Impact and learning strategy and implementation plan
2019 - 2023

> **Vision**: City Bridge Trust (CBT) uses evidence and learning strategically and flexibly to drive its work to reduce inequality and grow stronger, more resilient and thriving communities in London and beyond.

Summary

In our Bridging Divides funding strategy, we committed to learn what works, what our best contribution can be and to change and adapt our work in response. The impact and learning strategy and implementation plan puts this commitment into practice by driving forward CBT's use of evidence and learning across all its work including grant-making, 'funder plus', philanthropy and social investment. This represents a step change in CBT's approach which we believe requires the Trust to achieve three major organisational cultural changes:

1. Become more evidence and data driven, using learning and data at all levels of the organisations to improve philanthropic solutions and approaches.
2. Grow our organisational learning culture, creating a culture of shared learning and reflection within the CBT team and Committee.
3. Adopt an equitable approach to impact and learning that considers questions of diversity, equity and inclusion, and the current power imbalances between funder and funded organisations, in its design as well as implementation.

For each change the strategy sets out an aim, related interim outcomes and a comprehensive suite of activities to achieve them. Examples of these are provided in the strategy, and a more detailed working implementation document exists for the team (and is available on request). The strategy also includes a set of organisational learning questions and principles for how we will work. These are intended to be used across all impact and learning activities. Our 'strategy on a page' (annex 1) summarises all the aspects of the strategy. Several terms are used throughout the strategy which we recognise are open to interpretation e.g. 'learning organisation', 'equity' and 'data'. Our 'working definitions' (annex 2) page provides our starting point for these terms, but we expect them to develop over the lifetime of the strategy.

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.

Scope of the strategy

- The strategy brings strategic focus to our impact and learning work, but we will also be flexible. Current times are uncertain, and the resilience of Londoners will continue to be tested. We will adapt the strategy to meet the changing needs of our grantees, other Londoners and CBT, aiming to incorporate our learning in real time.
- This is a strategy for the whole CBT team. The impact and learning team will oversee and enable activity, joining learning together at a strategic level, including, where appropriate, making links with the Corporation's Strategy Team, but delivery will be distributed across the team.

- The reach of our learning and data should be wide. From the outset we will share what we learn, using findings not only to improve what we do, but to help and influence others.
- The strategy covers all of CBT's philanthropic work including grant-making, social investment, philanthropy, funder plus, and the Central Grants Programme.
- Being 'evidence and learning' led is not necessarily straightforward. Evidence and data are varied, there are different forms of 'expertise', and learning is an adaptive process. Decisions based on data are subjective and open to challenge and learning needs and styles will vary.
- As a generalist, volume funder working with the resource and time limitations of this strategy, we will not be able to prioritise all the thematic areas we fund for learning. The strategy focuses and prioritises our learning.
- 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).
- We will not get everything right: it is more important that we trial new approaches and learn and improve, than that we stay static and miss opportunities to improve the impact of our work.

Development process
The strategy and action plan are products of a 9-month research and consultation period working with Committee Members, CBT team members, funded organisations and external stakeholders including other funders. Research has included: a literature review; mapping of current activities; 3 staff events; a staff survey; meetings with key City of London staff teams including Strategy, Philanthropy and Social investment; a grantee survey completed by 157 grantees; a Committee away half-day session; analysis of our work from our learning partner Renaisi; and meetings with funders. The strategic direction was signed off by the CBT committee in July 2019 and the final strategy and action planning developed for CBT's November 2019 committee meeting.

This engagement process gave us insight into the motivations of the team and committee and indicated that the success of the strategy will be dependent on the extent to which team and Committee Members engage with and benefit from it early on. We hope these benefits will include richer learning opportunities and increased motivation resulting from deeper understanding for each of us about how our work contributes to the difference the Trust is making to Londoners. There will be opportunities from the outset for team and Committee Members to trial new approaches to impact and learning and help us continue to shape our approach.

