cripplegate Foundation Annual Report and Financial Statements for the year ended 31"December 2016. Giving in terms of staff time totalled £160,411, support costs of £21,462 and direct campaign costs of £21,822.

One way to build relationships and trust is by the aforementioned impact measurement, and establishing a brand, etc.

> *Having really good impact tools and having a good annual report which illustrates human interest stories and shows pictures of individuals who have been impacted by the work of the scheme is really crucial in getting donors on board and showing them transparently what the impact of their donation is. Keeping it real is a key aspect of building relationships.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

But sometimes it just comes down to personality and/or chance – being in the right place at the right time and finding a good fit between people and organisations. Having a shared view of things cannot be under-estimated.

> *I talked to a few organisations with a view to partnering, but with X we just clicked, we clearly had a shared vision.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *Following a chance meeting at a conference, Macquarie began work with the Cripplegate Foundation…* ***(London Funders, 2017)***

> *Sometimes the planets align - I feel as if we've got a window at the moment of the next 12-18 months while everyone's in the frame of mind of being a bit more collegiate, and we need to see what we can do with that.* ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

7.1. How to build successful partnerships with corporates

Since corporate partnerships appear to be the hardest to develop and maintain, it's not surprising that most advice given related to these. Advice ranged from presenting what you already do in the best light to developing programmes, projects and even strategy based on the corporate's goals and interests – depending partly on the level of involvement and funding.

> *Seeing things through the eyes of corporates and working with them to set priorities for the fund is probably the way to go. They want transparency and good systems in place to monitor impact. You've got to empower corporates to give.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

> *Our strategy of making small grants is a big draw for private sector funding as small amounts of their money can make a massive amount of difference.* ***Nick Massey, CEO, Forever Manchester***

> *Initially our key supporter in our opening year was John Lewis Leeds. As they were our anchor supporter we aligned our first two rounds of #GiveLoveLeeds grants with John Lewis core values, so there was a certain amount of reciprocity there. This allowed us to give some focus for grants which aligned with our values and vision for The Leeds Fund. Among these values are 'sustaining communities', and 'good neighbourliness', which worked very well for both of us.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

Several schemes talked of the benefits of showing businesses exactly how their input makes a difference locally.

> *From a business point of view, we take them out on a tour of local projects, which are probably literally about 200-300 yards from their offices, but they didn't realise they were there. But once we take them it's a case of 'seeing is believing' and then they get it and they really want to give to their local community because they understand then what the issues are.* ***Tracey Walsh, Chief Executive East End Community Foundation***

> *We took corporate partners on tours round the projects they were investing in so that they could see what's happening with their donations.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

Others talked about meeting corporates halfway, talking their language, and understanding their needs as well as trying to meet yours.

> *We need to talk with businesses and figure out how they can make a real difference in their local area and then make the ask more sensibly and coherently than before, then you might actually make a real difference.* ***Jan Garrill, CEO Two Ridings Community Foundation / THE LOCAL FUND for The Harrogate District***

> *It's really important that you're not just after donations when you build a relationship with corporates. A lot of businesses want a volunteering programme to sit alongside any giving, and that's the hard part and needs good management and lots of time and resources.* ***Jake Ferguson, CEO Hackney CVS / Hackney Giving***

But it doesn't always go smoothly, as many charitable ventures seeking corporate sponsorship would admit, and it's sometimes a matter of trial and error[35].

> *Another corporate sponsor wanted a theme which we felt was too narrow, and would have precluded some organisations doing very localised community work which we wanted to benefit. So it didn't quite land right and that's just an indication that we're still learning how to partner effectively.* ***Kate Hainsworth, CEO, Leeds Community Foundation***

7.2. Learning and adapting when things don't go to plan

Directly inspired by Islington Giving, Hackney Giving launched in 2014 on the back of the Hackney endowment which was being administered by the East End Community Foundation and which had benefited from the Grassroots Grants initiative.

After working together effectively for three years, it became clear that the two organisations had different visions for what Hackney Giving should and could become, which has led to a dissolution of the partnership and the evolution of new, different schemes which will co-exist and complement each other.

Case Study: Hackney Giving, London

> *The Hackney Giving scheme encountered a number of capacity challenges which eventually led to the scheme being put on hold. However the scheme still attracts small local donations which are channelled into community projects, and we still hope to rise from the ashes like a phoenix.* ***Jake Ferguson, CEO Hackney CVS***

Hackney Giving started as a collaboration between Hackney CVS, the East End Community Foundation (EECF), Hackney Council, The Funding Network and corporate sponsors (UBS, Linklaters, Société Générale and State Street) as both Hackney CVS and EECF recognised the need to address the issues caused by high deprivation in the borough, combined with increasing gentrification which was bringing new people and businesses into the borough but not necessarily to the advantage of all. The scheme raised and distributed over £300,000 to local projects over three years.

The priorities of the fund were agreed by the partners based on a range of evidence including the *Vital Signs* report carried out by the East End Community Foundation, and local insight provided by Hackney CVS. The steering group included representatives from Hackney CVS, East End Community Foundation (EECF), East London Business Alliance (ELBA), Islington Giving, London Borough of Hackney, UBS and Volunteer Centre Hackney.

