

Committee	Dated:
City Bridge Trust (CBT)	17 th September 2019
Subject: Review of Bridging Divides – Year 2	Public
Report of: Chief Grants Officer & Director of City Bridge Trust (CGO)	For Information
Report authors: Ruth Feder/ Jemma Grieve Combes, Head of Impact & Learning	

Summary

Bridging Divides is CBT's five-year strategy running from April 2018 until 2023. For each year of the strategy your learning partner Renaisi provides a review of progress towards implementing the strategy with recommendations for the coming year. At your May 2020 meeting you received initial headlines from the end of year 2 (2019-20) report. The report is brought to you in full today (see Appendix 1).

It should be noted that the work was commissioned before the Covid-19 lockdown and covers the full 12-month period from April 2019 to March 2020. The Covid-19 crisis has had a substantial impact on the Trust's work and focus at the very end of this period. Some insights are provided on this and implications of Covid-19 are addressed in the Trust's future work in section four, 'Year 3 and onwards', but it was not commissioned as a Covid-19 specific report.

One of Renaisi's recommendations is that CBT designs a process to formally review and adapt the Bridging Divides strategy to ensure that it remains relevant in the new COVID-19 context. The 'Redesigning the Trust's work for the Covid-19 health crisis and beyond' elsewhere in today's papers directly responds to this.

Your Impact and Learning team are co-ordinating the recommendations for CBT, as well as addressing the recommendations around learning outputs for an external audience and creating an internal Impact and Learning working group.

This paper is intended for the Committee's information and there are no decision points.

Recommendation

Members are asked to:

- a) Note information on progress towards implementing Bridging Divides to date, including key learning points and recommendations, as presented in the attached Appendix.



Annual review of Bridging Divides


Year Two, 2019-20

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Renaissi

April 2020

Contents



Executive summary	1
1. Introduction	3
1.1. Our work for City Bridge Trust.....	3
1.2. Overview of Bridging Divides	3
1.3. Overview and aims of this report.....	4
1.4. The impact of COVID-19.....	4
2. Progress towards actions	6
3. Reflections and learning	9
3.1. Reflections on the Bridging Divides strategy	9
3.2. Working for the Trust	12
3.3. The Committee and governance	15
3.4. Values	16
3.5. The Trust as a learning organisation.....	20
3.6. Other pillars of the Bridging Divides strategy	28
4. Year 3 and onwards	30
5. Conclusions.....	32
6. Recommendations	33
Appendix 1: Values.....	35

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This report was authored by Alice Thornton, Kandy Sisya and Amanda Norrlander from Renaisi's Consultancy Team.

April 2020

Executive summary

Progress this year

- **The Trust has made significant progress** on embedding values and on becoming a learning organisation.
- **There have been some significant changes to what the Trust offers** including extending the small grants offer.
- The Trust has made some **important progress on strategic work** with the City of London Corporation and Bridge House Estates.
- **The COVID-19 crisis has fundamentally tested the Trust's ability to be agile and responsive, and able to adapt.** This provides an opportunity to assess how well Bridging Divides, and progress made in the previous two years, has prepared the team to be adaptive in this situation.

Reflections on the Bridging Divides strategy

- **The strategy is ambitious** and may not be fully achieved within five years. Becoming a more relational funder is challenging whilst also managing high volumes of grants.
- **COVID-19 challenges the relevance of Bridging Divides, and as well as opening up new opportunities.** Bridging Divides is a high-level strategy which allows for flexibility, but COVID-19 has created a completely different context. The strategy may need to be reviewed to ensure that it remains the right framework to help the Trust respond appropriately to the crisis in the medium-long term.

Working for the Trust

- **The Trust's working culture has improved significantly** since the previous year, although team members can find the influence of the Corporation's culture challenging.
- **Staff generally feel supported and trusted by the leadership team**, however there is an appetite for more delegated work and some team members would benefit from more structured support.
- **Internal communication has improved** but is still a work in progress. Improvements have included Stand-Up meetings and monthly emails from the Chief Grants Officer. Some team members would like further steps to be taken to create an atmosphere where internal communications can happen more easily.

The Committee and governance

- This year has seen some **significant changes to the Trust's governance structure**, which has been well received by Committee Members and staff.

Values

- The Trust has made **significant progress on embedding values** internally in the team's ways of working.
- Staff were generally positive towards the work that has been done on values and **73% of staff are motivated by the values in their day-to-day work**.
- **The values working group has made good progress**, however some barriers remain to further engagement from the wider team.
- There has been **less progress in implementing some values than others**, notably 'environmentally responsible' and 'representative'.

The Trust as a learning organisation

- The Trust has also made **important progress on becoming a learning organisation**. Team members feel that it is further along in its journey to becoming a learning organisation, compared to six months ago. Nonetheless there is still some way to go on this journey.
- **There is an enthusiasm and willingness amongst the team to support** the Trust's development as a learning organisation. The Trust has improved its learning culture thanks in part to the values work, regular team meetings and shadowing opportunities.
- **The Trust is currently better at sharing learning internally than externally**. The Trust could do more to use the data that it already holds on grantees. The recent appointment of a Data Analyst is a positive step towards making better use of this data.
- Barriers to learning include **more formalised or structured processes** to ensure that learning is embedded.

Other pillars of the strategy

- The core elements of **what the Trust funds have been developed and are now embedded in the Trust's approach**. The **Funder Plus offer** has been launched and is in pilot (recently paused as a result of COVID-19) and the wider '**toolbox**' of support is in progress. This has meant that there has been less emphasis on these areas of the strategy in the second year of Bridging Divides.
- Staff are **generally excited about the Funder Plus support**, but are sometimes **unclear about what the offer comprises**.
- The Trust's **core funding offer needs to be clarified** and re-launched.

1. Introduction

City Bridge Trust launched Bridging Divides in 2018 with an ambition for it to be ‘a strategy that learns and adapts’. To stay true to this ambition, the Trust commissioned Renaisi through a competitive process in February 2018 as a learning partner to act as a critical friend and help the Trust to learn from its work in real time.

Renaisi produced the first annual review of the Bridging Divides strategy in April 2019. This report is our second annual review, providing an update on progress at the end of the strategy’s second year. It builds on interim analysis provided in a shorter update review completed in February 2020.

1.1. Our work for City Bridge Trust

Renaisi is a social enterprise that has been helping people and places to thrive for more than 20 years. We do three complementary things:

1. Run services that help people achieve economic and social inclusion.
2. Work with institutions across the UK to understand and evaluate their impact on communities.
3. Generate learning from across our work to explore what it takes to improve a place.

In the last year, our role as learning partner for the Bridging Divides strategy has become more embedded, as we have become more familiar with the Trust’s team, processes and ways of working.

This year we have delivered different types of work that have added value to the team in different ways:

- Some distinct, stand-alone **analytical pieces** to move thinking forward on certain key areas of work (for example, analyses of application data and learning visits)
- Some **research pieces**, to summarise knowledge from external sources to inform your work (for example, three ‘horizon scans’ on refugees and migrants, disabled people and the climate crisis)
- **Advisory and critical friend support**, providing challenge, ideas and recommendations to guide your work (for example, comments on early drafts of the Impact and Learning Strategy as well as the completed Strategy)
- Providing an **external, neutral convening role** (for example, facilitating the team Away Day on embedding values, in November 2019)

1.2. Overview of Bridging Divides

Bridging Divides is City Bridge Trust’s five-year strategy, launched in April 2018. The strategy was developed over nine months in collaboration with the civil society sector through interviews, focus groups and consultation. The strategy includes seven key pillars:

- City Bridge Trust's Vision and Mission
- City Bridge Trust's Values
- What City Bridge Trust will fund
- Funder Plus support
- City Bridge Trust's Toolbox
- Defining success
- A strategy that learns and adapts.

The full strategy, and a one-page overview, can be found on the Trust's website [here](#).

1.3. Overview and aims of this report

This report provides a review of progress in implementing the Bridging Divides strategy in its second year (2019-20). The aims of this review are as follows:

- To analyse the success of Year Two of the Bridging Divides strategy, particularly looking at the reflections and learning from the year as well as progress towards actions in our first annual report (April 2019) and update report (February 2020).
- To understand the development of the Impact and Learning strategy, in particular how the Trust grows its organisational learning and data culture at all levels.
- To recommend areas of change, learning and improvements for year three and beyond.

The report has a particular focus on two 'pillars' of Bridging Divides which have been strong focus areas this year: a strategy that learns and adapts, and City Bridge Trust's values. We also discuss some general reflections on Bridging Divides, what it is like working for the Trust, the work of the Committee as well as a short review of the three pillars – what CBT funds, CBT's toolbox and Funder Plus support.

