

Committee	Dated:
City Bridge Trust	25 th July 2019
Subject: Strategic Direction for Impact and Learning	Public
Report of: Chief Grants Officer & Director of City Bridge Trust (CGO)	For Decision
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Summary

This paper sets out the strategic direction for your Impact and Learning function, comprising a proposed vision, goals and principles. Subject to approval of the strategic direction, an implementation plan will be presented to this Committee in September 2019.

Over the next 4 years, the Impact and Learning Strategy will drive forward the Trust's use of evidence and learning across all its work including grant-making, 'funder plus', philanthropy and social investment, fulfilling the aspiration set out in Bridging Divides that we will '*seek to learn what works, what our best contribution can be, and how we should adapt our strategy*'.

The strategy will ensure that our work to reduce inequalities and foster thriving communities in London has the greatest impact. We will share what we learn, using findings not only to improve what we do, but to help and influence others. The strategy provides us with opportunities to use our data to its full potential and to create a culture which values and champions learning, internally, among our grantees and in the wider sector.

Recommendation

Members are asked to:

- Approve the strategic direction for City Bridge Trust's approach to Impact and Learning, set out in Appendix 1.

Background

1. Launched in 2018, *Bridging Divides* aspires to be a strategy that 'learns and adapts' to meet the changing needs of Londoners.
2. City Bridge Trust (CBT) has well-established systems for gathering and analysing data from application and monitoring forms as well as grantee visits. The Trust provides capacity building support to assist grantees improve their monitoring and evaluation and we frequently commission evaluations and research, for

example the Refuge / NSPCC research project ([Meeting the needs of children living with domestic violence in London](#)).

3. We wish to build on this strong foundation and adopt a more purposeful approach to impact and learning. Officers recommend an approach which makes full use of the data, relationships and learning the Trust gathers or has access to. We propose a strategic direction that will enable CBT to be dynamic over time, responding to the range of factors influencing the lives of disadvantaged Londoners, and using the resources available to us as effectively as possible to address inequalities.
4. The strategic direction is consistent with emerging best practice in the Trust and Foundation sector. Funders are increasingly exploring new ways of operating, such as developing shared approaches to monitoring (<https://www.ivar.org.uk/publication/new-principles-for-grant-reporting/>) or using digital platforms to receive a range of data updates from grantees.
5. Members approved the creation of a dedicated Impact and Learning Function as part of Bridging Divides. In January 2019, a Head of Impact and Learning role was fully staffed as a job share. The function is supported by a Learning Partner, (Renaissi) and consultants who deliver compliance and unannounced visits. A Data Analyst role will be recruited in the next few months.

Preparations and Analysis

6. The strategic direction in appendix 1 is based on a review of CBT's current practice, the work of other Foundations, grantee feedback, and engagement with several key stakeholders. Since January 2019, the Heads of Impact and Learning have:
 - a) mapped current CBT learning and impact activities;
 - b) consulted staff members across the Trust's grant making, philanthropy and social investment teams about their impact and learning needs.
 - c) engaged with City of London Corporation's Strategy and Performance team about the developing strategy;
 - d) surveyed current grantees seeking their views on our monitoring methods and how they would like to tell us about their impact in future; (we received input from 155 organisations).
 - e) examined the work of other Funders through meetings, review of materials and seminars;
 - f) analysed the Trust's readiness for adopting organisational learning and evaluation practices, across culture, leadership, systems, communication, teams and evaluation; and,
 - g) worked with our Learning Partner, Renaissi, to develop Theories of Change, review our values, the language we use and our planned use of external data sets.

7. In developing the strategic direction, your officers are mindful of the following:
- a) that the impact and learning strategy must be situated in the overall mission and vision of Bridging Divides;
 - b) that work reflects CBT's operations across multiple thematic areas and has a wealth of data available;
 - c) that an Impact and Learning strategy needs to focus our learning and help us prioritise what we will focus on as well as helping us decide what we will not;
 - d) that there is a power imbalance between funder and grantees and that this has an impact on the way we develop shared approaches to learning;
 - e) that becoming a learning organisation can require a significant cultural shift which should not be underestimated (we believe this needs to be viewed as a journey which will require time and commitment from the highest levels to achieve);
 - f) that we are most likely to be effective if we commit to open and honest communication of what we want to achieve with our impact and learning strategy and our progress (both externally and internally);
 - g) that this must be an organisation wide strategy. While the Impact and Learning team will drive its development and manage its implementation, the whole of CBT will need to be involved in impact and learning activities.

Next steps

8. Subject to Member approval of the proposed strategic direction, officers will develop an implementation plan for consideration at your September meeting. This will address the schedule of activities, resources, risks and communications needed to deliver the strategy. Work on the implementation plan would be based on continued consultation with Trust staff, other funders and grantees to create a strategy that meets all stakeholder needs. Officers would continue to engage the City Corporation's Corporate Strategy and Performance team to ensure there is synergy between the plans for impact and learning and the Trustee's wider KPIs.

Appendix 1: Strategic Direction for Impact and Learning

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Appendix 1:

Impact and Learning Strategic Direction 2019 to 2023

Working definitions	
Impact	The long-term difference we make
Learning organisation	An organisation which ' <i>actively creates spaces and opportunities for knowledge and intelligence to inform and shape its day-today practices as well as its future direction, and embeds these within its culture</i> ' (IVAR)
Evidence	Anything presented to support decision making. This could be data collected by us or by others and can include qualitative, quantitative and reflective materials.
Partners	The organisations we fund.

Our vision for impact and learning:

To use evidence and learning as forces to drive our work to reduce inequalities and foster thriving communities in London and beyond.

Our goals:

1. We have a strategic approach to impact and learning which guides the Bridging Divides strategy across all its activities and across all our assets and resources, monetary and otherwise. Our approach is dynamic and can change over time.

2. We use evidence and learning to shape our work: We adapt our approach and make decisions at all levels in response to relevant and timely evidence and learning insights. This includes a broad range of data, knowledge and information generated and gathered systematically from inside and outside the organisation. We have clear internal data standards and are aware of the limitations of the data we hold and its appropriate use.

3. We understand the impact we make: We are clear about the difference we hope to make and how we aim to bring this about, recognising that often this is not a linear process. We are open about how we measure the difference we make and honest about the difference we claim.

4. We share, influence and work with others: We share our findings publicly to influence approaches to reducing inequalities and fostering thriving communities in London. We know we don't have all the answers so we collaborate and create spaces where our partners, service users and other funders can be experts and share knowledge and learning about what works, as well as lessons learned from failures.

5. We are a learning organisation: We actively create spaces and opportunities for knowledge and data to inform and shape our day-to-day practices as well as our future direction and embed these within our culture. All CBT team and Committee Members are encouraged to ask, 'could we do it better?' and to trial new approaches, reflecting on and sharing what works and doesn't work.

6. We have an inclusive approach to impact and learning: We seek and include the needs and opinions of our partners and people they support in our approach.

Our principles: questions to ask before we start any impact and learning activity:

- a) Are we clear about what we want to know?
- b) What will we do with the findings and how will we communicate this to our partners?
- c) Is this a proportionate use of resource (for us and our partners)?
- d) Are our expectations of partners fair and clear to them?
- e) How will we ensure we are seeking views from a diverse field?
- f) Is this the best method of finding out what we want to know?
- g) Will this help us achieve our organisational vision?
- h) What is the benefit and who accrues it?
- i) Are we measuring the right things and at the right time for our partners?