The giving scheme's model was to award small grants of up to £5k to charities supporting health and wellbeing and employment for local people via an open grants application process, and via Hackney Giving Live - a regular live crowdfunding event delivered in partnership with The Funding Network. AT these events three local charities are given 6 minutes to pitch 'Dragons' Den-style' to invited guests, followed by a Q&A. Events typically raise between £8,000 - £12,000. Volunteering support focused on workshops to improve community organisations' pitching and presentation skills in the form of "Pitch for Success" events.

Congo Peace Fund (now COPEF Training Skills) – a registered charity delivering skills for life for disadvantaged women from BME backgrounds (largely the Congo and Angola). The charity received a grant of £2,250 from Hackney Giving in 2016 to deliver a programme of hairdressing and beauty skills to prepare them for work in a salon or as a freelancer. Training courses also build the women's confidence and English-speaking skills. On the back of this successful project the charity has now set up a young women leaders group to engage more women from these backgrounds.

The scheme's original vision was to raise £1 million over five years, mainly from larger corporate donations in the first instance. It was successful in getting a number of local corporates on board (see above), and cemented relationships with the East London Business Alliance (ELBA) (which offered capacity-building support to potential grantees), Hackney Council (which helped to shape the grant criteria), and The Funding Network (TFN) (which helped deliver Hackney Giving Live events).

[35] A Place to Give (London Funders, 2017) includes more information and discussion of place-based giving schemes working with businesses.

The attraction of the giving model is to bring donors together to address local issues rather than everyone doing their own thing in a scattergun approach which doesn't bring about real change. ***Tracey Walsh, Chief Executive East End Community Foundation***

Challenges arising

The Hackney Giving scheme encountered a number of challenges which eventually led to the scheme being put on hold (although the scheme still attracts small donations which are channelled into community projects).

Since Hackney Giving's launch, volunteer opportunities have been few. ***Hackney Giving Annual Report, 2015***

Capacity – East End Community Foundation (EECF) was formed from the 2012 merger of the Isle of Dogs Community Foundation (IDCF) and St Katharine & Shadwell Trust which took time to embed, and soon after EECF was awarded a grant from City Bridge Trust to deliver its place-based giving initiatives across Hackney, Newham and Tower Hamlets, meaning that resources were spread more thinly. At the same time, Hackney CVS wanted to get things up and running more quickly.

Funding – initial funding from the Big Lottery Transforming Local Infrastructure programme helped to resource staff time to explore the development of Hackney Giving for the first year. After that funding ran out, administering Hackney Giving was subsidised by Hackney CVS and EECF, meaning that neither organisation could devote as much time to the project as they would have liked.

Differing goals – While Hackney CVS wanted to make small grants of £5,000 to as many community projects as possible, EECF felt that more impact could be achieved by making larger grants to fewer organisations.

Despite an excellent working relationship, in early 2017 EECF and Hackney CVS amicably agreed to dissolve their partnership in Hackney Giving and develop their own approaches.

The future:

Hackney CVS intend to carry on with the Hackney Giving Live events in partnership with The Funding Network, and hopes to raise funds to develop this further. Along with other partners, Hackney CVS have applied to the Place Based Social Action programme run by the Big Lottery Fund and the Department for Digital, Culture, Media and Sport (DCMS) and been successful in becoming one of 20 projects chosen in stage 1 to receive a small amount of development funding. They will work in partnership with Locality to design a local social action plan that will include Hackney Giving. In 2019 they will find out if they have been chosen as one of up to 10 partnerships to receive up to £240,000 over three years to put their plans into action[36].

EECF will launch their own fund for Hackney later this year, and concentrate on mental health issues, giving grants of between £15,000 and £20,000. Having researched the local issues around mental health, EECF are confident they have identified where gaps in services most need to be filled.

Both EECF and Hackney CVS are confident that the two schemes can co-exist without poaching from each other's funding bases, and that having two schemes instead of one will ultimately create more benefit for Hackney.

If we were to do things over we would do some things differently. For example, we would have ensured that we had more staffing resources upfront to enable the scheme to develop properly over at least 5 years, and to take time over building relationships, particularly with local businesses and fantastic corporate partners. ***Jake Ferguson, CEO Hackney CVS***

We've learned from our experience with Hackney Giving. We don't want to rush into launching a fund that only lasts for a short period. We're putting a lot more time and effort into the research, and getting the framework right before formally committing to delivering it. ***Tracey Walsh, Chief Executive East End Community Foundation***

[36] The London boroughs of Islington and Hammersmith and Fulham have also been successful at stage 1; as have Thurrock and Hartlepool.

8. Civic Philanthropy – Mayoral involvement in place-based initiatives

There is currently renewed interest in how the historically-philanthropic role of Mayor can be revived and revitalised to encourage greater giving in the landscape of 21st-century Britain[37]. In the context of this report it is of most interest how mayors work collaboratively with other funders and the existing and emerging place-based philanthropic structures, and what potential there is for future collaborations. This section outlines the current state of civic philanthropy with some key examples.

The current research finds that while there is currently some partnership working and some collaboration between place-based funders and schemes, perhaps most notably with Community Foundations, there is considerable scope for more. Specific areas of collaboration which place-based schemes could consider include: being the mayor's charity of the year or otherwise benefiting from the Mayor's Fund (including managing the grants process for Community Foundations); asking the mayor to open doors to other collaborative partners; and becoming more involved with the mayor's strategic planning process by offering the unique resources at the disposal of a place-based scheme; helping to put in place sustainable philanthropic structures which will survive the constant change of personnel at the Mayor's office.