The review has been informed by the following research activities:

- **Nine phone interviews** with two Committee Members, three funding managers, one corporate volunteering manager, one funding officer, and two members of the leadership team. Five interviewees had been with the Trust for less than 2 years, two for between 2-5 years and two for more than 9 years.
- A **survey** completed by a total of 15 out of 34 staff members to provide an 'temperature check', helping the Trust understand where they are on their organisational values and learning journey, and how they can improve this going forward.
- A **review of relevant documents** for example the Impact and Learning strategy and the core funding Committee report.
- Fortnightly **conversations with the co-Heads of Impact and Learning**.

1.4. The impact of COVID-19

Since we started to work on this review, the day to day activities of the Trust have changed dramatically. All staff are now working from home, all programmes are shut for new applications and the staff team is currently working to deliver the covid-19 emergency response. The pillar 'a strategy that learns and adapts' is being tested in ways that the Trust could not have foreseen.

The Trust is therefore eager to learn from the ways in which the operations have changed and how the benefits of these changed ways of working may be built into the new “normal”.

This report starts to address these questions, however it is an annual report which covers the full twelve months between April 2019 and March 2020. The COVID-19 crisis has had a substantial impact on the Trust’s work and focus at the very end of this period. Four of the nine interviews were completed before the period of COVID-19 lockdown, and therefore did not reference the impact of this crisis, but five interviews and the staff survey were completed after the lockdown was implemented. Despite asking questions about the whole year, the COVID-19 crisis has inevitably affected responses to the survey, and the topics and perspectives discussed in five of the interviews. Where possible, we provide some insights into the impact of COVID-19 throughout the report based on information currently available. We also address the implications of COVID-19 on the Trust’s future work in section four, ‘Year 3 and onwards’.

2. Progress towards actions

Renaissi completed a detailed update on progress made towards actions against each of the seven pillars of the Bridging Divides strategy in February this year.¹ This section of the report provides an overview of that assessment, summarising the key strands of work completed as well as any further actions completed since February.

A strategy that learns and adapts

- ✓ Impact and Learning Strategy and implementation plan 2019-2023 completed, and approved by Committee in November 2019.
- ✓ LocalMotion collaboration with other funders launched.

Since February 2020

The Trust has rapidly adapted to the current COVID-19 situation through several strands of work, including:

- ✓ Taking a leading role in instigating **the London Funders COVID-19 pledge**.²
- ✓ Together with the Mayor of London and London Funders, City Bridge Trust has **launched a new emergency fund** called the London Community Response Fund (LCRF) with an initial £1 million provided by the Trust and another £1 million from the Mayor of London.
- ✓ The Trust has published a FAQ document on its website, which serves as **guidance for funded organisations** during the COVID-19 crisis.³
- ✓ The Trust has developed a **shorter monitoring and evaluation form** for grantees to capture learning in a way that responds to the time pressures likely to be experienced by grantees at this time.
- ✓ The Trust is currently working with **360Giving** and others to **identify appropriate ways of coding grants** (for example, new COVID-19 grants, changes in grant due to COVID-19) and is aiming to upload its grants data to 360Giving on a regular basis to help create a real time map of funding.
- ✓ The Trust's staff have **transitioned to home working**, including hosting online coffee breaks, stand up meetings and team learning meetings.
- ✓ Awarded **202 unrestricted grants totalling £1,709,067** to current grantees with a turnover of under £500,000 to help them cover some of the losses they have incurred through the pandemic.

City Bridge Trust's values

¹ Renaissi, *Bridging Divides: Update Report – Update on progress and brief reflections on the Impact and Learning strategy* (February 2020). Please refer to the table that spans over pages 2 to 9 for a detailed breakdown of what has been done, what is in the pipeline and what further action should be considered.

² London Funders, *We stand with the sector* (March 2020). Retrieved from: <http://covid19funders.org.uk/>, 6 May 2020.

³ City Bridge Trust, *Coronavirus: guidance to funded organisations and applicants* (28 March 2020). Retrieved from: <https://www.citybridgetrust.org.uk/wp-content/uploads/2020/04/Covid-19-FAQs.pdf>, 27 April 2020.

- ✓ Adopted six amended values: The Trust aims to be Progressive, Adaptive, Collaborative, Inclusive, Environmentally Responsible and Representative.
- ✓ Hosted a team away day focused on embedding the six values internally.
- ✓ 'Green shoots' identified by values leads and a priority action plan document was created in December 2019.

Since February 2020

- ✓ The Trust has published a piece on its website⁴ to share **how it is staying true to these values** during this current situation.

What City Bridge Trust funds

- ✓ Following a review, small grants are now offered for three years instead of one.
- ✓ Grants up to £50K can now be approved by the Chief Grants Officer and between £50,001 and £100,001 can be approved by the Chair and Deputy Chair of Committee. Committee meetings now focus on higher value applications.
- ✓ One of the key ambitions under the Bridging Divides strategy was to launch a new core funding offer. This was launched in 2019 but received disappointing take up and there were concerns around how to consistently assess applications. In November 2019, the Committee approved a pilot to trial a way of supporting the operational stability and longer-term sustainability of current grantees using a relational approach. This pilot is still in development.

Since February 2020

- ✓ The London Community Response Fund (LCRF) that the Trust has contributed to is constantly working to find ways to support organisations through the COVID-19 crisis. The fund was launched on the 27th March 2020 and the uptake has been high from the start.
- ✓ The Trust is offering variations in funding to current grantees to help them get through the current COVID-19 crisis.
- ✓ The Trust has temporarily closed applications for all programmes except Small Grants and Stepping Stones, but are still accepting applications for continuation funding to support grantees who already hold a grant from the Trust.
- ✓ The Bridge House Estate Strategic Governance review continues to progress, with a view to enhancing the impact and reach of the charity's activities for the public benefit and to model good practice.⁵ It was originally anticipated the Review would be complete by Autumn 2020, followed by a period of implementation of any changes that been agreed. Given the impacts of COVID-19, the original target date may be impacted and is currently being kept under close review.
- ✓ At the current time the Deputy Chief Grants Officer can approve grants of up to £100K (grants of >£50k in consultation with the Chamberlain) under a new temporary threshold agreed in March, to support the business of the Trust through the current COVID-19 situation, whilst

⁴ City Bridge Trust, *Adaptive and Responsive: Our Aim Right Now* (27 March 2020). Retrieved from: <https://www.citybridgetrust.org.uk/living-our-values-during-covid-19/>, 27 April 2020.

⁵ Significant progress has been made to date in determining the funding requirements for the maintenance and replacement of the five Thames bridges; agreeing a new reserves policy for the charity and allocating surplus unrestricted income funds for charitable funding; seeking governance changes by Supplemental Charter through the Privy Council; developing a new overarching strategy for BHE; and devising a new investment strategy for the charity.

grants of up to £250K can be approved by the Deputy Chief Grants Officer, in consultation with the Chair, Deputy Chair and the Chamberlain.

- ✓ In March 2020, the Court of Common Council approved £200m for the Bridging Divides funding strategy in addition to the £125m allocation noted above. The Trust is consulting with other funders, policy makers and the wider voluntary sector regarding how the funding can best be deployed in order to tackle inequality and disadvantage amongst London's communities. However, it is likely that a substantial element will be towards re-building the sector post the Covid-19 crisis.

Funder plus support and City Bridge Trust's toolbox

- ✓ Developed and launched the Trust's Funder Plus offer.
- ✓ Total assets - aide memoire and directory completed in December 2019.

Since February 2020

- ✓ The Trust has clarified in its coronavirus FAQ document that all funding managers are committed to be flexible and supportive to grantees.

Summary: Progress towards actions

- The Trust has made significant progress on embedding values and on becoming a learning organisation.
- There have been some significant changes to what the Trust offers including extending the small grants offer.
- The Trust has made some important progress on strategic work with the City of London Corporation and Bridge House Estates.
- The COVID-19 crisis has fundamentally tested the Trust's ability to be agile and responsive, and able to adapt. This provides an opportunity to assess how well Bridging Divides, and progress made in the previous two years, has prepared the team to be adaptive in this situation.
- There are still areas of work to be done including monitoring the turnaround time for applications, further review of the Funder Plus offer, and updating the application rate analysis (for a more detailed list, please refer to our February update report).

3. Reflections and learning

This section outlines staff and Committee Members' reflections and learning on the second year of Bridging Divides. It covers general reflections on the strategy, their experience of working for the Trust, Committee and governance, values, and the Trust as a learning organisation.