Our learning: Civil Society context
The current civil society environment is complex and uncertain. Funded organisations are facing greater demand than ever for services as well as having to flex in order to survive the tumultuous funding environment. Funders are realising that setting static outcomes for a funding period is limiting and unhelpful in this environment and that a more pragmatic approach is to emphasise continuous

learning and embrace ongoing adaptation[1]. At the same time, funders are acknowledging their responsibility to help ease the bureaucratic burden for funded organisations of having to report in different ways to different funders.[2]

CBT's investment in a more strategic approach to impact and learning was partly inspired by a number of funders shifting their focus from how they allocate funding to how and what they can learn from the organisations they fund.[3] This shift is underpinned by a more sophisticated and transparent approach to sharing data and using data for decision making among civil society organisations, exemplified by the launch of 360Giving in 2015. As of November 2019, 115 funders, including CBT are publishing their data according to the 360Giving standard.

The three aims of this strategy reflect these changes in civil society, particularly the strategy's aspirations to using data better to inform decision making, to continually learn and adapt and to place greater priority on how evidence and learning should be designed in support of funded organisations.

Our learning: CBT's current impact and learning activities
The Heads of Impact and Learning conducted a detailed review of CBT's current impact and learning activities, sought the views of staff and funded organisations on their effectiveness and compared our practice with other funders. This revealed that CBT already has a wide range of impact and learning activities, including established systems for monitoring grants and applications; bespoke commissioned evaluations; regular statistical reports; ad-hoc events with grantees and sharing of data through 360Giving. Funded organisations surveyed by the Trust generally gave a positive picture of CBT's impact and learning activities. Perhaps most positively, most grantees felt that the Trust is open to having honest conversations. However, as expected, there are a number of areas that require strengthening, including taking a more strategic approach bringing together our different workstreams towards a common purpose; a more experimental approach to reflect advances in the wider field; better feedback loops during the planning cycle; and better communication about our impact and learning approach with grantees and the wider sector.

Our learning: how we learn
One of our Bridging Divides ambitions is to become a 'learning organisation'. Over the past 9 months, we have developed our understanding of what this means and where CBT currently is on its journey to becoming a learning organisation. This has been informed by research into the origins of the learning organisation as a strategic

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[1] Comic Relief, in partnership with IVAR, *Driving Continuous learning as a grantmaker. Evidence Review: A summary*, October 2019.

[2] House of Lords Select committee on Charities. Report of Session 2016–17

[3] for example, the Esmee Fairbairn Foundation has pledged to focus at least as much on learning from their grants as on allocating them, as set out in *Learning from our grants. Insight Report,* May 2017, and has invested in more transparent data sharing across the sector to help improve organisations.

management approach,[4] applying the theory to our own work,[5] and learning from effective learning organisations, including the Pears Foundation and the Corra Foundation. It has also been informed by learning about how civil society employees are motivated through learning about how their work can help them to better contribute to the mission of an organisation they believe in.

We have adopted the following working definition of a learning organisation:
'An organisation which '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' (IVAR)

We tested this definition and refined our approach to this outcome through a staff survey and consultation sessions with Committee Members the CBT team. We know leadership is critical to an effective learning organisation. We spent dedicated time with senior leadership and Committee thinking about their role in leading a learning organisation. Figure 1 shows some emerging thinking and further development is built into the strategy.
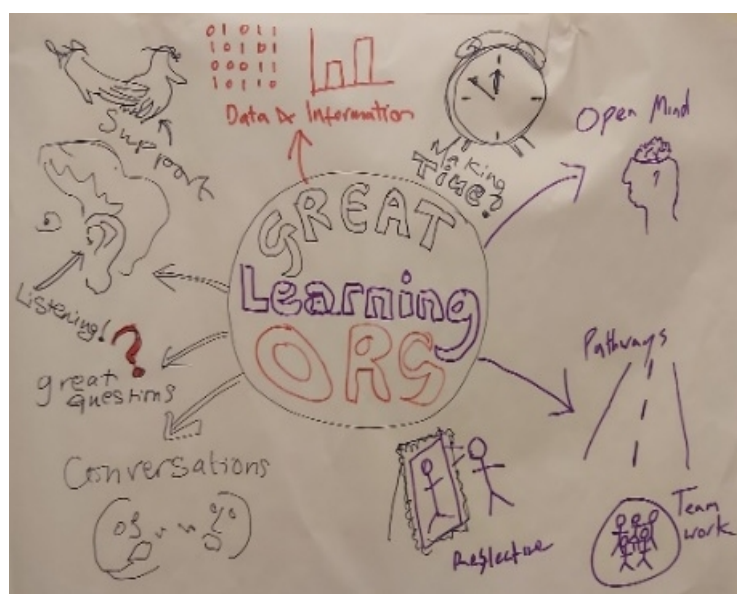

