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| Committee   | Dated:                     |
| City Bridge Trust Committee   | 25 <sup>th</sup> July 2019 |
| Subject:<br>Review of Bridging Divides values   | Public                     |
| Report of:<br>Chief Grants Officer & Director of City Bridge Trust (CGO)                          | For Decision               |
| Report author:<br>Ruth Feder / Jemma Grieve Combes Head of Impact and Learning, City Bridge Trust |                            |

### **Summary**

This paper summarises a review of Bridging Divides' Values, including research, interviews and surveys with Members and officers conducted by Bridging Divides' Learning Partner, Renaisi in June 2019 and final recommendations for changes made by your officers.

Bridging Divides is a values-led strategy, its five values developed with Londoners, external and internal stakeholders. While these values and the aspiration to be a values-led funder have support among CBT staff members and committee Members, there is a lack of consensus on how to implement the values so that they are a 'golden thread' which inform all aspects of CBT's work. The research shows that the values would benefit from clarifying and reframing.

Your officers considered Renaisi's recommendations, consulted with the CBT team and further refined these, to arrive at five recommended new values. This decision-making process, current and the new values are summarised in table 1.

### **Recommendation**

Members are asked to:

- a) approve the recommended changes to the Bridging Divides values.

### **Background**

1. There was a clear desire expressed through verbal and written feedback from stakeholders between August and December 2016, including our elected Members and City Bridge Trust staff, that the Trust needed to commit to addressing the power imbalances that exist between charitable funders and those they fund, and to move from being a programme-led funder to a relational and values-led funder.
2. Considerable consultation with Londoners, internal and external stakeholders resulted in five values, approved as part of the Bridging Divides Strategy. It

was the intention that the five approved values would run through every aspect of the Trust's work, in terms of its governance, leadership, funding practices, partnerships, learning etc. – driving forward key improvements throughout the organisation. Another ambition was using the values to identify organisations to partner with.

3. As part of Bridging Divides' ambition to be 'a strategy that learns and adapts', and following a competitive tendering process, in February 2018, Renaisi was appointed as learning partner to Bridging Divides, to act as a critical friend and help CBT learn from its work in real time.
4. Following the launch and implementation of Bridging Divides, it was felt that the values should be revisited, so Renaisi was commissioned to explore:
  - a) What do the values mean in practice?
  - b) What is the Trust currently doing? How could it do this better?
  - c) Where are the gaps?
  - d) What else could the Trust do?

## **Research methods**

5. Renaisi addressed these questions using the following methods:
  - a) Interviews with nine people from across City Bridge Trust, including the Senior Leadership Team, a Committee Member and Funding Managers, to explore the values in depth.
  - b) Desk-based research to identify how other funders use their values.
  - c) Two short surveys completed by staff and Committee Members, with 19 and seven respondents respectively.
6. The research is incorporated into Renaisi's Review (appendix 1), and a summary of the quantitative results of the surveys is an appendix to the Review.
7. We are grateful to all the City Bridge Trust staff and Committee Members who contributed to this research.

## **Findings**

8. During the research process it became clear that the values were not clearly understood by all or being implemented consistently and would benefit from clarifying and reframing before implementation strategies are developed.
9. As a result, the report focusses on how the values are currently articulated and challenges identified by research participants, options for how to implement the values and recommendations about how the values may be framed differently to help with their implementation.
10. The results of Renaisi's research show the commitment of CBT Committee Members and staff members to having organisational values, the sense of

motivation both groups feel about being a values-led funder and particularly the extent to which Members use the current values in their decision making.

11. Most research participants felt that our values should inform all our activities and processes, and should be adopted by all committee and staff members, summarised by a survey respondent:

*“If we state that we are values led funder, then we need to try to work through the application of those values across all aspects of our practice.”*

## Conclusions

12.

- a) We should be a values-led funder (all 7 surveyed Members and all but 1 surveyed member of staff said this motivated them in their role)
- b) our values should run through every part of the Trust’s work – acting as a ‘golden thread’, rather than applied only to what we fund or how we fund (10 out of 14 staff members surveyed agreed)
- c) the values should be clearly articulated, simple, memorable and easy to understand
- d) they should be broad enough to be applied generally
- e) they should be framed as statements of behaviour, to guide both individual and institutional actions.

## Summary of recommended changes

Table 1

| Current value   | Recommended value                         | Explanation   |
|---|---|---|
| Inclusion and representation                                      | <b>We are inclusive</b>                   | Of the two principles, ‘inclusive’ is more achievable, and most widely applicable to the variety of settings in which your officers operate.  |
| Care for the environment  | <b>We are environmentally responsible</b> | ‘Care for’ was felt to be too weak, in light of the climate crisis and the <a href="#">unprecedented call to funders from scientists</a> to help.<br><br>“Responsible” suggests shared accountability so can be applied across team, grantees and committee Members |
| Collaborative working with Londoners, communities and all sectors | <b>We are collaborative</b>               | ‘Collaborative’ is simpler and more memorable   |

| Current value                           | Recommended value   | Explanation  |
|---|---|--|
| Being adaptive, creative and purposeful | <p><b>We are adaptive</b></p><br><br><br><br><p><b>We are progressive</b></p> | <p>‘Adaptive’, most clearly aligns with the principles behind <i>Bridging Divides</i> and is most clearly applicable to how you and your officers operate.</p><br><br><br><br><p>‘Progressive’ captures both ‘creative’ and ‘purposeful’, as well as an ambition to seek new ways of working in response to needs and gaps as they arise</p> |
| Early action                            | <b>Remove this as a value</b>   | While this can be an important funding principle in certain contexts, overall it is not a useful guide to how we operate as a funder.  |

### Next steps

13. Subject to Member approval of the proposed changes to values, officers will work with Renaisi to develop how the values should be used to guide how the Trust operates internally and externally.
14. Copies of Renaisi’s desk research key findings and PowerPoint presentation can be made available on request.

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