3.1. Reflections on the Bridging Divides strategy

The strategy is ambitious and may not be fully achieved within five years

The overall aims and ambitions of the strategy have not changed since it was launched, although some refinements to wording have been made in the last two years.⁶

The strategy is ambitious and represents some significant changes to ways of working, compared to the previous five-year strategy. Amongst those interviewees that have been with the Trust for more than two years, 'ambition' was the most common word used when describing the difference between the previous strategy, *Investing in Londoners*, and *Bridging Divides*. Some interviewees felt that it was unrealistic to achieve all of these changes. The Trust is now approaching the halfway point in the strategy's lifetime, and is still in the process of implementing parts of the strategy, which worried some interviewees. As a result of this, the Trust has started conversations about the next five-year strategy phase being developed as a 'Bridging Divides part two' (2023-28).

Our first annual report highlighted that interviewees felt that developing the strategy took too long, compared to the amount of time left for implementation. This was reiterated in recent interviews; interviewees felt that the strategy is high-level and could have been better operationalised.

"The time and resources that went into the development of Bridging Divides was so heavy compared to the time we have to implement the strategy. Given how different a way of working it is..."

Staff member

However, having a high-level strategy has allowed the Trust to be more flexible with what they do within those five years, and there is ongoing scope to build on this strategy after the end of Bridging Divides.

"This strategy was the first attempt to create a framework for funding that does not necessarily have a start and an end, it is a foundation for ongoing tailoring and improving. It is not something that will finish, rather evolve."

Committee Member

⁶ For example, the Trust has refined its vision to focus on 'stronger' rather than 'cohesive' communities

Becoming a more relational funder is challenging whilst also managing high volumes of grants

The previous strategy mainly focussed on grant-making operations. Although grant-making still remains at the core of what the Trust does, Bridging Divides aims to go beyond that by setting out ways to support organisations holistically and strengthen the wider sector. The Trust continues to be a high-volume funder, but also aims to use its networks and knowledge to become a more relational funder.

"We wanted to change the ways we work with organisations. We try to move beyond what perhaps could be a transactional relationship, awarding the grant and waiting for the return of M&E information. We wanted something more active and something that allows us to stay close to the difference made."

Staff member

Despite this ambition, some interviewees noted that not all grantees see the Trust as a relational funder. They felt that the time pressures of assessments was a barrier to funding officers and managers working in a more relational way, particularly during times when there is a high volume of applications.

"I think the way we deal with grantees is quite relational. I've been generally quite surprised when people think we're not."

Staff member

Some of those interviewed feel that the Trust has too much of a 'one size fits all' approach' and felt that it should shift to a 'grantee first' model.⁷ One interviewee stated:

"We play an important role in the voluntary sector in London. It feels to me we're doing it in a way that, each individual organisation isn't valued as an individual organisation. They're all seen as one statistic in a huge portfolio of grants, which I don't think is the right way to do it."

Staff member

Adopting a 'grantee first' approach is not specified in the strategy nor is it a term that used by the Trust, however it does resonate with the core values and ambitions of the strategy and could be an area to explore for further development in future.

COVID-19 challenges the relevance of Bridging Divides, and as well as opening up new opportunities

Inevitably, the Trust's response to COVID-19 was referenced in the interviews. Many of those interviewed were positive about the Trust's quick response, including the set up of the

⁷ The term 'grantee first' was used by one interviewee and referred to an approach of putting the grantees at the centre of every decision being made at the Trust.

emergency fund together with London Funders and the Mayor of London, and the level of flexibility given to current grantees.

However, interviewees questioned how relevant the strategy continues to be in a crisis like the current one. It was developed when this current situation would have been hard to imagine and some interviewees felt that there is a need to go even beyond the level of flexibility that the strategy already affords.

“The strategy set us up well before the crisis. But truthfully, Bridging Divides has to be slightly side-lined in the crisis. We have to be more flexible than that, and we have to be getting funding to people... We have to take more risks. Time is of the essence in the next months and normal processes cannot apply.”

Committee Member

Whilst this period of time is challenging for everyone, it also provides opportunities. Interviewees highlighted that there is an opportunity for learning and for challenging many current assumptions. For example, it raises challenging questions about the adequacy of organisations holding three months' free reserves in case of emergency. There is now an opportunity to focus even more on evidence and learning, and it might be useful to think about ways to carve out enough time and resource to do this.

“It is important to recognise the growth and learning whilst acknowledging the gaps throughout this time... There is an opportunity to suggest radical changes to how CBT does things - however evidence is required to make the case for those changes.”

Staff survey response

One of the Committee Members highlighted that Committee has quickly adapted to this new situation with great success. Being in a new setting and undertaking work in a new way has changed the dynamic within the Committee in a positive way. There may be scope for capturing this learning and adopting these new ways of working going forward.

“Because of COVID-19, we had our last Committee meeting over Microsoft Teams and all Committee Members and staff were at home... The meeting had a completely different feel. Our chair said at the end – the meeting was far more conversational, more people got involved and it was much more interactive. Why can't we do this all the time?”

Committee Member

Summary: Reflections on the Bridging Divides strategy

- The original intention of Bridging Divides has remained the same since it was launched even though the wording of its aims and objectives has changed.
- Some staff felt that not enough time and resources were put into operationalising the strategy at an early stage, which has had a limiting effect on what has been delivered in its first two years.
- The Trust is working towards becoming a more relational funder with a more holistic support offer for funded organisations, whilst remaining high-volume. There is still some way to go to more fully achieve this ambition. This should remain an area of focus, because not actively focussing on embedding relational ways of working may affect the long-term success of the strategy and grantees' perceptions of the Trust.
- Exploring the suitability and potential of a 'grantee first' model may provide opportunities to further develop the Trust's approach to working with organisations in future.
- Bridging Divides is a high-level strategy which allows for flexibility, but COVID-19 has created a completely different context. The strategy may need to be reviewed to ensure that it remains the right framework to help the Trust respond appropriately to the crisis in the medium-long term.

3.2. Working for the Trust

Working culture has improved significantly

There has been a lot of work since the launch of Bridging Divides to get the staff team to full strength. There were several challenges experienced in the first year of the strategy, including a restructuring process and period of adjustment, which was discussed in our first annual review of Bridging Divides.

"If I'm really honest – during the review of staffing needs and the restructuring of staff, things got fairly bumpy."

Staff member

Since then the internal working culture at the Trust has improved significantly. In the last year, the team grew from 30 to 34 employees. Interviewees felt that having new people on the team at different levels has contributed to a **friendlier workplace environment**. This could be beneficial for the overall success of the work the Trust aims to do.

"When new people came, people were much kinder to each other, they were being more respectful and listened more."

Staff member

Another reason given for the improved working culture was that the Trust attracts good people to work with, many of whom have previously worked in the voluntary sector.

“The Trust attracts really high calibre people. They work well together and have a lot of respect for other team members. It’s really evident when you get to mix with team members.”

Committee Member

Team members can find the influence of the Corporation’s culture challenging

The Trust has a notably stronger corporate culture compared to many other organisations in the voluntary sector. This was something that staff have mixed feelings about. The Trust’s position within the City of London Corporation brings many opportunities, but also pressures, and a strong influence on culture within the Trust. Many of those working for the Trust have not come from a corporate background and there was a sense that the corporate aspects of team culture come from other departments within the City of London Corporation rather than from the team itself.

“That’s a challenge for people at the Trust, because we feel we shouldn’t be that corporate. It’s quite limiting having the pressures all the time from the corporation.”

Staff member

Many of those interviewed referred to a relatively **slow pace of making change** at the Trust and that they can feel like a ‘cog within a much bigger machine’ which creates a sense of frustration. However, many acknowledged the positives of having this position including being able to **take advantage of the networks and knowledge** that the City of London Corporation holds.

Supportive and light touch management, with some room for improvements

Many of those interviewed described that they feel **supported and trusted by the leadership team** to do the work they do. They felt they had ownership over specific tasks and could simply deal with those tasks in the ways they see fit.

“They genuinely value our insights, experience and expertise at the Trust. I feel really trusted.”

Staff member

However, this was not felt by everyone and some highlighted that the Trust could **improve in terms of delegating work** to ensure that staff members feel properly valued by the leadership team and line managers. Some felt they have more skills than are being utilised at the moment, which can feel discouraging. There is an appetite to contribute to tasks beyond their core role, to have the opportunity to use additional skills.

In addition to this, many of those interviewed felt they are **supported by the leadership team and line managers to grow within the organisation** and that there are many opportunities on offer to do so. Some feel that the ways you can grow within the Trust are quite unclear and not everyone knows about the existing opportunities. Growing within the organisation often relies on the individual to take action and is not always a supported journey, which might exclude individuals without the ‘right drive’.

