

Committee: Funding Committee of the Bridge House Estates Board	Date: 11 September 2023
Subject: End-to-End Review of CBF's Main Grant-making Programme	Public
Report of: Sacha Rose-Smith, Chief Funding Director	For Information
Report Author: Julia Mirkin, End-to-End Review Project Manager	

Summary

To support the Funding Committee in the discharge of its duties, this report provides an update on the End-to-End Review of City Bridge Trust's main grant-making programme.

Recommendations

It is recommended that the Funding Committee, in discharge of functions for the City Corporation as Trustee of Bridge House Estates (charity reg. no. 1035628) and solely in the charity's best interests:

1. Note the contents of the report.

Main Report

Background

1. Further to the Chief Funding Director's report to the Funding Committee on the 12 June, the End-to-End Review commenced on the 19 June 2023. The End-to-End review is being delivered in parallel with the Chief Funding Director's work on the Proposed Future Direction of Travel, more details about which can be found in these papers. Whereas the proposed Future Direction of Travel focuses on CBT's funding strategy i.e., what CBT will fund, the End-to-End review focuses on our grant-making practice, i.e., how we undertake our funding activity. These are different but intrinsically connected workstreams and every effort is being made to ensure that all possible connections are being identified and explored to ensure the development of a coherent and effective review of CBT's grant-making activity.

Project Plan

2. A project plan for the End-to-End review has been created, which guides the work towards its conclusion, which will be the presentation of recommendations to this Committee on the 10 June 2024 about the development of CBT's main, responsive grant-making programme.

Internal and External Consultation

3. Two staff consultation groups have been established to support the development of the recommendations that will be brought to this Committee. The first, the Core Group, comprises colleagues who engage directly with grant-making through their work. This group will meet monthly from September 2023 until February 2024. The second staff group is an Advisory Group, comprising colleagues who have broader roles within Bridge House Estates. The role of this group will be to bring a broader

organisational perspective to the principles behind our funding work. The Advisory group will meet three times between November 2023 and March 2024.

4. A consultancy brief has gone out to tender for work that engages with both successful and unsuccessful applicants to CBT. Other elements of the brief are a mapping of funding opportunities in London; the delivery of focus group session with applicants to CBT and engagement with CBT's Equity Partners on the draft recommendations for this Committee. It is felt that using consultants for this external engagement work will engender the most honest feedback from past applicants and our Equity Partners. It is also consistent with the approach adopted for the Small Grants review.

Researching the Practice of Other Funders

5. Work to review the practice of other funders is underway, and useful conversations have been had with the Coop Foundation, John Ellerman Foundation, Lloyds Bank Foundation, The National Lottery Community Fund, the A B Foundation, the Paul Hamlyn Foundation and Esmée Fairbairn Foundation.
6. These meetings have covered pre-application support, due diligence, common rejection reasons, managing risk, engagement with unsuccessful groups, grant monitoring and management, portfolio sizes and continuation funding.
7. Learning points, based on anecdotal evidence, are that many funders are now operating at least a two-stage application process to minimise the time taken for those that are declined early in the application process. Different practices are adopted for different funds within funding programmes, recognising that more strategic funding requires more staff time and targeted work requires tailored approaches. There is a shift away from grant monitoring and towards relationship management, reflecting the move towards trust-based or relational funding practices. Finally, funders are offering more core and unrestricted funding. This raises new challenges, especially for attributing and measuring the impact of funding awarded, which will be a central line of enquiry addressed through the End-to-End review and the Proposed Future Funding Direction.

Grant Agreement

8. Work to revise the Grant Agreement has also commenced, with the aim of simplifying the document, making it more user friendly and reflecting the values and progressive tone of the charity's new brand. This work is being supported by the Strategy and Governance team, namely by the Policy & Projects Officer, Joaquim Freitas, who was formerly a Funding Officer with the Funding team. It is very much hoped that this element of the End-to-End review can also support the development of the Small Grants funding agreement and potentially be used by colleagues in the Corporate Charities Funding Unit.

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