Figure 1: poster created by Committee and senior leadership showing the elements of a great learning organisation
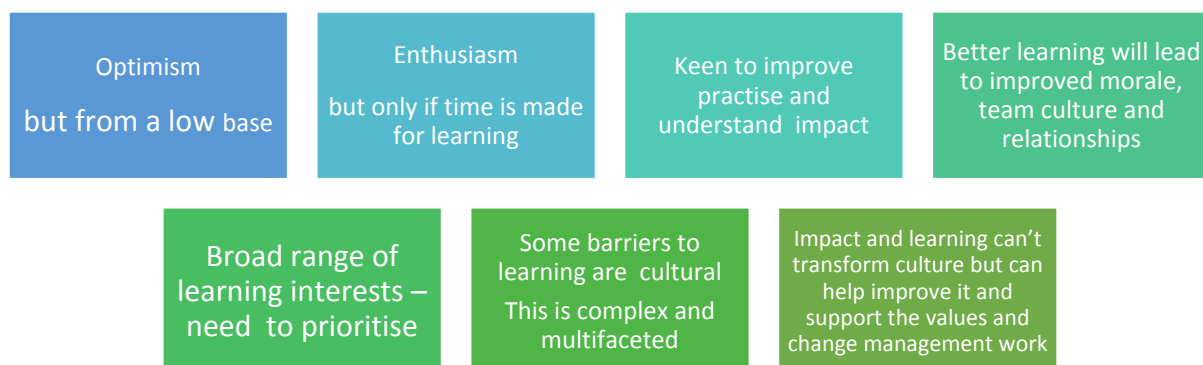
Figure 2 summarises the key views from the team. Whilst most felt that we are at the beginning of our journey to becoming a learning organisation, most are willing to contribute and optimistic about the potential. Unsurprisingly, at this stage, the primary motivation for becoming a learning organisation is internally focused. There is a feeling that we should get our 'own house in order' and focus on improving our own practice, making more intelligent funding decisions and judging the impact of our own activities.[6] This is reflected in the outcomes we have chosen to focus on in the strategy.

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[4] De Geus 1988: https://hbr.org/1988/03/planning-as-learning

[5] e.g. Garvine et al list 3 building blocks for an effective learning organisation: a supportive learning environment, concrete learning practices and leadership that models effective learning behaviour; 2008: Garvin, Edmondson and Gino, Harvard Business School and Mellon University

[6] Based on IVAR survey categories

Figure 2: Summary of CBT team views on current learning culture

Optimism but from a low base	Enthusiasm but only if time is made for learning	Keen to improve practise and understand impact	Better learning will lead to improved morale, team culture and relationships
Broad range of learning interests – need to prioritise	Some barriers to learning are cultural This is complex and multifaceted	Impact and learning can't transform culture but can help improve it and support the values and change management work	

Our learning: equity and impact and learning

In recent years equity, diversity and inclusion have come increasingly to the forefront of trust and foundation thinking, challenging funders to re-examine their own practices, processes, assumptions and norms including through their impact and learning activities. CBT's mission is to reduce inequality and grow stronger, more resilient and thriving communities. Many of our grants programmes specifically aim to promote equity, for example, projects for Deaf and disabled people and older people, and support for survivors of domestic and sexual abuse. This gives us privileged access to a vast amount learning and data; relationships with experts in the field; and the opportunity to listen to the views of communities through the organisations we fund. We are also aware that as a funder, there is a power imbalance between us and the organisations we support which can play a significant role in shaping our impact and learning activities and thinking.

This area of our strategy has seen the most development during the 9 months of the strategy's creation. Taking inspiration from ACF's Stronger Foundations work on equity, diversity and inclusion[7] and from the US movement around equitable evaluation[8], we realised that to truly begin to achieve our Bridging Divides mission of reducing inequality, and to respond to the spirit in which the strategy was written[9] we need to consider questions of diversity, equity and inclusion at a fundamental level and at the design stages. For example, considering what questions we ask (and do not ask); the type of grant monitoring and evaluation processes we use; who the findings are accessible to, useful to and owned by; whether our work tackles the systemic drivers of inequality, whether we are comfortable to talk about our failures; and whether we are aware of the communities and areas we are and are not reaching.