"There are so many opportunities available when working here if you have the right drive and the right personality – if you do you can shape your own future. But I think there are barriers for people from certain backgrounds, or certain personality types – because the way you can grow and do things is quite intangible and subtle. It's not always officially stated."

Staff member

Some interviewees referenced that the management processes at the Trust are generally 'light touch'. This was often seen as something positive by those who enjoy this independent way of working, but there was also a recognition that this situation can be **challenging for those who might need more support** to thrive.

Internal communication has improved, but is still a work in progress

There was a perception in the interviews that **internal communication has improved in the second year** of Bridging Divides, but that it is still a work in progress. The **weekly "Stand Up" meetings** and the monthly update emails from the Chief Grants Officer were mentioned as **positive developments**. In addition to that, the **appointment of a communication lead** in April 2019 has significantly improved both internal and external communications.

Many of those who had been at the Trust for more than two years acknowledged that there has been a real shift in the way things are communicated today compared to before Bridging Divides. When the team was much smaller, everyone sat in the same office space and could easily and quickly share news about their projects. It was not necessarily formalised, but everyone knew what was going on. Now, with a much larger workforce and with people working flexibly or part-time, structured internal communication processes have become more important.

There is an appetite for even small decisions to be communicated internally, and to tackle the perceived **unwillingness amongst staff and management to communicate** about their projects. This is something that seems to put itself in opposition with the ambitions of Bridging Divides.

"There's a culture at CBT of holding onto projects as your own. There's a feeling that the minute you start communicating the project, it's like letting go of it. I don't agree with that. People don't value communicating what they're working on."

Staff member

Everyone has a role to play to improve internal communications, however, some of those interviewed believe that **the senior leadership team could do more to create an atmosphere where staff feel comfortable and encouraged to communicate** things themselves.

Summary: Working for the Trust

- The internal working culture at the Trust has significantly improved since our last review.
- The Trust's culture is inevitably affected by the Corporation's more corporate culture. The team can find this culture challenging to work within, although they recognise the benefits that the relationship with the Corporation offers.
- Staff generally feel supported and trusted by leadership team, however, there is an appetite for more delegated work and more structured support for those who need it.
- In the past year, improvements to internal communications have included the stand-up meetings and monthly emails from the Chief Grants Officer. Some would like further steps to be taken to create an atmosphere where internal communications happen more easily.

3.3. The Committee and governance

Changes to the Trust's Committee have been positive

There have been some significant changes to the Committee in the past year. Two new co-opted members have been appointed, meetings have taken place more frequently and the Committee now only review applications that are worth more than £100K. This has simplified the decision-making process and is seen as a positive by Members.

"It feels like Committee processes have been improved – better information, more efficient meetings, and good teamwork with the officer team."

Committee Member

The co-opted Members have helped Committee to become more diverse and better represent London's communities. One of our interviewees highlighted that the presence of the new Members has helped to spark different sorts of debate at Committee meetings.

Further changes to the governance structure are expected in the coming year, following the review of Bridge House Estate assets. It is hoped that these developments will help to put co-opted Members 'on a more equal footing' with elected members of Committee.

In the interviews, we asked whether Committee has changed their decision-making in the last year and whether they feel more willing to take risks. One interviewee said that there had been a shift and that the Committee is more comfortable today working with uncertainty and working more collaboratively with the team. Another highlighted that risk is still an important consideration, and that the Trust's approach must remain in line with the Corporation's requirements. In some cases this has proven to be a barrier for more progressive decisions.

“They’re willing to change, [there is a] willingness to take risks. But those risks – they need to be properly explained and introduced. Committee is not going to act on blind faith without really having a proper explanation of how we’d be doing that.”

Committee Member

Summary: The Committee and governance

- This year has seen some significant changes to the Trust’s governance structure, which has been well received by Committee Members and staff.
- There are still some changes to come, which it is hoped will put the co-opted Members on a more equal footing to the other Members of Committee.
- These changes are important for the implementation of the strategy. It may be helpful to assess the impact of these changes going forward on Committee’s decision-making and risk appetite to encourage learning.

3.4. Values

We asked staff and Committee Members alike about their thoughts on City Bridge Trust’s progress towards the seven pillars of the Bridging Divides strategy. One of these pillars is the Trust’s values. The following six values were adopted in the second year of Bridging Divides:

The Trust aims to be:

- Inclusive
- Representative
- Environmentally Responsible
- Collaborative
- Adaptive
- Progressive

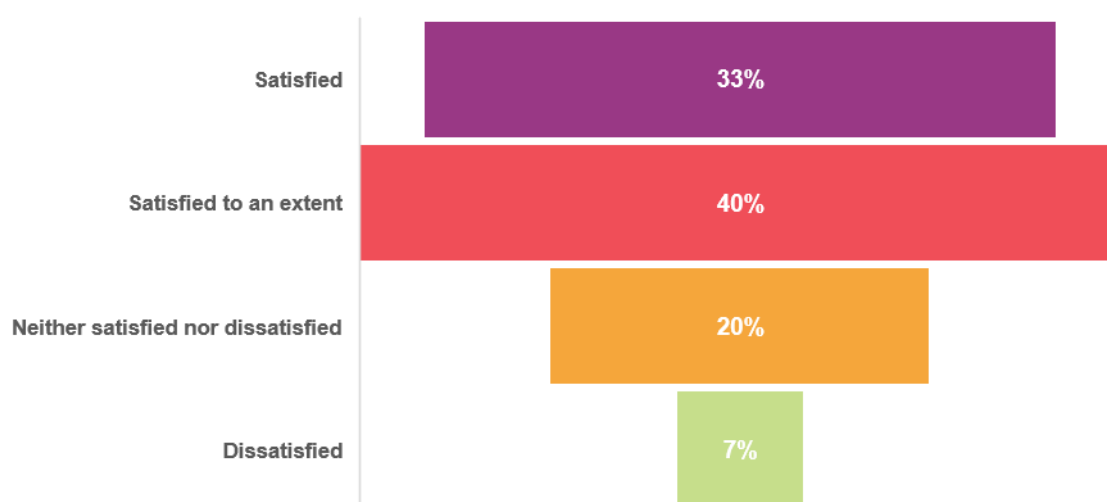
"In the overall journey, we're at the beginning of it but we couldn't have done more than what we've done. We've done everything we could've done in the time we've had. We're 100% of what we could've done so far, but 25% of the full journey."

Staff member

There is positivity about the Trust's progress towards implementing its values

Of those who responded to the most recent survey, 33% said that they were satisfied with the Trust's work towards living its values and 40% said that they were satisfied to an extent. The results suggest most people agree that progress has been made towards living the values in practice, and that there is an appreciation that the process takes time.

Chart 1 How satisfied are you with CBT's work towards living our values? (n=15)



When asked about the Trust's progress towards the seven pillars, every interviewee mentioned City Bridge Trust's values and the work they have been doing towards the values. Their response was largely positive. Staff members identified that the Trust had moved along in the journey towards becoming a values-led organisation, and there was recognition across the team that the values are an ongoing commitment and are likely to continually evolve.

"[There is] always going to be a way to go, always room for improvement. We've done a lot of work on the values and that's led to us resetting the values a bit... That's been really good and healthy."

Staff member

The values working group has made good progress...

The values working group was a good opportunity to embed the values within the Trust's working culture. There has been strong engagement and awareness from the team about the values and over the past few months there have been several values workshops and sessions. These sessions have been useful to allow those who are not part of the values working group to contribute what the values mean to them. However, some interviewees raised concerns that the work completed by the values working group would not be recognised as belonging to the whole team.

"I am really keen for us to get more people involved in this, the mere act of doing the work. Potentially, some feel that values work isn't their work. That's why I feel strongly that everyone should be involved."

Staff member

... However, barriers remain to further engagement from the wider team

One barrier is a lack of time and capacity for staff to engage in the progression of the values work, despite wanting to be involved. In particular, one interviewee highlighted that leading an area of the values work could lead to them having less time to fulfil grant making and other core responsibilities. This type of development work is always going to require some commitment from the margins of team members' core roles.

"I think concern about overcommitting one's time is a big factor stopping many team members from getting more involved or stepping up to lead on things, and therefore means we are achieving less than we might!"

