

Community Steering Group Timeline

September to October: Recruitment

2nd November: Welcome Meeting

25th November: Workshop 1

15 December: Workshop 2

In Workshops 1 and 2 we will work together to understand:

- The history and core values of the Endowment Fund
- How we will work together
- An investment model called 'The Bullseye' to help us monitor and guide decisions
- Our hopes, aspirations and priorities for the Fund

Between sessions:

Learning materials to watch & read

Training in communications

January 2022: Workshop 3

Workshop 3 will be about deciding where we find investment deals.

We will invite suggestions from the community, local organisations, and trusts and foundations.

Between sessions: Training in decision making and governance

February 2022: Workshop 4

In Workshop 4 we'll work to understand the process that fund managers go through when making decisions about proposed investment deals.

We'll look at decision making through the lens of Impact, Liquidity, Risk and Return.

Between sessions:

- *Training in research*
- *Research on investment sources*

March 2022: Workshop 5

Workshop 5 will bring together the learning so far and share decision-making tools that will help us create an investment portfolio to go to BD Giving's trustee board for sign off.

Between sessions: A chance to reflect on what we've learnt and how it's worked before entering the final phase

April - June 2022: Workshops 6 to 8

In these last workshops we will:

- Design the Local Fund plan
- Prepare to handover to the next group

- Finalise the CSG model those future members will experience
- Celebration Event
- July 2022

July 2022: Celebration Event

We'll end the first Community Steering Group's experience with a celebration event