8.1. The mayoral landscape

England currently has 8 directly-elected (Metro) Mayors of larger areas[38], 16 directly-elected Mayoralties administering a single local authority area, 23 Lord Mayors, many of whom hold philanthropic funds which are part fundraised and granted out. In addition, there are 48 Lord Lieutenants in England[39] and 47 High Sheriffs, the majority of whom hold philanthropic funds (many via Community Foundations).

London has had a directly-elected Mayor since 2000. This role works with the Greater London Authority (GLA), a unique and strategic city-wide government consisting of the Mayor and a separately-elected London Assembly. As part of the Government's devolution deal, six directly-elected mayors were put in place in May 2017 in the combined authority areas of: Greater Manchester, West of England, Tees Valley, Liverpool City, West Midlands and Cambridgeshire and Peterborough. 70% of the population of the North of England now live in an area with a directly-elected Mayor and they are seen by many as presenting new opportunities to work and engage differently, more strategically and collaboratively for the good of communities across wide areas (IPPR North, 2017).

The devolved powers of these roles vary according to their local devolution deal, but as originally envisaged, devolved Mayors are intended to revitalise local areas: '*We have seen that a single municipal leader can inject dynamism and ambition into their communities*' (The Conservative Party, 2010).

8.2. Mayor's Funds

The model of creating a fund that is actively promoted by the Mayor to attract funding for issues specific to the city in question was championed in New York under Mayor Michael Bloomberg (2002-2013). Bloomberg famously raised over $400 million during his tenure, and the fund continues to be a focus for private, public and corporate donations and spending in the city. The principle is that anyone can donate to a Mayor's Fund and the money will be distributed according to the priorities set by the mayor.

In the UK a number of Mayor's Funds have been set up along the same lines, to benefit specific areas, and to work with others to tackle specific issues. The two most prominent Mayor's Funds to date are in London and Manchester.

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[37] See e.g. Davies, R. (2017); and Rocket Science's current programme of work looking at the role of the GLA in supporting and encouraging philanthropy in the capital.

[38] Including Sheffield in 2018.

[39] Including the City of London which position, uniquely, is held in commission. The Lord Mayor of the City of London is the head of the Commission of Lieutenancy.

London – the Mayor's Fund and the GLA

The Mayor's Fund for London was established in 2009 and currently, under Mayor Sadiq Khan, distributes around £3.5 million annually (Davies, 2017). The Fund is growing, and in the last year alone, has increased its income by 28% and charitable investment by 44% (Patten, n.d.). The Fund's original aims were to tackle disadvantage in children and young people in London, but it now tackles a number of other city issues including homelessness and knife crime. The Mayor's Fund for London (MFL) is an independent charity and operates programmes which both span London or target one or two specific boroughs, and aim to '*reflect local context and need*' (Patten, n.d.).

In addition to the Mayor's Fund, the GLA has a number of other philanthropic projects including some innovative funding and volunteering mechanisms: *Team London* – which encourages and enables Londoners from a variety of backgrounds to volunteer with local charities; *Crowdfund London* – which enables local communities within London to crowdfund their projects to solve their own issues and create stronger neighbourhoods; and *Penny for London* – a micro-donation scheme in partnership with Barclays, Transport for London, Visa, Evening Standard, Magic FM, Goldman Sachs and Morgan Stanley, which allowed Londoners to donate pennies every time they made a contactless payment at a participating venue (now discontinued).

The MOPAC (Mayor's Office for Policing and Crime) Community Seed Fund – launched in 2017 as part of the Mayor's Knife Crime Strategy, managed and administered by the **London Community Foundation** for grassroots community groups working to reduce knife crime in those communities disproportionately affected. £250,000 was made available in 2017/18 and a further £1.15 million was announced in 2018. This will work alongside the Mayor's £45 million Young Londoners Fund for local communities and charities to help young people fulfil their potential particularly those who are at risk of getting caught up in crime and the Home Office's anti-knife crime projects. One of the first projects to benefit from the Seed Fund was the **Hammersmith and Fulham Anti-Tribalism Movement,** which received £31,173 to work in partnership with the Council of Somali Organisations, delivering the 'Quit Knives Saves Lives Desistance Programme' to tackle the spike in anti-social behaviour affecting young Somali men living in London.

The London Mayor and the GLA work in partnership with the local voluntary and community sector in several ways, including around such issues as homelessness and knife crime. In addition to this, the GLA is supporting the '*Hub for London*' – a new infrastructure organisation to support London's civil society, as recommended by the *Way Ahead* report (London Funders, 2016), the final report of the Review of the Future of Civil Society Support in London. The Hub is a sector-led initiative funded by City Bridge Trust, and will develop standardised resources that can be customised and delivered locally across London.

The London Homeless Charities Group and the **'No Nights Sleeping Rough' Taskforce** – a coalition of charities and other organisations to tackle rough sleeping, alongside the commitment of £50 million of public money to provide accommodation for those moving from hostels to long-term housing as part of the Homes for Londoners – Affordable Homes Programme (2016-2021).