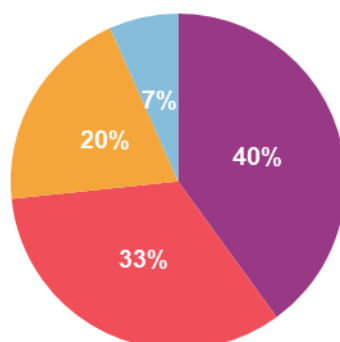
Staff survey response

The values motivate the majority of the team in their roles

73% of respondents to the staff survey agreed or strongly agreed that the Trust's values work motivates them in their role.

Chart 2 CBT values work motivates me in role (n = 15)

■ Strongly agree ■ Agree ■ Neither agree nor disagree ■ Disagree ■ Strongly disagree



There has been less progress in implementing some values than others

There was a mixed response when we asked staff the extent to which they agreed that the Trust is aiming towards each of the values. 94% of respondents agreed or strongly agreed that the Trust is aiming to be adaptive. However, **there was less confidence that the Trust is aiming to be ‘environmentally responsible’ and ‘representative’**: 40% neither agreed nor disagreed and 47% neither agreed nor disagreed or strongly disagreed, respectively.

For a more detailed analysis of each value, please refer to **Appendix 1**.

Living the values during COVID-19

Globally, the COVID-19 pandemic has been a catalyst for unique challenges for people and society. More than ever, it is essential that the Trust demonstrates how it is living its values to support civil society in London, to overcome the difficulties COVID-19 has presented. The Trust recently published an article to describe how it has adapted its approach including: responding to needs quickly; actively seeking the involvement of London’s communities and voluntary sector; and reducing the burden of comprehensive reporting requirements on grantees.⁸

“Staying true to our values at a time like this is incredibly important. We recently adopted six new values: Progressive, Adaptive, Collaborative, Inclusive, Environmentally [Responsible] and Representative, and now is the time to make sure we are truly living them.”

City Bridge Trust website

Summary: Values

- 73% of staff are motivated by the values in their day-to-day work and staff are generally positive towards the work that has been done on values. This suggests that it may be possible to maintain existing engagement with the values and prioritise other parts of the strategy in the coming year.
- Overall, some of the values were viewed as more thoroughly implemented than others, including ‘adaptive’ and ‘collaborative’. This result may have been influenced by the current COVID-19 situation.
- Staff members tended to speak about the ‘representative’ and ‘inclusive’ values as if they were interchangeable. This suggests there is some work to be done to clarify the differences and explain what they mean for the Trust (see Appendix 1).
- There may be a risk that the Environmentally Responsible value is de-prioritised due to the effects of the COVID-19 crisis (see Appendix 1).

⁸ City Bridge Trust, Adaptive and Responsive: Our Aim Right Now (27 March 2020). Retrieved from: <https://www.citybridgetrust.org.uk/living-our-values-during-covid-19/>, 6 May 2020.

3.5. The Trust as a learning organisation

A commitment to becoming a learning organisation is one of the key ambitions of Bridging Divides. In October 2019, we produced a report summarising the key findings of a short staff survey to help the Trust shape its approach to impact and learning.⁹ This section will include a comparison of the findings from the previous staff survey and our most recent findings from the staff survey and interviews undertaken in March and April 2020.¹⁰ The purpose of this is to:

- Understand staff perceptions of the Trust's current learning culture;
- Review any barriers to learning and how the Trust can overcome these barriers;
- Reflect on the Impact and Learning strategy.

Staff perceptions of the Trust's current learning culture

The Trust is further along in its journey to becoming a Learning Organisation compared to October 2019

City Bridge Trust uses 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'^{11 12}

In both surveys, staff were asked to rate where they felt the Trust was on its journey to becoming a Learning Organisation, on a scale of 1 to 100. **The mean score was 35.3 in the October survey, compared to 51.7 in the more recent staff survey.** In the most recent staff survey, 60% rated the Trust as between 50-74 on the scale, compared to 25% in the earlier staff survey. In October, the majority of respondents felt that the Trust was less than halfway there (69% scored the Trust between 0-49), compared to 33% in March. This shows a significant improvement in the progress that staff feel has been made in a relatively short period between October 2019 and March 2020.

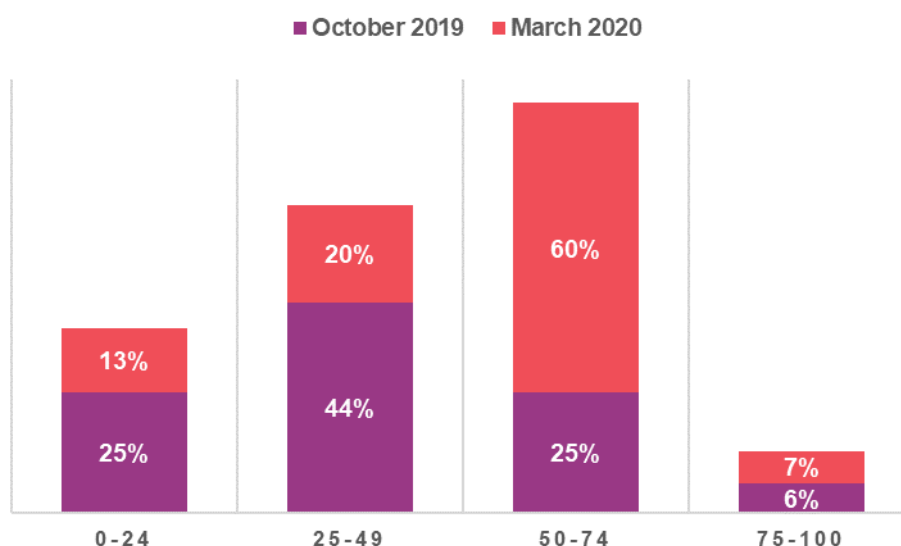
Chart 3 Where do you think the Trust is on its journey to becoming a Learning Organisation, scale 0-100

⁹ Renaisi, *Staff survey analysis: City Bridge Trust – Bridging Divides Learning Partner* (October 2019).

¹⁰ The staff survey attracted 16 responses in October, whereas our most recent survey attracted 15 out of a possible 34.

¹¹ Adapted from IVAR (2015) *Evaluation within UK Trusts and Foundations*, London: IVAR.

¹² The wording has slightly changed from the definition used in the October survey. Please refer to Renaisi's *Staff survey analysis: City Bridge Trust – Bridging Divides Learning Partner* (October 2019) for more information.



The October survey results suggested that most staff felt the Trust was at the start of its journey to becoming a Learning Organisation. The more recent responses suggest that although the Trust has not completed its journey, staff feel that it has made significant progress. It was apparent from the qualitative interviews that there was an appreciation that becoming a Learning Organisation would take time. Furthermore, there was an increased desire to be more learning focused across the team and as an organisation.

“It feels like a learning journey – positive changes are being made but not rushed and as an organisation it takes time to adapt to be an effective Learning Organisation.”

Staff survey response

Despite the largely positive response in the March survey, 33% of staff rated the Trust between 0 and 49 in its journey to becoming a Learning Organisation. The following section outlines staff feedback on City Bridge Trust as a Learning Organisation, including how learning is shared and what staff find beneficial.

‘Developing’ was the most common word used when describing the current learning culture

In both surveys, staff were encouraged to choose three words that they thought described the current learning culture at the Trust. Figure 1 shows that staff most commonly used **developing** (4) to describe the current organisational working culture. In the earlier survey, the most frequently used words were **potential** (3), **limited** (3) and **well-intentioned** (2).



Figure 1 Word cloud showing the words respondents used to describe the current learning culture at the Trust (Left – October 2019; Right – March 2020)

The table below shows the words from the March survey grouped together based on similarity.

Developing	Positive, inclusive	Inconsistent	Other
<ul style="list-style-type: none"> Developing Journey Growing Aspirational Improving Beginning Desire Gaining pace Embryonic Optimistic Encouraging High potential Taken at a sensitive pace 	<ul style="list-style-type: none"> Positive Inclusive Open Appropriate Exciting Genuine Honest Time given for consultation and feedback Sincere 	<ul style="list-style-type: none"> Inconsistent Random Bit of a struggle Unclear Underhanded Unscientific Over-done Tick-box Over reliant on observational statistics 	<ul style="list-style-type: none"> Requires more leadership New Theory-driven

Some staff respondents gave additional comments to explain the words that they chose. We used these reflections and comments from the staff interviews to develop some themes on perceptions of the organisational learning culture.

The Trust has improved its learning culture thanks in part to the values work and regular team meetings

Overall, most people we spoke to identified that becoming a Learning Organisation is a continuous and non-linear process. The overarching view was that there had been lots of progress and a cultural shift in the organisation. This was attributed to the values work and

regular team meetings, which have also had an impact on team working culture in general.

“Lots of good progress and a cultural shift supported in no small part through the values work. Feel like we are in a much better place to become a Learning Organisation now.”

