

# The Berkeley Foundation: 2011 to 2021

## Executive Summary

### Introduction

In 2020, the Berkeley Foundation commissioned the Institute for Voluntary Action Research (IVAR) to evaluate its contribution to the youth sector in the South East, London and the Midlands over its first 10 years (2011 to 2021). As well as reviewing its contribution to date, we also explored how the Foundation might adapt and develop its future offer. The evaluation assessed the Foundation's performance against its strategic aims, looking specifically at three questions:

1. What impact has the Foundation had on individuals, organisations, and wider society, across its four focus areas (A Safe Place to Call Home, Access to Employment, Skills to Succeed and Health and Wellbeing)?
2. How effectively is the Foundation delivering against its strategic aims?
3. What does this mean for the Foundation's 2021-2030 strategy?

This report summarises what we heard from charity partners about their experiences of being supported by the Foundation, and their thoughts on the Foundation's contribution to their work and the youth field now and in the future. We also gathered reflections from Berkeley Foundation and Berkeley Group staff (Foundation Champions) on the Foundation's approach and the added value of being a corporate foundation.

## The Foundation's contribution

### To young people's lives

Charity partners shared their insights on the needs of the young people they support and the contribution that Berkeley Foundation has made to their work under the four themes: A Safe Place to Call Home; Health and Wellbeing; Skills to Succeed; Access to Employment.

The Foundation's continued support has **enabled charity partners to provide vital services to young people**, as well as adapt and expand their work in response to new and emerging needs. **In some cases, the Foundation is the *only* funder that has been willing to fund certain youth services.**

The Foundation's support was recognised as having contributed to a range of outcomes for young people, including:

- Finding and helping young people to access suitable, temporary accommodation and wrap-around support
- Homelessness prevention
- Making the link between access to employment, fair wages and housing

- Helping young people experiencing homelessness to have a voice
- Reducing isolation and loneliness amongst parents with young children
- Easing the stresses on children and the families of children with long-term illnesses
- Building the confidence and skills of young people who are disengaged from mainstream education or at risk of exclusion
- Building the confidence and skills of children who have limited access to safe, creative spaces to play
- Access to learning about and opportunities to practice leadership skills
- Access to careers education and advice in schools
- Access to support/mentorship from professionals
- Job creation and apprenticeship opportunities
- Support into work for specific groups

Charity partners also highlighted the importance of the support they received from Berkeley Foundation during the Covid-19 pandemic in continuing to meet the needs of the young people they support. In some cases, this was simply knowing that the Foundation would support organisations to adapt their services or deliver different activities to those they had originally committed to in their funding proposal. In others, charity partners received additional funding from the Foundation, including Covid-19 response grants to help cover the costs of things like bringing staff off furlough or moving their services online.



## On organisations

We looked at how the Foundation has supported charity resilience and operation, with a focus on their more recent experiences during 2020. It showed us that they **provide funding and support that responds to complexity**:

- Explicitly identifying and funding charity partners who work holistically
- Acknowledging and being supportive of charity partners' adaptations to their plans in response to new and emerging needs, for example, making changes to the activities or approach set out in the original funding proposal
- Being able to provide direct advice or suggestions based on their own knowledge and insight into the youth sector and other partners' work.

The Foundation's focus on building trusting relationships with charity partners is what enables them to understand and be supportive of the need for partners' adaptations to plans and activities. The importance of these relationships and the space for open and transparent conversations really came into its own during Covid-19.

The Foundation's commitment to cover up to 20% of core costs has also helped charity partners to invest in resources that go beyond the delivery of a single project and help to strengthen their organisations, like employing paid staff. Additional support made available to all charity partners through the Capacity Building Fund was also highly valued.

Across the charity sector, blended service provision, offering both online and offline services to their users, is no longer a short-term response to Covid-19 but something that will become embedded long-term amongst the majority of charities. The Foundation was thought to **understand and support the need for blended service provision** and recognised and appreciated the time and resource this requires.

The Foundation has also been **supportive of charities pursuing collaboration and partnership opportunities** and partners hoped that the Foundation might develop this role further in the future.