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[7] Diversity, Equity and Inclusion: the pillars of stronger foundation practice, 2019, ACF, https://www.acf.org.uk/downloads/ACF_DEI_Thepillarsofstrongerfoundationpractice_final.pdf - in particular see Pillar 3, 5 and 7

[8] Center for Evaluation Innovation, Institute for Foundation and Donor Learning, Dorothy A Johnson Center for Philanthropy, Luminare Group. "Equitable Evaluation Framing Paper." Equitable Evaluation Initiative, July 2017, www.equitableeval.org.

[9] "The need to speak 'truth to power' and ensure the voiceless are heard has come across overwhelmingly" https://www.citybridgetrust.org.uk/blog/

For this strategy we have decided to use the term 'equity' and are using the following working definition: *'"Equity" involves the promotion of justice and equality of opportunity and outcomes within the procedures, processes and distribution of resources by institutions or systems. Tackling inequity requires an understanding of the underlying or root causes of disparities, both at the point of access and in terms of outcomes, within our society'.*[10]

This stream of work will be closely related to the implementation of our values of 'inclusion' and 'representation' which we see as approaches to achieving equity. Equity is a much broader concept and links to our overall mission to reduce inequality and grow stronger, more resilient and thriving communities. In the impact and learning strategy we have considered equity in relation to different communities and identities; but also in relation to power imbalances between funder and funded organisations, pertinent to us in our philanthropic role. We think it is important for new ways of funding we are considering, for example, Cornerstone with its link to systems change and commitment to partnership; and the small grants programme which has the potential to open up our funding to different types of organisation.

The strategy

The vision for the impact and learning strategy supports the vision of Bridging Divides: CBT's 2018 – 2023 funding strategy and is closely aligned to both the Philanthropy Strategy (especially the role-modelling pillar) and the Communications Strategy. To achieve the Bridging Divides vision we believe we need to see three cultural shifts: to be evidence and learning led; to become a learning organisation; and to embed equity into our impact and learning work at all stages. We have taken each of these areas and broken them down into outcomes, prioritising what we believe is most pressing for CBT at the start of its journey.

Vision for Bridging Divides:
To **reduce inequality** and grow **stronger, more resilient, thriving communities** for a London that serves everyone

Vision for Impact and Learning:
To use evidence and learning **strategically** and **flexibly** to drive our work to **reduce inequalities** and foster **stronger more resilient, thriving communities** in London and beyond.

By the end of 2023 we aim to:
1 **Improve philanthropic** solutions and approaches
2 Grow our **organisational learning culture** at all levels
3 Embed an **equitable approach** to impact and learning

[10] ACF adapted from Grantcraft 2018
https://www.acf.org.uk/downloads/ACF_DEI_Thepillarsofstrongerfoundationpractice_final.pdf

Aim 1: Improve philanthropic solutions and approaches

We want to become more evidence and data driven, using learning and data at all levels of the organisations to improve philanthropic solutions and approaches. Most of our activities will be focused on this aim. This focuses us in on what we want to learn and why and puts in place some tangible steps to achieve this. We have developed a set of organisational learning questions (see annex 1) to enable a more strategic approach to building organisational knowledge using findings and learning from across all our

CBT learning questions
Provide clarity of purpose of the learning agenda: what we want to learn, why and to what end. New and existing impact and learning activities will refer to these questions allowing them to contribute to wider organisational knowledge alongside any bespoke learning questions.

work. To achieve this aim, we have set out four outcomes which reflect our current organisational position and aspirations.

To achieve the following outcomes, activities in 2020/21 will include:
Commission 2 annual learn and improve explorations of what we fund starting in 2020/21 with our environmental and accessibility work; refine our organisational theories of change and agree how we will baseline and measure our overall progress; provide regular (bi-monthly) and ad-hoc data analysis and insights using different types of data and learning, including findings from external sources, to support the team and Members to make effective decisions; and review Bridging Divides monitoring practices and pilot new approaches (initial focus on monitoring forms and learning visits).

> 1. **We have a better understanding of the difference CBT's work makes and how it can be improved**

CBT's work spans many thematic areas and many different types of work. We do not directly deliver work to benefit Londoners but enable and support other civil society organisations to do so. This means it can feel challenging and at times feel overwhelming to measure our impact. But by asking the right questions we can improve this process. We will focus on developing organisational wide theories of change and ways to baseline our work, alongside diving deeper into specific funded areas.