Staff survey respondent

Some team members felt **there has been significant focus on internal learning and sharing**, and have a **desire to now focus some of the learning externally**. The new Data Analyst position was considered as an encouraging step towards developing as a Learning Organisation that could share learning externally.

“... I feel that a lot of discussion has focused on what we all think and feel internally, which is important, but I guess learning is about being outward focused too...”

Staff survey respondent

There is a willingness and openness to learning, but there is still work to do to fully embed a learning culture

There is an ambition and motivation within the team to engage with and contribute to a learning culture. Some newer team members reported that the Trust's learning culture had been emphasised from their first day and continually. They sensed that the team and wider establishment had a positive approach to becoming a Learning Organisation.

“There is much enthusiasm about the work and a fairly large group of people who really engage.”

Staff survey respondent

Some team members felt there had been **a shift in the learning environment and that it has become more egalitarian**. Senior members of staff were described as receptive and open to suggestions. The increase in regular learning opportunities has contributed to an inclusive workplace environment.

“I think it's really good, people seem to be open to making suggestions privately or publicly in team meetings, pretty good environment.”

Staff member

It is **important that the Trust's learning culture recognises varying learning styles and preferences**, and values different methods and sources of learning to ensure inclusivity.

"There are going to be more and less appropriate ways to learn as an organisation, but it will be barrier if we're not open to non-traditional ways to learning."

Staff member

Weekly meetings and shadowing opportunities are helping to improve learning

Interviewees felt that teams were not working in silo as they have sometimes been previously. There has been an **increase in open and rich dialogues through the implementation of weekly "Stand Up" meetings, Microsoft Teams, and shadowing opportunities**. Funding officers draw on the experience and acquire learning through being involved in the funding manager monthly meetings and subsequently have a more informed view of what the Trust does and how it works.

"I pick up and learn a lot from funding managers in their monthly meetings, it is amazing the level of knowledge you pick up from those meetings..."

Staff member

Interviewees felt that this shadowing approach to support learning would also be helpful for funding managers, especially in their first few months of employment, and that existing shadowing opportunities should be extended as a valuable way to draw on the knowledge that exists within the organisation.

Summary: Staff perceptions of the Trust's current learning culture

- There has been a significant improvement in how staff assessed the Trust as a Learning Organisation since the last survey in October 2019.
- Nonetheless, the Trust still has some way to go on this journey. There is an enthusiasm and willingness amongst the team to support this work.
- More could be done to embed and formalise learning opportunities within the team, for example through more structured shadowing opportunities.
- There is an appetite to develop more outwardly-focused learning for external audiences.

Barriers to learning

More formalised processes are needed to ensure that learning is embedded

Some interviewees pointed to structural barriers to implementing a learning culture, notably a lack of framework or formalised processes to ensure that learning is embedded.

"Everyone wants to do it, but there's no joined-up way at the moment. Not a cultural issue, but more structural."

Staff member

Creating an Impact and Learning working group that works closely with the Impact and Learning team may be a helpful way of developing this structure for the team, modelled on the values working group. However, this would require time formally set aside as part of their wider role.

“Regular learning opportunities are contributing to a much more open workplace environment - though believe there is still a way to go...”

Staff survey respondent

Staff can find accessing professional development training difficult

Some staff members expressed difficulty in accessing professional development training opportunities. There seemed to be a **lack of clarity and transparency around budget for training** and the **procedure for requesting continued professional development training**. We learned in the interviews that there were plans in place to allocate an amount of spend for each staff member to access personal development. It was hoped that this would create a culture where staff are willing and able to take responsibility for their own personal development, and that this would contribute to the Trust’s learning culture.

"I have found it personally quite hard to get agreement for personal training things I want to do. There’s a budget for personal development, but when I’ve asked to go for a course, I haven’t been told no directly, but no in other ways. Now I feel I can’t really ask. It knocked my confidence to ask for training."

Staff member

Enablers to learning

Interviewees emphasised that some of the actions needed to help them more effectively learn and apply learning in their work include:

- Explicit encouragement to engage with learning opportunities;
- More involvement in planning and setting programmes and priorities;
- Space to work with others collaboratively e.g. team courses, away days, better use of the Teams wiki;
- Building a reflective space and time to acknowledge and share learning;

- Better use of internal data and third-party data sets.

Summary: Barriers to learning

- Whilst there is an enthusiasm to help develop the Trust's learning culture, structures and processes need to be put in place to ensure learning is embedded in the team.
- A working group that works closely with the Co-Heads of Impact and Learning could help to further develop and embed the Trust's learning culture.
- Greater clarity is needed around professional development training, which could be mitigated by providing blueprints for what types of training staff can access.

Reflections on the Impact and Learning strategy

The following section will give a brief overview of staff members' understanding of the Trust's Impact and Learning strategy, based on feedback from the interviews and survey. A more extensive set of reflections and comments on the Impact and Learning strategy can be found in our update report.¹³

The creation of the Head of Impact and Learning role has been a positive addition to the team

The dedicated Impact and Learning team has been significant in supporting the Trust to embed learning as part of the culture.

".... I think having the role of the co-Heads of Impact and Learning has been welcomed and has made significant change. They help us to begin to embed learning into our culture – that's a change. Thinking about how we can be better and what's changed in this strategy."

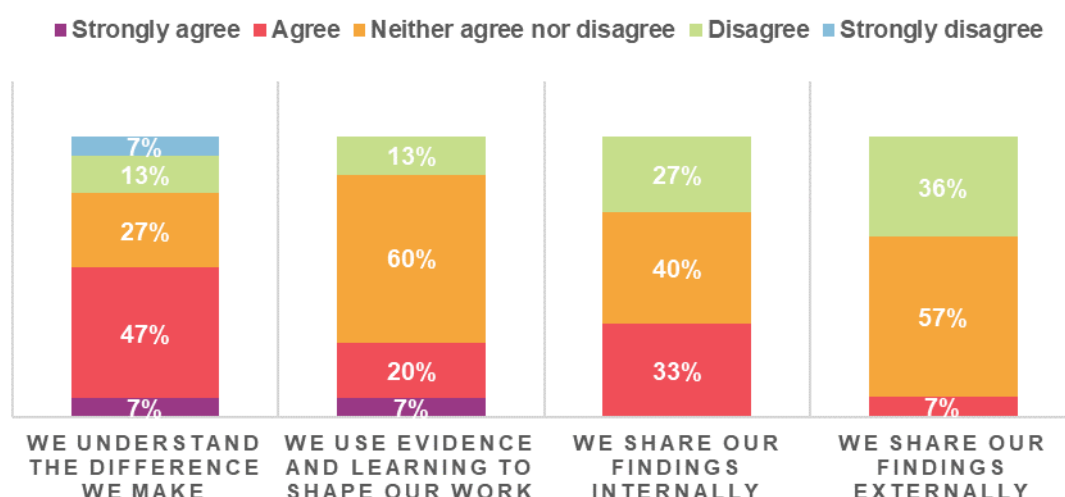
Staff member

The Trust is better at using learning internally than sharing it externally

In the staff survey, respondents were asked to tell us the extent to which they agreed with a set of statements related to Impact and Learning. 'We understand the difference we make' received the most positive response: 54% agreed or strongly agreed. By contrast, only 7% agreed with the statement 'we share our findings externally'.

¹³ Renaisi, *Bridging Divides: Update Report – Update on progress and brief reflections on the Impact and Learning strategy* (February 2020).

Chart 4 To what extent do you agree with the following statements:



"I think we've become better at sharing our findings internally, though this is still patchy. I feel we don't do very much at all to share our findings externally."

Staff survey response

Some of the statements received a fairly neutral response, including 'We use evidence and learning to shape our work', 'We share our findings internally' and 'We share our findings externally' (60%, 40% and 57% neither agreed nor disagreed respectively). This suggests that team members may not be aware of how the organisation is achieving these goals.

"I honestly don't know right now, need more evidence of how this is being done."

Staff survey response

The process of producing the Impact and Learning strategy has been necessarily quite inward-focused. The coming year presents an opportunity to produce tangible outputs that will help to share the Trust's learning externally.

Staff feel the Trust is not making enough use of the data it holds to understand impact

Many of the staff felt that there is a **good and open culture to discuss learning**. The learning visits were recognised as one way that staff members learn more about grantees' experience and what difference is made through the Trust's funding. Some staff acknowledge that the Trust is in a **process of understanding what is done well and where the gaps lie**, with the aim of addressing those gaps. However, some feel that the Trust **does not make sufficient use of data to understand the impact achieved in relation to funding**.