### On the youth sector

The Foundation's primary contribution to date has been its investment in building **its knowledge and expertise of the youth space** in order to make careful and informed decisions about what funding and support to provide. This has enabled it to provide funding and support that is responsive to need and to take risks – supporting new ideas, innovation and less popular issues. This has been built over time, in partnership with charities and other funders. It also involves sharing research and learning with others, with the aim of influencing wider agendas. For example: internally commissioned research and communications such as Rethinking Homelessness<sup>1</sup>, the Employer's Guide<sup>2</sup>; funding of external research projects like the Together Alliance<sup>3</sup>; and convening events to share learning from particular programmes, such as The Money House and Street Elite.

The Foundation's interest in and **support to pilot new ways of working** has also freed up organisations to put theories into practice and tweak as they go. In some cases, charities were able to leverage funds as a result of Berkeley Foundation's support. Again, the Foundation's understanding of young people was thought to be key to their willingness to take risks and *'to support 'out of the box' ideas that ultimately lead to more meaningful outcomes for young people'*. Charity partners emphasised an important distinction between being able to innovate within their existing work and the *'freedom to explore'*, versus a pressure to come up with new and innovative projects or initiatives. What charity partners more often need is funding for proven concepts and initiatives and the ability to adapt within these.

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1. <https://www.berkeleyfoundation.org.uk/news-and-events/rethinking-homelessness>
  2. <https://www.berkeleyfoundation.org.uk/talented-people-work>
  3. <https://www.berkeleyfoundation.org.uk/news-and-events/together-alliance-report>



## Progress towards strategic commitments

### Funding

Charity partners of all types and across all four programme areas felt they experienced the same principles of close partnership, trust and flexibility in their relationship with the Foundation. Although charities' experiences varied across the three partnership types (Strategic Partners; Community Investment Fund; Designated Charities), overall organisations are looking for similar things. Namely, longer-term support (three years or more) and availability of funding that is as unrestricted as possible and is not tied to specific project costs. The fact that the Foundation funds organisations for a minimum of three years was highly valued but many charities were keen to build even longer-term partnerships that reflect their own long-term commitments to the young people they support.

Some charity partners felt that they lacked clarity in terms of what they could expect from the partnership, including uncertainty about which funding strand they were part of. Whilst the Foundation places a clear distinction between the three types of charity partnership, in terms of the tangible elements of support available to them, there may be a need to more clearly communicate this to charity partners and set expectations.

### Adding Value

The Foundation's position as a corporate foundation, its close relationship with Berkeley Group and the practical as well as financial support for partners it provides, is something quite distinct from other funders and corporates within the youth space. Charity partners that have accessed support through the relationship with the Group and its staff have really felt the benefits to date.

Designated Charities are charities that are nominated by their local Berkeley Group divisions to be Foundation charity partners. They are the most direct beneficiaries of the relationship between the Foundation and Group and talked about benefitting from funds raised by Group staff, particularly valuing their fundraising efforts during Covid-19. The Group's active interest in Designated Charities' work was appreciated by the charities and Group staff alike. For example, opportunities for staff to volunteer gave them additional insight into charities' work and the chance to contribute their skills and time, and provided charities with valuable, additional resource. Both Designated Charities and Strategic Partners also talked about benefitting from the Foundation's connection with the Berkeley Group in terms of being able to access employment and training opportunities for young people and even direct, practical support with building and construction projects.

There was less evidence or articulation from Community Investment Fund partners of having been able to access wider support or connections to Group resources and networks, although this was something several said they would really value.

## Learning and Sharing

The Foundation has invested considerable time and resource over the years in developing its approach to gathering and sharing learning and insight on youth issues. This is particularly evident in its approach to developing monitoring and reporting systems and the role it has played as a convener.

Over the past decade, the Foundation has collected both qualitative and quantitative data to inform and improve its funding decisions and influence wider policy. As its grant-making strategy has developed, it has adapted its grant monitoring systems; **seeking regular, up to date insights into the work of partners, while aiming to minimize the burden this can place on charities.** Overall, charity partners appreciated the rationale behind the Foundation's reporting requirements, although the level of reporting felt disproportionate for some smaller organisations and/or those receiving smaller grants. Charity partners that have approached the Foundation to ask if there is scope for reporting in a different way or to a different timeline have always found the Foundation to be very open to these requests. However, this has often been reliant upon charity partners feeling confident to ask, rather than being an explicit offer to all partners.