> 2. **We make better use of evidence and learning, including team and grantee knowledge, to shape our work**

There is a huge amount of knowledge within the CBT team, but we do not use this to its greatest potential. We will trial new ways of sharing learning ranging from better

knowledge management (methods of collating and storing knowledge centrally) to exploring whether Funding Managers should be specialists, generalists or somewhere in the middle. We will draw on our funded-organisations and research from further afield to better understand the external environment and what it means for our philanthropy.

We will need to agree how we want our findings to shape our work e.g. whether this focuses on what we fund, where we fund or how much funding we prioritise for different activities. To ensure our findings result in changes to our work, impact and learning activities need to be part of feedback loops whereby we continuously set our learning parameters, gather and analyse the data, learn from the findings and share and respond to lessons learned. Currently most activity focuses at the 'gather and explore' stage. In the strategy implementation we have built in more opportunities to learn from our findings and use them to make sure our practice and decision-making is effective and will need to expand these as our work develops.

Figure 3: impact and learning cycle

> **3. We share our findings more routinely and accessibly including where things haven't worked to influence policy and practice more widely**

As the charitable arm of Bridge House Estates and as London's largest independent funder, CBT is in a unique position to reach across different sectors including other funders, wider civil society, local government and Government. Reflecting and supporting the priorities of both the Philanthropy and Communications Strategies, we will look at ways to openly and honestly share our findings, prioritising other funders and funded organisations, including where things have not worked, through events, blogs and networks.

> **4. We have higher quality, more purposeful data collection and analysis systems**

CBT already has some data analysis capability, but we are ambitious about developing this into a fully-fledged data analytics function by taking on a specialist Data Analyst. Through this function we will baseline our current work, undertaking the charity Data Maturity Self-Assessment and will improve how we collect, analyse and use our data. We will provide more analysis and insights and coach team members to better use data in their work.

> **Aim 2: Grow our organisational learning culture at all levels**

We want to grow our organisational learning culture, creating a culture of shared learning and reflection within the CBT team and Committee. This is very much an enabling aim – if we are not successful in becoming a learning organisation the success of our other aims will be limited. However, our success here is predicated on a significant cultural shift, as well as significant leadership engagement, and the level of change should not be underestimated. We have therefore set out below three initial outcome areas which strongly reflect the feedback from our analysis of the CBT team and Committee and are grounded in good practice / theory.

To achieve the following outcomes activities in 2020/21 will include: full team training in how to learn together (e.g. in appreciative inquiry or similar); 2 SLT and committee 'leading a learning organisation' sessions; 6 team 'sit down' learning sessions; apply organisational learning questions across all new and (where possible) existing impact and learning activities starting with grant monitoring systems.

> 1. **We have a more supportive learning environment that creates time and space for learning**

While there is widespread enthusiasm for working together to become a learning organisation, this will not be possible without dedicated time for learning activities and the perspective that comes with creating space to reflect. To overcome this we will deliver an engaging programme of learning events, with an initial focus on the skills needed by all team and Committee members to learn together effectively and targeted events for senior leadership and Committee on how to lead a learning organisation, including impact and learning in new member inductions.

We will develop a programme of learning which will be strategic, with a focus on how each activity will move us closer to our vision. Activities will include curating regular

> 2. **We have a more strategic and diverse range of practices and processes to support team and individual learning**

> 3. **We have a clearer and shared understanding of what our learning priorities are**

team "sit down" meetings, drawing on the skills of the team to deliver peer support and training sessions and trialling dedicated, weekly, work-related self-learning.

We will apply our organisational learning questions across all our activities and processes, to ensure our learning is purposeful and helping to move us towards our values, mission and vision. We will start by reviewing our grant monitoring systems through this lens. '

> **Aim 3: Embed an equitable approach to impact and learning**

We want to embed an equitable approach to impact and learning that considers questions of diversity, equity and inclusion, and the current power imbalances between funder and funded organisations, in its design as well as implementation. We have set out 5 key outcomes to start us on this journey, as well as some principles to guide all our activities (see annex 1).

> **Impact and learning principles:** a checklist for all impact and learning activities to ensure we are working in fair and equitable ways.