"We frequently lack the basis for meaningful comparison to see if we could achieve more effective impact by funding certain approaches and not others."

Staff survey respondent

For instance, one staff member highlighted that information from learning visits is not stored in a way that is accessible or tracked alongside findings from other learning visits. This prevents the Trust and team members from identifying trends.

"When I come back from the visits and I have [these] sort of nuggets of useful information from groups that doesn't fit into the report, I don't necessarily have anywhere I could put it..."

Staff member

Summary: Reflections on the Impact and Learning strategy

- The Trust is currently better at sharing learning internally than externally. There is an appetite to produce more learning for an external audience.
- The Trust could do more to use the data that it already holds on grantees. The recent appointment of a Data Analyst is a positive step towards making better use of this data.
- There is an appetite for the team to have access to more structured information and data about grantees' impact and other trends, which the Data Analyst could help to put in place

3.6. Other pillars of the Bridging Divides strategy

What CBT funds

In our first annual review, we highlighted the challenge of a backlog of applications received in the first few months of Bridging Divides. In the past year the team has worked through the backlog and have developed new ways of working, for example working in smaller groups to assess the applications.

However, due to the current COVID-19 crisis the Trust is experiencing another backlog and has temporarily closed many of its funding programmes to new applicants. Instead, time is being spent on the London Community Response Fund, the COVID-19 small organisations emergency support and to support existing grantees through these challenging times.

Staff feel proud of the prolongation of the 3-year programme to 5 years under Bridging Divides. However, the Trust's implementation of a core funding offer has been slower than planned and is currently under review.

"Core funding is still really bad. The way we created the core funding in a way that's not possible for most organisations to get the funding."

Staff member

The Trust is currently developing a pilot to trial a new core funding offer which would look to support the operational stability and longer-term sustainability of current grantees using a more relational approach.

Some feel the Trust is not diverse enough in terms of which organisation it funds. Many previous grantees tend to receive funding again, which could exclude groups that are very much in need of the Trust's support. **An analysis of grant recipients in comparison to the total charity sector in London** may help to investigate this point further.

CBT's Toolbox and funder plus support

Overall, staff were positive about the development of the Trust's funder plus support and felt this was an exciting thing to share with grantees.

"I'm proud to talk about it when visiting organisations. It's a real extra feather in my hat. To refer organisations to that is what I'm most excited about! Makes me want to stay at CBT."

Staff member

It is important that the Trust is clear on what they offer and how they offer extra support to grantees, to ensure that they reach those who might need it the most.

"It's fair to say that it's easier for some organisations to take [up] opportunities of things we share. There's definitely work we can do around comms, marketing, and sharing opportunities. This will be a focus of our work into year three and there's a real ambition to change and a wish to change now."

Summary: Other pillars of the Bridging Divides strategy

- The core elements of what the Trust funds, the Funder Plus offer and the wider 'toolbox' of support have been developed and are now embedded in the Trust's approach. This has meant that there has been progressively less emphasis on these areas of the strategy in the second year of Bridging Divides.
- Staff are generally excited about the Funder Plus support, but are sometimes unclear about what the offer comprises.
- The core funding offer needs to be clarified and re-launched.
- There is an appetite for the Trust to review whether it is reaching all groups that are in need of support.
- Regular feedback from grantees will help to ensure that the funder plus offer helps to address their priority needs effectively.

4. Year 3 and onwards

The Trust is now operating in a very different context to that of the first two years of Bridging Divides. Society has changed dramatically, almost overnight. The COVID-19 crisis has led to the charity and community sector in London facing twin pressures, intensifying challenges that were already being felt by many: the pressure of surging demand and need amongst London's communities, as well as the financial pressure of a major economic shock that is likely to slide into recession. Charitable organisations that earn a substantial portion of their income from community fundraising (such as sponsorship events) and/or trading activities (such as venue hire) will be particularly hard hit.

This has major implications for City Bridge Trust, as the largest independent charitable funder of London's charity and community sector, and for its Bridging Divides strategy. Bridging Divides was not designed or imagined for the context we are now living in. The core values and ambitions embodied in the strategy may still be relevant and desirable, but how they are implemented, and what the Trust needs to do to achieve them, will now have to be different. **There is a risk that, without review, Bridging Divides becomes a poor guide for the Trust's work and decision-making in the remaining months of 2020 and beyond.**

Learning from this report

Given the timing and scope of this report – at the early stages of the crisis, covering the full financial year – we cannot provide a complete assessment of the impact of COVID-19 on Bridging Divides, and what the Trust should do next. However, we can use the learning highlighted in this report to provide a partial guide to factors that seem important in this new context:

- **Adaptation:** The Trust's ambition to be adaptive is now more important than ever. It is also important for funded organisations, and there may be a role for the Trust to play in helping others to adapt.

- **Values:** These are now reasonably embedded internally, but could have a significant role to inform decision making on how to support the sector and what issues should be prioritised for funding.
- **What to fund:** There has been less focus on this pillar of the strategy this year, as the Trust's funding programmes, Funder Plus and toolbox support have become established. However, there is now a renewed focus on this area of work. Decision making about what to fund and how to prioritise funding is likely to become even more significant in the coming months.
- **Inclusion and representation:** Given the unequal impacts of the COVID-19 crisis on London's communities, the Trust's inclusion and representation values (and questions of inequality and fairness in general) are likely to become even more important.
- **Learning:** To date, there has been a greater focus on embedding internal learning at the Trust, but sharing learning externally is likely to become higher priority.
- **Toolbox and Funder Plus support:** Although these pillars of the strategy have not received much focus in this report, this holistic support for funded organisations is now even more essential but may need revising to respond effectively to the new COVID-19 context.

Adaptations to Bridging Divides

Some areas of the strategy remain as relevant as ever, however some pillars may require refinement or adaptation to ensure that they respond to a rapidly changing context.

Broadly, we feel that the following pillars of the strategy remain relevant and do not need to be refined:

- Vision and Mission
- Values
- The ambition to learn and adapt

However, the following pillars may benefit from refinement to ensure that they remain relevant:

- What we fund – ensuring that the Trust's funding priorities remain responsive to rapidly changing needs
- Funder Plus – ensuring that the Trust's wider support offer is still appropriate, and that the type of support and advice that organisations need to respond to COVID-19 is available

- CBT's Toolbox – to ensure that the types of funding available is appropriate and can adapt to changing needs in the sector; and that additional opportunities like access to philanthropic networks remain appropriate, and any new opportunities that arise from the crisis can be taken advantage of
- Defining success – the Trust may want to revisit what success might look like in the new context

Any process of adapting Bridging Divides would not need to take place immediately, especially given the Trust's current focus on its COVID-19 emergency response. It could be designed alongside a reflection process to help the team take stock of the changes that have happened since March 2020, and identify ways that they want to continue or change work in future.

5. Recommendations

1. We recommend that CBT designs a process to **formally review and adapt the Bridging Divides strategy** to ensure that it remains relevant in the new COVID-19 context.
2. We recommend that CBT **reviews its Funder Plus and Toolbox support offer** to ensure that these continue to address the highest priority needs of the sector, given the impact of COVID-19 and a rapidly changing context.
3. We recommend that CBT **conducts an analysis to compare the organisations and sectors it supports with London's wider community sector** to identify how far CBT is funding a representative group of organisations, using data from, for example, the Charity Commission and 360Giving. This analysis could be undertaken by the new Data Analyst.
4. We recommend that CBT **explores the extent to which having co-opted members have enabled a broader range of perspectives and experiences** to be taken into account in Committee discussions and decision-making. This reflection process could be supported by the co-Heads of Impact and Learning.
5. We recommend that the Trust **ensures that internal learning and development capacity is focused proportionately on the most significant areas of the strategy** in the new context, notably on 'what CBT funds' and Funder Plus. This could include:
 - a) **Continuing to capture learning about funded organisation's priorities in COVID-19** to inform any adjustments to Funder Plus support going forward (see recommendation 2). This could be done **using the analysis of support needs from the Community Response survey**;¹⁴
 - b) **Outlining the Funder Plus offer internally** to ensure all staff understand what is on offer, and updating this information for a COVID-19 context if necessary.
6. Recent changes have been made to the Trust's decision-making process, including smaller grant applications being approved by the Chief Grants Officer and Deputy Chief Grants Officer. We recommend that CBT reviews **whether any further changes are possible to its financial assessment processes** to speed up the decision making process even further.
 - a) We further recommend that the Trust **formally reviews and documents changes to its funding processes and decision-making that have**

¹⁴ Please refer to the email 'Community Response Survey' sent out to all of the Trust's staff on 5 May 2020.

