

Committee	Dated:
City Bridge Trust Committee	11 th September 2019
Subject: Review of 2018 / 19 Learning Visits	Public
Report of: Chief Grants Officer & Director of City Bridge Trust (CGO)	For information
Report author: Ruth Feder / Jemma Grieve Combes Head of Impact and Learning, City Bridge Trust	

Summary

Over the summer, your officers commissioned CBT's learning partner, Renaisi, to analyse and draw out learning from the 2018/19 learning visit reports. We also asked them to make recommendations for changes to the learning visit approach that would enable the Trust to better generate learning in line with the impact and learning strategy.

The report below summarises the findings from Renaisi's report. It provides examples of benefits to which the grant has contributed, learning identified by grantees and Funding Managers, and areas identified for total assets support. Finally, there are recommendations for the Heads of Impact and Learning, to capitalise on the opportunities for learning and connecting through learning visits and improve the quality of the learning generated. Officers will consider these as part of the wider impact and learning strategy implementation to ensure we take a more strategic approach to impact and learning.

Recommendation

Members are asked to:

- Receive this report and note its contents.

Background

1. Each year, CBT Funding Managers make 40 learning visits to funded organisations to understand better the work that grantees are doing and to identify successes, challenges and trends to shape and inform the Trust's wider work. These visits are also to meet the expressed need of grantees for face to face contact with CBT. Upcoming learning visit details are sent to CBT Committee Members monthly so they can choose to attend and see first-hand the work of funded organisations.

2. The annual selection of grantees to visit is made to cover a range of thematic and geographical areas – including grantees from the Trust’s main grants under Investing in Londoners and Bridging Divides.¹
3. Funding Managers have reported enjoying the time spent on visits, but they have also reported not finding the visits helpful in their current format, The recent grantee survey showed that funded organisations are keen for CBT to visit their organisations, but some grantees have reported that they are unclear about the purpose of the visits. During April 2018, when in post as Chair, Alison Gowman suggested improving learning visit reports to enable easier identification of themes across organisations.
4. Two learning visit reports are shared with Committee at each meeting, but the learning generated from the visits has not been analysed regularly.

Findings – impact for grantees and beneficiaries

5. Individual visits are rich in learning and provide Funding Managers and grantees with an opportunity to connect, gain and give support. Written reports provide a record of this learning which can be shared with other members of the team and Committee members. However, when analysing the learning reports, it was difficult for Renaisi to identify many overarching themes due to differences in the way the reports were completed, the fact that visits took place at different points on the funding journey, and the variety of projects. Instead they highlighted types of impact for grantees and provided examples of these, as well as examples of benefits for beneficiaries; summarised in Tables 1 and 2:

Table 1 – Impact for grantees

Type of impact	Example
Improvement in capacity to run their project	Sustain felt that they could run their Capital Growth project in a more effective way since receiving the CBT grant.
Development of new partnerships	Independent Living Agency felt having time to develop new partnerships helped them provide more services for disabled adults
Being recognised as a trusted organisation within a certain community	Shpresa felt that the grant helped them to be recognised as a trusted organisation within the Albanian-speaking community.

¹ It excludes access audits, eco audits, anniversary programme and capital grants but may include some Stepping Stones grants and strategic initiatives.

The opportunity to expand their services	Open Door, Young People’s Consultation Service said that the CBT funding allowed them to implement their delivery model in a different place with a different population.
The opportunity to refine new ways of working	Neighbours in Poplar felt the grant enabled them to expand the services offered, develop new partnerships as well as provide new programmes offering a more holistic service.

Table 2 – Examples of impact on beneficiaries

Name of organisation	Example of impact on beneficiaries
Age UK Wandsworth	After accessing the funded service, 41% of respondents reported that their confidence had improved and 88% said they were more confident about going for help and knowing where to go.
Roma Support Group	Their service has been well used and that they have been able to raise awareness among professionals who now accept that the Roma community has specific mental health needs.
Sustain (gardening project)	Of volunteers using the service, 93% reported improved mental health and 88% that it had improved their physical health.
St Clement and St James Community Development Project	Helped 130 learners achieve their ESOL accreditation (with 96 being their target).

Findings: Learning and information for grantees and CBT

6. Learning and information gained through learning visits was drawn out by Renaisi and varied across grants, either being specific to the area working in,

to a particular sector or to the organisation itself. Some examples of learning which may benefit CBT's grant making decisions and practise are set out below:

- Some grantees struggle to **collect the correct monitoring and evaluation data** and see a **need to develop these processes**.
- More families are struggling to deal with the day to day stresses due to **poor housing and changes to benefits systems**.
- One grantee has learnt more about the **needs of trafficked and abused women within their community and in general**.
- One grantee recognised that **older people in need** (people in their 60s still of working age but not working or in very low paid part-time work) **are experiencing more complex issues**. The grantee felt that due to this there are higher demands on the grantee's time and they have to deal more frequently with complex cases.
- Some grantees requested **better communication from CBT** to set the scene at the start and throughout the funding period.

Total assets opportunities

7. During the learning visits, Funding Managers identified areas that grantees may need additional (non-financial) support, with the aim of providing this through the Bridging Divides' Total Assets Approach.

Areas of need identified are:

- **Networking opportunities** with other grantees, funders and organisations for volunteer recruitment or partnership.
- **Dissemination of information** about grantees' work
- Training in **monitoring and evaluation** techniques and **funding and fundraising** and mock- interviews for funding applications.
- **Mentoring and coaching** for senior staff.

Conclusions

8. The current learning visit approach is useful for identifying case studies of specific projects, maintaining a positive relationship between Funding Manager and Grantee and to some extent generalizing needs for further support.

9. However, the differences in how reports are completed, the wide variety of types of project and organisation that are funded by the Trust, and lack of focus on specific topics or questions that the Trust wants to learn about, it is difficult to extrapolate broader learning from these visit reports.

Next steps – for Heads of Impact and Learning

10. The Heads of Impact and Learning will use the full learning visit analysis alongside other data, including the grantee survey, staff consultation outputs and staff surveys, to shape the impact and learning strategy and implementation plan so that our approach to learning meets the needs of our internal and external stakeholders. In particular we will:

- Prioritise organisational wide areas of learning and use these to plan the types of learning activities to be delivered and how they may best support these areas of learning.

Consider specific recommendations from Renaisi which could include:

- Developing different types of learning visits for different stages of the funding journey.
- Making reports more consistent and easier to compare and reviewing the best type of data to collect.
- Planning and comparing learning visits across similar organisations or types of client group.

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