Despite all this, it is felt that: 'At present the Mayor and the GLA's strategic vision and objectives on philanthropy are not clear and there is limited understanding of the potential of philanthropy to contribute to London's civic renewal and social integration.' (McLoughlin, 2018). A review is underway to establish, among other things, how the London Mayor could combine his powers with others, including the Lord Mayor and mayors of other capitals and cities to create greater giving as part of a wider Civil Society Strategy for London[40].

[40] See Rocket Science: http://rocketsciencelab.co.uk/2018/03/26/gla-philanthropy/

8.3. Devolved (Metro) Mayors

Greater Manchester

Former Cabinet minister Andy Burnham, the first directly-elected Mayor of Manchester enjoys a more extensive set of powers than in other city regions, including over crime, health and social policies. Burnham has established a Mayor's Fund specifically to tackle the issue of homelessness, which he has pledged to end by 2020 (IPPR North, 2017). The popularity and success of this move can be seen in its first month's fundraising total of over £50,000 – half of its total target for the year (Britton, 2017).

Mayor Burnham has shown inspiring philanthropic leadership, following Mayor Bloomberg's lead in using his own money, by taking a 15% salary cut to save the city money (McInroy, 2017). Burnham has also been praised for showing great leadership and visibility in the aftermath of the terrorist attack at the Manchester Arena in May, leading the city's response and mourning (Jeffrey, 2017).

> *One thing I am bringing through as Mayor of Manchester is a new relationship with the voluntary sector where we move away from this position of distrust, where we make them compete for project funding or annual funding, and constantly re-tendering. Let's welcome them in as equal partners in the building of our communities, let's give them five or even ten year contracts, core fund them, so that communities can contribute to the things we want to achieve.* ***Andy Burnham, Mayor of Greater Manchester*** *(Civil Society online, 2017)*

Burnham is also using his considerable convening powers to coordinate across different departments and localities, 'breaking open silos' (Jeffrey, 2017) to address the large number of children who start education without being 'school ready', as well as improving the quality and availability of apprenticeships.

Other Metro Mayors

Other Metro Mayors have been mainly working more behind-the-scenes on the philanthropic front. James Palmer, Mayor of Cambridgeshire and Peterborough, is mapping the needs of his area to analyse the patterns of disadvantage; Ben Houchen, Mayor of Tees Valley, has negotiated a deal with Teesside Pension Fund to invest up to £200 million in local projects for inclusive growth; Andy Street, Mayor of the West Midlands, has launched the 'Mayor's mentors scheme' to support young people into work and the 'Change into Action' campaign around rough sleeping; Steve Rotheram, Mayor of Liverpool, has been very vocal in parliament, criticising the Government over the introduction of Universal Credit, and calling for mayors to have greater influence and powers over managing its rollout.

Change into Action – led by Metro Mayor of the West Midlands, Andy Street, and supported by Birmingham City Council, is an 'alternative giving campaign' launched in December 2017 to tackle issues around rough sleepers. Piloting initially in Birmingham, the project aims is to focus support into specialist charities and street teams already working to change the circumstances of rough sleepers. The project is promoted via an interactive information campaign around the city, on social media, including local businesses, and allows members of the public to pinpoint rough sleepers to be met by street teams and can opt to be kept up to date with what happens next. This multi-agency approach is spearheaded by the Mayor's Homelessness Task Force[42].

The project works in tandem with the civic Mayor of Liverpool's 'Routes out of Rough Sleeping Task Group' established in 2017 and which recently published the most in-depth study of rough sleeping in the UK[43].

There are high hopes for Metro Mayors to revitalise and regenerate 'forgotten areas' of the country, and part of that process will rely heavily on their relationship with the voluntary and community sector in partnership with the public and private sectors. Social commentators have called for Metro Mayors to:

[41] www.changeintoaction.org.uk/
[42] https://liverpool.gov.uk/roughsleepingreport

- develop tangible and sustained collaboration with independent funders and local funders, such as Community Foundations, as well as other housing and private-sector organisations (IPPR North, 2017).
- use their soft powers to 'showcase need, convey social aspirations and convene opportunities for a new reciprocity and giving' as a means to help to 'reframe business as a mechanism to combat social need' (McInroy, 2017).

8.4. Lord Mayors

Lord Mayor of London

The Lord Mayor of London has historically had a philanthropic role to play in the capital. The role carries two main charitable arms: the City of London Corporation's charity Bridge House Estates (the grant-making arm of which is **City Bridge Trust**); and the **Lord Mayor's Appeal**. City Bridge Trust, operating since 1995, has awarded over 7,000 grants totalling £3,333 million over the last 20 years and has been a major supporter of place-based giving in the capital. The Lord Mayor's Appeal had an income of £1.8 million in 2016 and spent £2.1 million, and has just announced a new strategy for 2018–2020 with the aim to create *A Better City for All* and help 1 million people thrive. The new strategy, based on needs research with over 200 organisations, charities, experts and thought leaders, has four key pillars to build a City that is Inclusive, Healthy, Skilled and Fair and will back 3 charities over 3 years (*Place2Be, OnSide Youth Zones* and *Samaritans*). Work with existing initiatives, *Power of Diversity, This is Me* and *City Giving Day* will also continue.