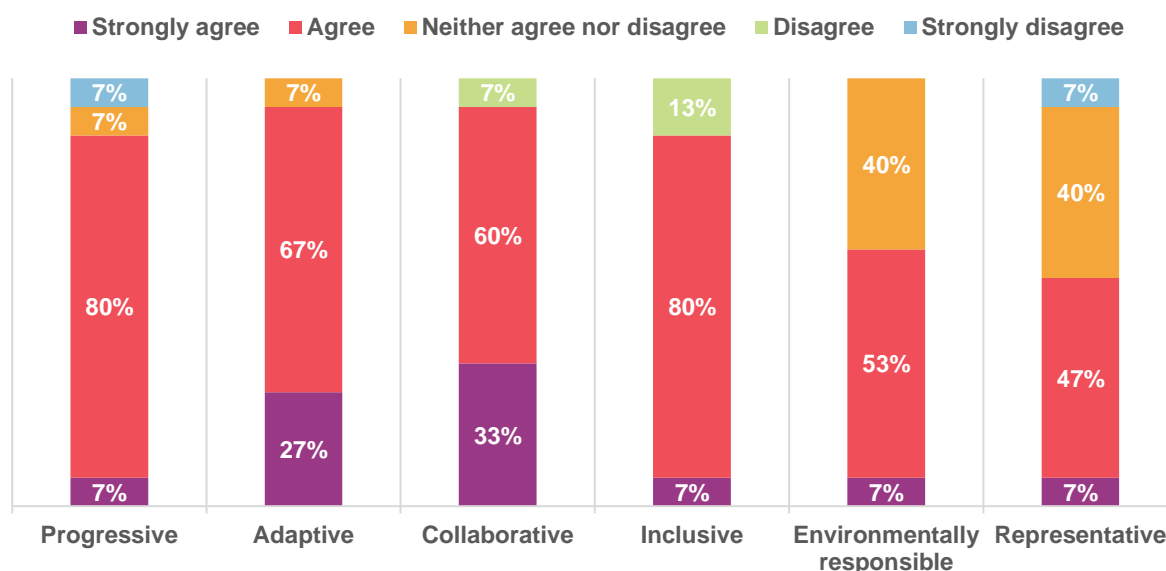
taken place due to COVID-19, publishes this review, and identifies what practices it wants to keep or change once the immediate crisis recedes.

7. The success of the work of implementing the **Trust's values** internally indicates that it may be possible to maintain existing engagement within the team, and prioritise other parts of the strategy in the coming year as priorities shift to respond to the new context. If it does want to continue embedding the values, we recommend that the Trust focus on the following:
 - a. We suggest that the Trust **refines and clarifies the definitions of 'inclusive' and 'representative'** so that team members understand the distinction. In this review, many of those interviewed used the two terms interchangeably.
 - b. We recommend that CBT creates a dedicated **environmental working group** to ensure that further progress is made on implementing this value.
 - c. Team members felt that the Trust is highly collaborative with partners, but less so with the organisations it funds. **We recommend that CBT considers a specific project or programme to provide structure to its collaboration with grantees**, for example by trialling a participatory grant-making programme.
8. We recommend that CBT creates a **blueprint for what types of training staff can access** and when they can be accessed, to ensure that this process is seen as fair and accessible.
9. To further embed the Trust's learning culture we recommend that CBT **creates an Impact and Learning working group** that works closely with the Impact and Learning team, with a similar role and scope as the values working group.
10. We recommend that the co-Heads of Impact and Learning focus their capacity on identifying **external learning priorities** and producing **learning outputs for an external audience**.
11. There is an appetite for the team to have access to more structured information and data about grantees' impact and other trends. We suggest that the Data Analyst develops a **regular internal data-sharing process** to inform the funding team's work.

Appendix 1: Values

This section summarises staff feedback on each of the values based on comments made in the staff survey and interviews.

Chart 5 To what extent do you agree that CBT is aiming to be... (n=15)



Adaptive

Survey respondents were most positive about the Trust's progress in implementing the 'adaptive' value. This is likely to have been influenced by the timing of the survey, in the midst of the Trust's rapid response to the COVID-19 crisis. Interviewees felt that this has shown how adaptive the Trust is in the way it supports organisations.

"We are currently demonstrating a hugely collaborative and adaptive approach through our response to the COVID-19 crisis."

Staff survey response

Some respondents felt that in normal circumstances the Trust might have been apprehensive about changes such as agile working and use of technology, but that the crisis presents an opportunity to adapt to new ways of working.

"Shows we are capable of it when necessity dictates but I think we would have been much too tentative about it without the impetus of COVID. It has shown what we are capable of when we put our minds to it."

Staff survey response

Collaborative

93% agreed or strongly agreed that the Trust is aiming to be collaborative. Similarly, the response to COVID-19 has given the Trust an opportunity to demonstrate how it can be

collaborative in the way it supports organisations across London, for example through its role in launching the LCRF emergency fund.

“In the current chaos of COVID-19 I feel CBT has worked very collaboratively with others to deliver support to communities impacted by the crisis.”

Staff survey response

Generally, staff members feel that the Trust is collaborative with other partners in the sector, and the LocalMotion partnership was given as one example. However, some felt that there is room to improve collaboration with grantee organisations. There is an appetite for the Trust to try more experimental work, such as trialling a participatory grantmaking programme.

“I think we are still often very risk averse in terms of taking a collaborative approach with grantee organisations.”

Staff survey response

Internally, team members mentioned that they had adapted in their ways of working to enable them to be more collaborative. This includes the implementation of hot-desking. However, more junior members of the team are not always aware of the collaborative work that is happening at a more strategic level.

“Again, probably above me, I know we are collaborative - we have a few funds where we work with others....”

Staff member

Representative and Inclusive – separate values but not strongly differentiated

Respondents to the survey did not differentiate between these two values in their comments in the survey, and interviewees tended to talk about both interchangeably. We therefore discuss both values together in this section.

Despite this, survey respondents felt that more progress had been made towards implementing the ‘inclusive’ value: 87% of respondents agreed or strongly agreed that the Trust was aiming to be ‘inclusive’, compared to 53% for ‘representative’. It was not clear why there was a difference in the way respondents rated the Trust’s achievements of these values, despite talking about them in similar terms in the comments. It is possible that respondents associate ‘representative’ with recruitment and the Trust’s own team, whilst they see ‘inclusive’ as more about including people in decision-making, though we cannot be certain of this.

We were given some examples of these values in action, and some areas for the Trust to develop.

“I feel the hard work we've put into developing the values, particularly in an inclusive way, means we are now stronger and better placed to communicate better and work in more collaborative way.”

Staff survey response

Some interviewees referenced the review of recruitment processes to attract more diverse candidates, for example working with a recruitment agency specifically for minority groups. Nonetheless, they felt that there has been a lack of progress in making changes.

Some staff felt that more could be done to engage with community members to be more inclusive of the communities which the Trust serves. It was a concern that there is a lack of diversity within the team, and therefore little lived experience of the issues that communities the Trust serves face. However, co-opting two new members of Committee was felt to be a positive.

“They're all elected members, so we don't necessarily have control over that. I know there's been two co-opted members in order to try and get some of that [diversity].”

Staff member

Progressive

87% of survey respondents agreed that the Trust is aiming to be progressive. Positive steps include commissioning some research looking at the needs of the trans community and how the Trust can convene a network of funders to support trans people in London.

“... for such a traditional organisation, it's interesting how well-placed CBT is to do some fairly radical things. CBT is looking out for the needs of Londoners and taking bold steps to make sure we can bridge the gaps for Londoners.”

Committee Member

The Trust has to work within the constraints of its relationship with the City of London Corporation, which some interviewees felt can make being progressive more challenging. One of these constraints is lengthy financial processes which make application assessments more complicated. There was an expectation that changes to delegated authority would mean smaller grant applicants could receive decisions quicker, however this has not always happened in reality.

“[We are] progressive and open, but the processes we have to follow are the corporation processes. Difficult to get out of using those processes.”

Staff member

Environmentally responsible

Interviewees had little to say on the extent to which the Trust is aiming to be **environmentally responsible**. 40% of survey respondents neither agreed nor disagreed that the Trust is aiming to be environmentally responsible, which perhaps suggests a degree of ambiguity. This may have been influenced by the timing of the survey: COVID-19 has perhaps pushed the climate emergency agenda to a second place issue. It is also possible that there is a sense that the Trust could do more and be more proactive on this issue. The development of an environmental working group is one way the Trust could build on its progress here.

“Care for the environment - we’re not too bad, we could be better.”

Staff member