**Charity partners had really valued the convening role the Foundation has played,** providing opportunities to network with other organisations and peers within the youth field. Some also wondered whether there was potential for the Foundation to help facilitate spaces where partners could come together to develop their influencing agendas and raise young people's voices. Some charity partners would even like to see the Foundation take on a more direct influencing role.





## **Future role and contribution**

### **Future funding and support offer**

Flexible, long-term and (where possible) unrestricted funding that helps to cover core or non-project specific costs are hallmarks of the Foundation's funding offer. This is highly valued by charity partners and supports their ability to respond and adapt to the realities of the lives of the young people they work with. Charity partners felt that these attributes were further amplified during the Covid-19 pandemic. For example, the Foundation sent a clear and consistent message to charity partners that adaptations to project activities, approach and outcome targets were encouraged. They also widely publicized and encouraged take-up of the Covid-19 emergency grants.

Charity partners are not asking for a different type of funding and support offer from the Foundation but for more of the same. The Covid-19 pandemic potentially prompted more partners to have open and honest conversations with the Foundation about the adaptations and resource required. As a result, they were made more aware of the funding and support offers available to them. The Foundation can help by encouraging and actively instigating more of these open and honest conversations in future.



## Strengthening the added value of the relationship with Berkeley Group

The Foundation's close relationship with the Group and the offer of additional corporate support is highly valued by charity partners. Although the delivery of direct support to Designated Charities has been challenging during the pandemic, Group staff – most notably the Foundation Champions – have maintained the momentum of this work. Suggested ways to strengthen this offer included:

- Enable existing charity partners to access a greater range of support as well as extend the support offer to other local charities:
  - Giving staff across different Berkeley divisions the opportunity to get involved in other Designated Charities outside of their local area
  - Making physical space and land that Berkeley has available to charity partners for events, workshops, support NVQs, e.g. space to practice construction skills etc.
  - Making available a list of charities which have approached the Foundation for support that Berkeley divisions may be able to assist
  - Giving Group staff the opportunity to put forward potential future Strategic Partners to the Foundation.
- More senior management support for volunteering, ensuring Group senior managers are promoting and encouraging take-up of staff volunteering days, either in support of Designated Charities or other local community initiatives.

**Foundation Champions and charity partners of all types are keen to further explore the potential of the Foundation/Group relationship.** Ideas for this included integrating the Group's local community plans more closely with Foundation strategy. Charity partners also felt that there was the potential for the Foundation and Group to influence other corporate bodies to think about corporate social responsibility.





## Monitoring and reporting

The Foundation has made a deliberate move towards monitoring and reporting systems that reduce the reporting burden on charity partners and seek to capture rich and nuanced insights into their work. This includes reducing reporting cycles and the option for charity partners to submit reports in their own formats. Whilst some charity partners were aware of this as an option, others were not and assumed reporting had to be in the format of the Foundation's output and outcome tracker template. Conversations about reporting requirements are reliant upon charity partners feeling confident to ask rather than it being an established, explicit principle from the start of a grant. The same open and honest conversations the Foundation is having with charity partners about how the Foundation can best support them should include conversations about monitoring and reporting, providing clarity around what grant reporting will look like and why and where there is flexibility. Feedback on grant reports received and sharing thoughts on the progress of the work is also hugely valuable<sup>4</sup> and is a process that aligns well with the Foundation's approach to learning and sharing.

## The Foundation's convening role

One of the most valuable resources to organisations working with young people, especially during Covid-19, has been the ability to connect, collaborate and work in partnership across sectors. The last year has improved attitudes towards collaboration, with many experiencing the removal of bureaucracy, red-tape and protectionism in favour of working together in the best interests of young people.

The Foundation was recognised as having played a valuable convening role in the past, making introductions to organisations working in similar contexts, which added valuable knowledge and insight to charity partners' work. Charity partners were keen to see this become more of a core part of the Foundation's support offer.

<sup>4</sup> IVAR, 2018. *New principles for grant reporting*.

There was a call amongst charity partners for more spaces to learn and connect, *'more joining the dots'*, from others working in the same field. This would help them to identify overlap in their work and the potential to pool resources or work in partnership. However, networking was regarded as valuable regardless of whether formal collaborations are formed or not.