Lord Mayor of Manchester

The Lord Mayor of Manchester's Charity Appeal Trust changed its name in 2011 to the *We Love MCR Charity,* adopting the style of the successful *I Love Manchester* campaign, which followed the disturbances in the city in 2011 and became a symbol for positive action by residents and local businesses. The Charity gave grants of over £50,000 in 2016/17. In the wake of the Manchester Arena bombing in 2017, the *We Love MCR Emergency Fund* was set up as a separate fund to help victims and families after the attack and raised over £21 million; a *Manchester Memorial Fund* raised over £330,000 for a permanent memorial to the victims.

8.5. City Mayors - Mayor of Bristol

The Mayor's Fund for Bristol is managed by Quartet Community Foundation, which has great ambitions for it to take after the New York Mayor's Fund and to instigate other projects as London's Mayor's has in a City Giving Day.

> *When we had the first directly-elected Mayor of Bristol, George Ferguson, he was someone who brought back the High Sheriff's Fund with us for good causes across the area. George Ferguson was someone with a very philanthropic background, and he thought that Bristol ought to have a Mayor's Fund in the style of the New York model and many other areas around the world where it's recognised as a way to provide sustainable funding whoever is in post, although typically it would have a 1-year focus on any particular issue according to the Mayor's priorities at the time… I would like the Mayor's Fund to be more like the New York model where it's not seen as the project of a particular Mayor, but something that all Mayors are proud to have and to use just like the High Sheriffs do, but we've got a little way to go to get to that sort of non-partisan way of looking at it.* ***Sue Turner, CEO Quartet Community Foundation***

> *We're looking at setting up a Bristol Giving Day, like the City Giving Day that the Lord Mayor of London has, so that local businesses can participate in civil society – not just by raising funds for the big national charities but can think about what they can do for small, local ones that have no fundraising department and where a thousand pounds would be absolutely life-changing. But we want to do things a bit differently, so the Lord Mayor won't prescribe where the money should go to except local good causes, and we can link them up with those, or if they just want to give to the city then they can give into the City Funds.* ***Sue Turner, CEO Quartet Community Foundation***

Mayor's Fund for Bristol – overseen by the current city Mayor, Marvin Rees, the endowed fund is managed by the Quartet Community Foundation. The Fund will focus on homelessness for the next four years, in line with the priorities of the newly established City Office. The Mayor also supports the Rough Sleeping Partnership's *Safer off the Streets* crowd-funding campaign for night shelters in the city, which has raised over £50,000 to date. The Rough Sleeping Partnership (RSP) includes Avon & Somerset Police and the Golden Key Programme, as well as St Mungo's, The Julian Trust, Caring in Bristol and Crisis Centre Ministries. The RSP's work includes *Bristol Street Aware* for local businesses, and developing a *One City* approach to tackling homelessness and rough sleeping. The Mayor's *One City Plan* will bring together private, public and philanthropic sector players (including a strategic partnership with Bristol and Bath Regional Capital and Quartet Community Foundation) to work together on shared strategic priorities for Bristol. This will include the setting up of *City Funds* to mobilise local investment into priority areas, such as housing and employment, as part of the City Council's inclusive growth strategy. The Mayor's Fund will continue for now, although donors are being given the option to switch their donations to the new City Funds.

Other cities' mayors have also set up funds, for example, The Mayor's Hope Fund in Liverpool is a registered charity set up to help those 'suffering in poverty' in Liverpool and encourages people to sign up to give just £1 a week through JustGiving. The Fund had an income of £46,000 and spent nearly £31,000 in 2017. Besides this, many local Mayors raise funds for charity via the general public and local businesses, from the Mayors' Community Trust Fund of Brentwood, to the Mayor of Much Wenlock's Garden Party fund.

Nevertheless there has been some criticism that some Mayor's Funds are not very transparent in how they are structured and how much is raised. Additionally it has been noted that many Mayor's Funds are currently narrow in focus, tackling specific issues and beneficiary groups with mainly public money, rather than bringing together a wider pool of philanthropy to tackle issues more strategically (Davies, 2017).

> *Local Mayor's Funds also have an appeal but we are finding from work with place-based giving schemes that the transparency around how they happen, are structured and how much they raise is not well understood. It is something we would like to understand more about, with the aim that place-based giving schemes partner with them as they provide a brilliant local solution.* ***Cheryl Chapman, Head of Philanthropy Engagement, City Bridge Trust***

> *If you said to me, as a Community Foundation, that tomorrow all your money is going to be coming from a huge Mayor's Fund which the Mayor will decide how to spend, I would say no thank you very much. I'd rather stay as we are with all of our different funds (around 250 currently) where some are Mayor's Funds but others are discretionary and influenced heavily by local people and their desires and needs.* ***Sue Turner, CEO Quartet Community Foundation***

8.6. Mayoral involvement with place-based schemes

> *We think that there is a strong role for combined authorities and Mayors in the agenda for solving poverty.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

Mayors, by definition, work in place, and often work in partnership. Some of these partnerships are particularly noteworthy in the context of this report.

The Citizenship and Integration Initiative – using a model inspired by similar initiatives in the USA, but for the first time at scale in London, in 2017, the Mayor of London, Sadiq Khan announced a new partnership with the Trust for London and Unbound Philanthropy to ensure that Londoners of all backgrounds have meaningful opportunities to participate in the life of the city and the decisions that affect them. The Fund has now been joined by independent funders the Paul Hamlyn Foundation, City Bridge Trust and the Pears Foundation, bringing the total available to £0.5m for the first two years. The GLA have made an investment at an equivalent level into their new Social Integration Team. The first round of grants were allocated to: Migrants Organise, Citizens UK, Coram Children's Legal Centre and Just for Kids Law to enable them to second a staff member into the new Social Integration Team at the GLA to influence and innovate in decision-making at City Hall level.

