

<b>Committee:</b> The City Bridge Trust Committee	<b>Date:</b> 24 May 2016
<b>Subject:</b> Quinquennial Review	<b>Public</b>
<b>Report of:</b> Chief Grants Officer	<b>For Decision</b>

### Summary

This paper introduces the next City Bridge Trust (CBT) Quinquennial Review of its funding priorities. It proposes:

- A timeline: May 2016 – March 2018
- A methodology: Diagnostic of London's needs; analysis of CBT positioning within funder ecology; analysis of best use of assets
- Resource needs to support the Review

### Recommendations

- To agree the Review's principles, methodology and timeline
- To agree a budget of £190,000 to support the Review

### Main Report

#### Background

1. Since its inception in 1995, CBT grant-making has been rooted in the evidence of need in London. This evidence has been gathered through consulting with Londoners on a regular basis and careful consideration of data and research. This may be seen as a model of good practice whilst also satisfying the agreement with the Charity Commission that such consultation will underpin CBT's funding.
2. The pattern of consultation which you have agreed to date has been to have a comprehensive review every 5 years, (the CBT Quinquennial Review), whilst retaining flexibility throughout, to adapt your funding programmes to changes in the needs of Londoners. The last Quinquennial Review was completed in 2013; and this underpins your current Investing in Londoners programmes. The next Quinquennial Review needs to be completed and implemented in 2018. This is an exciting opportunity to work with others, to ensure that CBT makes the most of its distinctive position and assets to have the most positive impact it can in tackling disadvantage in London.

#### Timeline

3. A comprehensive draft timeline with related actions is attached at Appendix 1. In summary, this is as follows:

<b>2016</b>		
	May	CBT Committee consideration of outline proposals; Team Away Day focused on Quinquennial Review
	June	Communication plan in place and communication with target audience around Review in collaboration with partners; recruitment of project manager support;
	July	Literature review/commission research
	August	Research and organising consultation
	September - November	Consultation
	December	Analysis of all findings
<b>2017</b>		
	January	Analysis of all findings
	February – April	Consultation on draft funding strategy
	May	Finalisation of draft funding strategy
	July	Agreement of CBT Committee on new funding strategy
	September	Agreement of Court of Common Council on new funding strategy
	October – March	Operational changes and resources put in place to implement new funding strategy
<b>2018</b>		
	April	Launch of new funding programmes

## Methodology

4. It is proposed that the following principles underpin the Review:
  - It will be conducted through the prism of ‘tackling disadvantage in London’
  - The analysis of need will be a zero-based approach – not entered through consideration of only what we are doing already
  - It will be collaborative, consultative and transparent: the process and findings will be openly available and proactively communicated.
  
5. The Review is about both looking back and looking forward. The principal elements proposed are:
  - Literature/data review of disadvantage in London
  - Evaluation of any lessons learned from our current programmes
  - Analysis of the most effective ways of using all of our assets (including a review of good practice in charitable funding/social investment)
  - Analysis of the distinctive position of City Bridge Trust within the London funder ecosystem (identification of its distinctive assets and

opportunities for leverage) in particular given the Corporation as trustee of the underpinning charity, Bridge House Estates

- Consultation will be central to the Review: key stakeholders will be engaged from across the community and voluntary, statutory and private sectors
- Collaboration will also be central to the Review: in particular with London Funders (embracing all London boroughs and key London funders) and Trust for London.

### **Resources to Support the Review**

6. The Review will underpin c.£100M plus of charitable funding. It is essential that the resources are committed to support an effective review and an indicative budget is set out below:

Project Management	£50,000	Average of 2.5 days a week for 12 months at £400 per day
Research	c.£75,000	
Evaluation	c.£25,000	
Consultation	c.£30,000	
Professional Advice	c.£10,000	

It is recommended that the Committee agree this indicative budget.

Appendix 1: Draft timeline

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