To achieve the following outcomes activities in 2020/21 will include: Establish external impact and learning advisory group predominantly drawn from funded organisations including equality-led organisations; commission trust and foundation benchmarking survey with applicants and grantees; take part in GrantAdvisor pilot; review and analyse staff demographic data already collected.

> 1. **Increased understanding of the impact of our funding on diversity, equity and inclusion**

Whilst CBT has some existing impact and learning good practice around diversity, equity and inclusion we realise that not only have we got a long way to go, we do not necessarily know what journey we need to take. To achieve this, we will need to engage and learn from sector-wide initiatives, work more closely with our grantees and work closely with the team Equality Champions and cross-team values implementation group.

> 2. **More meaningful opportunities for funded organisations to influence us and hold us to account**

Power imbalances between funder and funded organisation as well as an accountability deficit where funders are not held to account by the same rigour they would hold funded organisations to account, limit the opportunities for funded organisations to provide meaningful feedback. As a first step we will establish an impact and learning advisory group primarily made up of funded organisations. We will continue to take part in the pilot of 'GrantAdvisor'.

> 3. **We more routinely and effectively share the success and learning of funded organisations and the people they support**

City Bridge Trust has access to a vast amount of data and learning about the organisations we fund including success stories, practice learning and reflection, thematic and geographic expertise and published evaluations/reports. We will better share this learning and provide opportunities to showcase funded-organisation success and learning.

With the appointment of a Data Analyst we will continue to provide and improve analysis of our funding by theme, community and geography, and will use this to generate insights about what and how we fund. We will work alongside 360 Giving and other funders to provide our data in a form that is useful to others. We will ensure all team and Committee members have regular opportunities to meet face to face with funded organisations including those from equality-led organisations.

We know that for a more equitable impact and learning strategy we need to better understand our organisational history, diversity and unconscious bias. We will analyse our staff demographic data and with the CBT Equality Champions find opportunities for team diversity, equity and inclusion training.

Conclusions

We believe the success of the strategy is largely based on the extent to which the team engage with it as their own and gain the benefits of richer learning and better insight into the difference the Trust is making. For this reason we have designed it so that from the start there will be various pilots and initiatives for interested team members to take part in, including a self-learning experiment, trialling new approaches to grant monitoring, managing evaluations and bringing their skills to the team training programme, potentially co-facilitating. Throughout the strategy creation we have focused on consulting with and engaging the Committee and team. We will continue to put our efforts into this as we implement the strategy to help create a culture where people are motivated to learn together in order to achieve better outcomes for Londoners.

Measurement

We have established several key methods of measuring the success of the strategy and will develop these further as we agree the organisational theories of change and baseline.

- 6-monthly and annual Bridging Divides progress reports delivered by Renaisi
- Measuring Up! Self-assessment to baseline our current impact practice
- New digital Data Maturity Self-Assessment tool for charities to baseline our data maturity
- 2 yearly benchmarking survey assessing our relationship with funded organisations and applicants
- Annual grantee survey and analysis
- Annual team survey and analysis of our progress towards being a learning organisation

Risks and mitigations

Risks	Mitigations
Cultural barriers to change	Continue to involve the team in the implementation progresses and ensure they are clear how their feedback is taken on board. Engage with wider change management process
Not enough resource to realise ambition	Prioritise actions that will make the biggest impact Look at creative ways to achieve goals Explore additional staffing resource if necessary
Work is not sufficiently integrated across all CBT's functions	Continue to meet regularly with staff representing different organisational functions e.g. social investment and philanthropy
Committee and SLT not sufficiently engaged in the strategy	Specific sessions planned for committee and SLT on their leadership role in creating a learning organisation Attend SLT and committee regularly to share progress
Not asking the right questions to ensure we add value	Organisational wide evaluation questions Consultative process with team, sector colleagues and grantees

How does this link to other CBT work?

The impact and learning strategy cannot be delivered in isolation. To ensure effective delivery we will work closely with the communications strategy, organisational values implementation, the wider programme of change work (including the Bridge House Estates and wider charities review) and the CBT Equality Champions.

Resourcing

Resources available to support the delivery of the strategy are: Head of Impact and Learning; Data Analyst; support from the Philanthropy Director and CBT's Head of Communications; input from all team Members; and Renaisi our learning partner. If our ambition requires further support, we will explore additional staffing resource.