Several place-based giving schemes have (or have had) direct involvement with Mayors. In London, Love Kingston, Sutton Giving, The Kensington & Chelsea Foundation, Islington Giving, and Camden Giving have all benefitted from relationships with their local mayors. The Kensington & Chelsea Foundation were the local mayor's charity in 2016, and were likewise the chosen charity prior to that. It was described as a positive experience which raised an extra £15,000-£20,000 for them. For Islington Giving, it was a wholly positive experience from which they learned how to do it even better next time.

> *Islington Giving was the Mayor's Charity in 2014. He raised £28,000 and we received over £14,000 as he chose 2 charities for his Mayoral year. Being the Mayor's charity gave Islington Giving profile in the borough. He attended our events and held fundraising dinners. It was the first time that we had worked with a mayor, so we learned a great deal. We're talking to the Deputy Mayor about becoming the Mayor's charity in 2018 or 2019 as it's such a good opportunity to raise our profile and knowledge of Islington's Giving's work.* ***Kristina Glenn, Director Cripplegate Foundation / Islington Giving***
>
> *Being clear about what you want to achieve – for us profile and new connections – is a priority and a recognition of the investment of time that being the Mayor's charity takes. We developed and organised fundraising events as there was little capacity in the Mayor's office.* ***Kristina Glenn, Director Cripplegate Foundation / Islington Giving***

Love Kingston is the local mayor's charity this year. So far, the association has raised around £70,000, which is half of their annual budget. Love Kingston also talked about the intangible benefits of association with the mayor, such as the mayor's social capital and influence, raising awareness and being able to make things happen in the borough by working through the council and speaking to the right people[43]. For Sutton Giving, things haven't quite materialised yet, despite putting in a lot of effort.

> *We were approached here in Sutton by a Mayor who was coming to the end of his term. He thought that there was value in looking at how both the selection of mayoral charities was made and how fundraising initiatives were managed and run to add some process that could be utilised on an annual basis. Discussions were held with the councillor connected to the voluntary sector, who was in agreement with such an approach. The paper was taken to Democratic Services where it was discussed but the approach was rejected.*
>
> *Members considered the option and were of the view that, on balance, the advantages of integrating the Mayor's Charity into Sutton Giving are outweighed by the disadvantages of doing so. Their reasoning behind this is as follows:*
>
> - *It would break the link between the Mayor and their specific choice of charity*
> - *Mayors often choose small charities, and are unlikely to want funding to be awarded to bigger, more organised ones*
> - *A formal link would make the process more bureaucratic and complex to administer*
> - *There are questions as to who would ultimately decide which charity obtains the funding. Mayors receive a lot of support from volunteers of their charities to help at events, for example with collections, etc. and, if the link were broken, there would not be those volunteers available.*
>
> *The concerns raised are solvable and discussions are starting with the department.* ***Jenny O'Neill, Development Manager, Sutton Giving***

Camden Giving are about to embark on a new association with the local mayor of a slightly different nature, whereby the Director of Camden Giving will become the mayor's official escort for the year; while Southwark Giving are hoping to develop a relationship with the mayor after partnering with him in the local Business Excellence Awards.

> *The Mayor won't fundraise for Camden Giving, but will take me to events that will be useful for Camden Giving. As a new charity, I think it will be useful for us to make valuable connections. We are gently pushing to become the Mayor's charity indefinitely, with the fundraising focus changing with each Mayor.* ***Natasha Friend, Director, Camden Giving***

[43] Information relayed via Cheryl Chapman, Head of Philanthropy Engagement, City Bridge Trust.

We recently partnered with the first Southwark Business Excellence Awards as a charity partner alongside the local Mayor and their charities. Southwark Giving would like this to be a seed that grows into a relationship, in whatever form it takes, with the Mayor and their community investment work. ***Helen Atwood, Head of Southwark Giving***

Other place-based schemes outside of London have had similarly mixed experiences. LoveBrum have successfully worked with the Metro Mayor of the West Midlands on homelessness campaigns, while LCVS have worked with Liverpool City Mayor on several ventures and have learned to be bolder in their relationship.

We have worked with the Mayor for the West Midlands, Andy Street on homelessness by cross-promoting both our homelessness campaign, Bags for Brummies, and his alternative giving scheme, Change into Action. ***Kate Grantham, LoveBrum Office Administrator***

We've worked with the Mayor's office on a number of things. We're part of the Inclusive Cities Taskgroup, and took part in the Mayoral Roundtable discussions on this. The Mayor chairs the local Health and Wellbeing Board, which we work closely with. Last year I was involved with the Mayor's Taskforce on rough sleeping. It's a really healthy relationship at the moment. I think we've been a bit bolder with them in the last 12 months about what we stand for, and what we can or can't do for them, so that helps. Because in the past there's always been that perception that all the voluntary sector wants is their money, but we've been very clear right from the beginning that that's not what we're about – that we want to see how we can help first. Then when they see that if they do give us a little bit of money we can double or treble it then they are fine with that. ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

Others have had more indirect support, like the Rainbow Fund and Forever Manchester, and the East End Community Foundation, which works more strategically with their local council.

