

## DRAFT

**Timeline for Quinquennial/Five Year Strategic Review – (in collaboration with Trust for London/London Funders)**

DATE	OBJECTIVE
<b>2016</b>	
April	Reach agreement with Trust for London and London Funders as to extent of potential collaboration
May	<p>Appoint CBT Project Manager</p> <p>Set up collaboration protocol/governance if agreed</p>
19 <sup>th</sup>	<p>Sufficient time inserted in diaries for team(s) and board(s) to engage with review</p> <p>Agreement as to scope of consultation: participants/audiences/questions (first draft)</p> <p>Draft CBT committee paper which finalises timeline/project plan and resource requirements to support review</p> <p>Draft communications plan to support the review in consultation with the Corporation's communications and public affairs team(s)</p> <p>Consult with Legal on draft Committee Paper</p> <p>CBT Committee agreement to project plan/timeline/ resources</p> <p>Communicate consultation plan to Charity Commission</p> <p>Team away day focused on the Quinquennial Review</p> <p>Present Project Plan to Corporation's People, Prosperity, and Place Groups and Chief Officers Group and request input into literature review and consultation</p> <p>Commission evaluation into Investing in Londoners programme</p>
June	<p>Commission literature review into</p> <ul style="list-style-type: none"> <li>• London context/needs through prism of tackling disadvantage</li> <li>• How to fund (ie best practice examples across grant making, social investment, mission related investment, blended finance etc.)</li> <li>• Funder ecosystem in London (analysis of who is funding what and what CBT best placed to fund)</li> </ul>

July	Literature review concluded by month end and analysis of any gaps in research or information gathering Agreement as to final list of consultees and identify group to test conclusions arising from research
August	Commission any research to fill gaps (including any vision pieces)
September	Consult with <ul style="list-style-type: none"> <li>• Grantees/investees</li> <li>• Beneficiaries</li> <li>• Key stakeholders (including business and London boroughs)</li> <li>• Corporation officers and Members/Trustees</li> <li>• Funders</li> <li>• Others</li> </ul>
October	Consultation continues
20th	Members away half day
November	Consultation continues
December	Team week: reading/reflection on analysis including team away day/s
<b>2017</b>	
January	Analysis of all findings and preparation of first draft funding strategy
February	Testing of draft funding strategy including grantee/sector survey and internal consultation with CBT Members (dedicated meeting to be arranged)
March	Testing of draft funding strategy including grantee/sector survey and internal consultation
April	Amendment to strategy following results of consultation
May	Agreement as to resource needs to deliver new funding strategy Preparation of final draft funding strategy
June	Preparation of paper for CBT Committee consideration/decision
27 <sup>th</sup> July	Agreement of City Bridge Trust Committee
August	Contingency
September	
14th	Agreement of Court of Common Council  Report conclusions to the Charity Commission Secure the resources required to deliver the funding strategy
October - December	Complete agreed changes to grants' operations informed by review conclusions: update processes/GIFTS/online application etc Set up robust evaluation/learning structure to underpin and inform next Funding Strategy

<b>2018</b>	
January	Commission evaluation of next Funding Strategy.
February - March	Contingency
April	Launch of new funding programme launched and end date for applications to Investing in Londoner's Programme announced  Evaluation of new funding programme begins

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