

## Review of CBT Business Plan Progress - April 2013 - January 2014

KPI	Description	Date/Target	Progress	Status
<b>Objective 1 - Grant Making - to agree, implement and promote our new grants programmes</b>				
1	Conclude assessment of all applications received on Working with Londoners	Jan-14	Notice of the closure of the Working with Londoners programmes was given on 21st June 2013, with a final submission deadline of 5th July 2013 for those already working on applications. 71 applications were received in the period 1st - 5th July 2013. It had been anticipated that decisions on all these would be completed by the January 2014 Committee meeting. Whilst this is the case for the majority of these applications, in some instances additional information was required in order to complete the assessment, leading to some slippage in the timetable. At the time of writing this, 9 applications remained pending, of which 5 are recommended for a grant at the February 2014 Committee meeting. It is anticipated that the remaining 4 will be brought to the March 2014 Committee meeting.	A
2	Launch new Grants Programmes	Target - to launch between August and October 2013	The new Investing in Londoners programmes were 'soft-launched' on 26th September 2013. The London Youth Quality Mark Awards were launched on 30th October 2013 and the Arts Apprenticeships were launched on 18th November. Partnership arrangements with the Buttle Trust and Prisoners Abroad to establish hardship funds for individuals in need were approved in November 2013 and January 2014. Other closed programmes are due to be rolled out over the next 5 years.	G
<b>Objective 2 - Monitoring and Evaluation - to continue the development and implementation of our monitoring and evaluation systems</b>				
3	Maintain a high level of satisfaction from grant recipients.	Target - 95% satisfaction rating (ie good/very good).	On a random sample of recently received monitoring and evaluation reports, 82% rated their dealings with the Trust as 'very good'; and 16% as 'good' - giving an overall satisfaction rating of 98%. The annual programme of 70 monitoring visits is due to take place between November 2013 and March 2014. In addition, several Members of the Committee identified organisations they wished to visit. Some of these have been done whilst others are in the process of being arranged. Unannounced visits are due to be made to 25 organisations before 31st March 2014. Following the Quinquennial Review, the Committee agreed new monitoring and evaluation policies for our Investing in Londoners programmes due for implementation during 2014/15. A Stakeholder Perception study has been commissioned which is due to commence in February 2014.	G
<b>Objective 3 - Strategic Initiatives - to progress a programme of strategic and special initiatives</b>				
4	Milestones for Growing Localities and Wembley National Stadium Trust (WNST) achieved.	Target - Eight promotional films to be made with Growing Localities grantees in partnership with the Media Trust, over the summer of 2013. Decisions on the London-wide WNST grants to be made in June 2013. Two LB Brent grants rounds to be completed during 2013/14.	<b>Growing Localities:</b> Eight films were completed by September 2013. In addition, a Media Trust film, featuring Growing Localities grantees and narrated by Blue Peter presenter, Chris Collins, was broadcast on the Community Channel on 26th and 28th May 2013. Lemos & Crane have been commissioned to run the 'Growing Localities' Awards for a second year. 140 applications received, exceeding the target of 100. Judging is due to take place in March 2014. <b>Wembley National Stadium Trust:</b> The third grants round was launched in October 2013 (2 rounds benefitting Brent groups and one London-wide) which was over subscribed by 3x. Awards totalling £145k were approved by WNST Board in January 2014.	G

<b>Objective 5 - Corporate Philanthropy - to implement the CoL's Strategy on Philanthropy through a programme of activities under the "City Philanthropy - A Wealth of Opportunity" banner</b>				
5	Develop the 'City Philanthropy - a Wealth of Opportunity' website and other related activities.	Target - 1 headline article per month; 2 City Funding Network events held; 15 'Young Philanthropy' syndicates established by March 2014; 1 Beacon Fellowship Award for City Philanthropy event.	The website remains an essential and central hub for the various projects that are being undertaken under the 'City Philanthropy' banner. Three in-depth articles have been published on City Philanthropy so far during 2013/14, in the Evening Standard and the magazines City Wealth and Tempus, as well as a letter from the City Philanthropy Manager in the Evening Standard. The Telegraph ran an in-depth interview with Heather Rabbatts CBE in November 2013 who is due to receive the Freedom of the City in recognition of her charitable work. The interview took place at Charterhouse during the City Philanthropy Exhibition which was launched by the Lord Mayor at Charterhouse on 29th October 2013. The exhibition attracted widespread media interest, including news items on national TV and radio, as well as national press and social media. A book on City Philanthropy was launched at the same time. 150 attended the opening whilst attendance at the exhibition by the public has averaged 100 people a day. A complementary programme of events took place during November which draw in a further 440 visitors. The City Funding Network held its first event for 2013/14 in April 2013 at Charterhouse, where £23,000 was raised for 3 charities in just 11 minutes. The second event took place on 4th December and raised £32,000 for four charities. Young Philanthropy has established 18 syndicates within City firms which will invest approximately £108,000 during the year in a range of projects. A further 26 syndicates are due to launch in 2013 which will invest approximately £156,000. UK Community Foundations, which runs the Beacon Fellowship awards, has drawn up proposals for running the Beacon Award for a second time during 2014-16 which will be considered at the March 2014 Committee meeting, alongside proposals to build on the momentum of City Philanthropy and expand its activities.	G
<b>Objective 6 - Social Investment Strategy - to further the development and implementation of our approach to social investment and social financing of the third sector</b>				
6	Develop and implement procedures for social investment analysis.	Target - Autumn 2013	The Court of Common Council approved criteria for social investment at its October 2012 meeting. Further criteria were agreed by the Social Investment Board at its meetings in December 2012 and April 2013. Investment criteria are subject to regular review by the Social Investment Board. Six investments totalling £2.6m have been approved to date, of which four (£1.8m) were approved during the period April to December 2013. Proposals for the future resourcing of the City Corporation's social investment work were approved by the City Bridge Trust, Finance and Policy & Resources Committees in January 2014.	G
<b>Objective 7 - Communications and Media - to maintain an active Communications Strategy for the Trust and its relation to the broader City Corporation promotion of its charitable activities</b>				
7	Publish articles of strategic importance to the Trust in relevant media outlets.	None set	Officers have continued to work closely with the Public Relations Office and Champollion in order to promote the Trust's work. As well as media work on City Philanthropy, there has been considerable coverage of some of the work funded on your Growing Localities and Working with Londoners programmes, as well as your new Investing in Londoners programmes, with sixteen releases reaching several outlets (one release is often picked up by several local papers). Champollion continued to work on the Parklife London website (still in beta phase) which has attracted considerable social media attention, notably through influential bloggers. The site should be complete by the end of March 2014.	G
<b>Objective 8 - Performance and Corporate Management - to continually develop staff performance and our contribution towards wider City Corporation aims and objectives</b>				
8	Ensure all staff appraisals completed to time.	Target - 100%	All CBT staff's mid-year appraisals have taken place and line managers are on track to complete end of year appraisals by April 2014. The CBT team will set new learning objectives for 2014/14 at the same time.	G

R (ed) - Off target with unresolved issues
A (mber) - Off track but with actions in hand to improve
G (reen) - On track/to plan

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**Status Definitions**

The project/activity will not be completed within the agreed budget, timescale or specification and a decision will be required on how to proceed
The project/activity is in danger of not being completed within the agreed budget, timetable or specification but action is being taken to ensure that the project will be delivered within agreed limits
The project/activity will be delivered on budget, time and to the agreed specification