While the local Mayor isn't directly involved the current Mayor is very supportive of the LGBT+ community in Brighton & Hove. The Mayor always attends Pride and one of our local LGBT+ fundraising organisations (Bear Patrol) has involved the Mayor in their fundraising. ***Chris Gull, Chair The Rainbow Fund, Brighton***

After the arena bombing atrocity in May 2017, a separate Emergency Fund was set up by the Lord Mayor's charity, and we didn't have the skillset to operate that kind of fund, but we have a poet in residence, Tony Walsh, who wrote a poem for us 6 years ago called 'This is the place' and that was used at the vigil and went global and we raised around £200,000 off the back of that, which we split with the Emergency Fund. But there's no collaboration there. ***Nick Massey, CEO Forever Manchester***

We're part of the council's 'Voluntary Sector Strategy Board', so we're helping them with that plan. Trying to streamline the process for everyone and create a coordinated approach to giving and volunteering. That's where Tower Hamlets Giving comes in, and it's written into the strategy now. Part of our role is to help the council to re-engage with the community, including local businesses, after the damage done to relationships under the last administration. It's a partnership relationship. ***Tracey Walsh, Chief Executive East End Community Foundation***

There were also examples of where place-based schemes had approached the local mayor to work together and this hadn't been successful, e.g. Forever Manchester and Leeds Community Foundation.

A traditional approach for UK Community Foundations is to approach other funds and say 'can we manage your fund more economically than you are currently managing it?' For five years we went to the Lord Mayor's Fund in Manchester to suggest this. At one stage they had half a million pounds surplus and we offered to create a separate fund and we can match it and create an endowment and it got vetoed at the last minute by one councillor. ***Nick Massey, CEO Forever Manchester***

We don't have any involvement with the local Mayor currently. To be honest it's quite frustrating that we don't. They have their annual charity and fundraising ball, and we have tried to get in the door but failed so far. I think you probably need more of a track record to be able to do that. The Mayor's charity tends to be very well known. Perhaps in another year or so... ***Kate Hainsworth, CEO, Leeds Community Foundation***

The last time I spoke to the Chief Exec of Manchester city council he said to me: 'You're Greater Manchester, we're Manchester', so I don't think there are any future opportunities to work together. Essentially the function of the Mayor is to support grassroots community groups and our original conversation was: 'Why have we got two separate funds trying to fundraise for the same thing?' But they wanted their independence. I find it frustrating as we have much more experience of grant-making. ***Nick Massey, CEO Forever Manchester***

From the interviews in this report it was clear that one of the main factors for success or otherwise of these collaborations with mayors is the personality and politics of the mayor and his or her administration.

> *We had a really positive relationship with Tower Hamlets council before the previous administration, then under the previous administration we pulled away as we felt we couldn't work with that particular Mayor. But now we've got a new Mayor in post we're trying to reinstate that good relationship.* ***Tracey Walsh, Chief Executive East End Community Foundation***

> *It's partly down to the personality of the current Mayor – he's all about being more collegiate, working together more, and he's certainly led from the front on that.* ***Colin Heaney, Co-CEO/Director of Development and Programmes LCVS***

8.7. High Sheriffs and Lord Lieutenants

High Sheriffs 'play an increasingly active and supportive role within their Counties…lending encouragement to …voluntary sector organisations involved in crime reduction and social cohesion.'[44] They have non-partisan convening power to bring people round tables in the same way that local Mayors do, and a high proportion of them also raise funds (many with Community Foundations) and give grants to local community projects.

> *High Sheriffs used to have a thing called Legal Sunday, which was the kick-off to the legal year and all the local law firms would go along, and they would have a service in Bristol Cathedral. This year they will combine this with Bristol Giving Day to celebrate and thank the legal community for what they do in Bristol civic and philanthropic life.* ***Sue Turner, CEO Quartet Community Foundation***

8.8. Concluding remarks on civic philanthropy

As a recent report on the role of mayors in civic philanthropy noted: 'There has long been a relationship between the role of local mayors and that of civic philanthropists…In some cases, they are even the same people…In most cases, however, while the mayor themselves is not a major donor, they can play an enormously important role by having a clear vision for the role that philanthropy can play and by implementing dedicated strategies to encourage giving in support of their civic region.' (Davies, 2017)

Davies further concludes that mayors should: develop a clear narrative about the role of philanthropy in their jurisdiction; take a convening role; establish a Mayor's Fund; appoint a philanthropy liaison; and publish a philanthropy strategy. The current research makes it clear that there is a role for collaboration with place-based schemes in all of these mayoral functions.

9. The future of place-based giving schemes

One of the aims of this research was to investigate whether more place-based giving is possible and desirable in England. Among interviewees, there was a strong desire to see more place-based giving being developed, as long as that development is done sensitively and place-based schemes aren't seen as a 'magic bullet' with which to solve all the country's ills.

> *Other cities could do this. There are so many people out there doing good things with charity and community groups, but people just don't know these projects exist so they give to a bigger charity. A local giving scheme means that you can give to a whole range of projects very, very close to you.* ***Kate Grantham, LoveBrum Office Administrator***

> *I would certainly support other foundations such as ours setting up in a place where there is no Community Foundation and where there is no other hub for the community, as long as it's very clear what that organisation is set up to do.* ***Susan Dolton, Director, The K&C Foundation***

> *It's just another tool in the toolbox, and should be just that. It's really about the development of people thinking differently. We try to push ours as 'giving local, staying local' so people recognise the need in their locale.* ***Giving for Thurrock***

One interviewee sounded a note of caution that the marketplace could quickly become overcrowded if too many new schemes were developed with overlapping missions.

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[44] http://www.highsheriffs.com/Duties.htm

> *I think there's a possibility that 'place-based' could soon become a very crowded market, with Community Foundations, the London borough schemes, and, for example, locally, John Lyon's Charity are setting up a Young People's Kensington & Chelsea Foundation[45]; and we see that has the potential to cause some confusion.* ***Susan Dolton, Director, The K&C Foundation***

The vast majority felt very strongly, however, that there isn't and shouldn't be a single model for place-based giving because by its very definition it needs to be tailored to the particular place it is based in. This means that each scheme has slightly different needs.

> *It's not a one-size-fits-all kind of thing.* ***Giving for Thurrock***

> *Islington Giving exists because it's in Islington. And I know that other giving schemes have sprung up but essentially I don't think you can just transplant little Islington Givings everywhere.* ***Rob Williamson, CEO Community Foundation Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations***

> *What makes each giving scheme unique to its area is the priorities and funding themes, which should be picked by the leaders of each scheme. Every place has its own needs and gaps. Every area has a different profile.* ***Tracey Walsh, Chief Executive East End Community Foundation***

> *The whole essence of place-based giving schemes is that they are very local and very person-centred and those things are really hard to just plant in.* ***Helen Kersley, Programme Director Cripplegate Foundation, lead on Islington Giving***

> *The point of place-based giving is that it's horses for courses – each place, while having some things in common, actually needs to be able to develop its own solution, and that's why we're all unique.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

> *I find the London Funders collaboration is very fruitful. The beauty of the London place-based giving schemes is that we're not in competition with each other. We can learn from each other but actually we're all very different, probably because each of our places has different needs, and I think that's really healthy. I'm not sure uniformity is the answer.* ***Susan Dolton, Director, The K&C Foundation***

> *I think it's interesting that giving schemes are being held up as THE models of place-based schemes. You could have place-based schemes that don't have anything to do with community giving. There are other ways to look at place-based social action, which are more like community development and community organising, and they should be factored in.* ***Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab***

> *What we're doing with Wellbeing Exeter - we're now being seen as a template which could be rolled out across the whole of Devon. The nettle that's going to have to be grasped is that what works in Exeter may very well not work in Barnstaple.* ***Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter***

As many have commented, the recent referendum on 'Brexit' has shown that place matters very much to people in Britain, and the schemes outlined in this report have shown how a sense of place can be utilised to the greater good. While place-based charitable initiatives are not a new concept, a renaissance of thinking around place-based giving clearly has potential benefits for all.

[45] John Lyon's Charity has established eight Young People's Foundations to date in Barnet, Brent, Camden, Ealing, Hammersmith & Fulham, Harrow, Kensington & Chelsea and Westminster. These are co-funded by City Bridge Trust. John Lyon's Charity were also involved in setting up the Children and Young People's Fund (Phase 1 & 2) after the Grenfell Tower fire.

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- Helen Atwood, Head of Southwark Giving
- Susan Dolton, Director, The Kensington & Chelsea Foundation
- Jake Ferguson, CEO, Hackney CVS, Hackney Giving
- Fabian French, CEO UKCF
- Jan Garrill, CEO Two Ridings Community Foundation
- Jonathan Gibson, Community Development Officer JRF, Hartlepool Action Lab
- Kate Grantham, LoveBrum Office Administrator
- Chris Gull, Chair The Rainbow Fund, Brighton
- Kate Hainsworth, CEO, Leeds Community Foundation
- Sam Hawksley, Development Lead, Lewisham Local
- Colin Heaney, Co-CEO/Director of Development and Programmes LCVS
- Kristina Jackson, CEO Thurrock CVS
- Helen Kersley, Programme Director Cripplegate Foundation, lead on Islington Giving
- Nick Massey, CEO Forever Manchester
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- Clare Thomas, London's Giving, London Funders
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- Tracey Walsh, Chief Executive East End Community Foundation
- Jo Wells, Director Blagrave Trust
- Martha Wilkinson, CEO Devon Community Foundation, Programme Manager Wellbeing Exeter
- Rob Williamson, CEO Community Foundation Tyne & Wear and Northumberland, Vice Chair of UK Community Foundations

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Location of case studies
Tyne & Wear & Northumberland
Community Foundation Tyne & Wear and Northumberland
Hartlepool
Hartlepool Action Lab
Harrogate
The Local Fund for Harrogate
Leeds
The Leeds Fund
Liverpool
LCVS
Birmingham
LoveBrum
Islington
Islington Giving
Thurrock
Giving for Thurrock
Kensington & Chelsea
The Kensington & Chelsea Foundation
Hackney
Hackney Giving
Lewisham
Lewisham Local
Brighton
The Rainbow Fund
Exeter
Wellbeing Exeter