

The Berkeley Foundation: 2011 to 2021

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1. Introduction

The Berkeley Foundation is an independent charitable foundation set up by the Berkeley Group to support charities and organisations that are helping young people to overcome barriers, improve their lives and build a fairer society. In 2020, the 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 the last 10 years (2010 to 2020). As well as reviewing the contribution to date, Foundation staff were also keen to learn about how the Foundation might adapt and develop its future offer:

‘What we’re doing well, what we’re not doing so well and really learning and not resting on our laurels and taking it forwards.’

‘Recommendations, different approaches that emerge from conversations and research you’re doing of how we could do things differently, or try something new. I’m particularly interested in learning what those things are.’

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 (listed in Appendix Two)?
3. What does this mean for the Foundation’s 2021-2030 strategy?

In addition to this report, IVAR has been providing the Foundation with rapid summaries of interim findings throughout the evaluation that have been feeding into live discussions about the future strategy.

This report

This report presents findings from research carried out between June 2020 and March 2021 with Berkeley Foundation staff, charity partners and Berkeley Group staff (Foundation Champions) on the Foundation’s contribution to the youth sector, potential future contribution, and approach to identifying and building charity partnerships.

Anonymised quotations (italicised) are used throughout the report to illustrate key points.

Our approach

The following evaluation data was collected between June 2020 and March 2021:

Six scoping interviews with Foundation and Group staff to gather their views and experiences on the Foundation's current contribution.

Desk review of the Foundation's existing evidence of impact. This review reflected on the Foundation's existing monitoring and evaluation frameworks, and what they do/do not tell us about impact. The review explored the Foundation's impact on individuals, organisations and wider society.

Online survey of all Foundation charity partners to gather insights on their experience of being a charity partner and thoughts about future support. The survey had a response rate of 86% – with 50 out of 58 charity partners participating anonymously. See Appendix Three for the full list of survey questions.

Four focus groups with charity partners from each of the Foundation's youth focus areas. Thirty-one charity partners from the different funding strands attended across the four groups, which gathered in-depth insights into the experience of being a charity partner and the context charities are operating in. We also explored how the Foundation can best support charities going forward. See Appendix One for the list of organisations that participated.

Due to the study taking place during the Covid-19 pandemic, all of the above methods were conducted online.

2. The Berkeley Foundation journey so far

The Berkeley Foundation is the grant-making foundation established by the Berkeley Group in 2011. The Foundation describes itself as working 'in partnership with the voluntary sector and others to help young people overcome barriers, improve their lives and build a fairer society'.¹

Between 2011 and 2021, the Foundation's strategy evolved from its first exploratory grant-making in 2011 to a multidimensional programme of work in 2021.

The Foundation currently has three types of charity partnerships:

- Strategic Partnerships: Long-term, high value partnerships which operate on multiple levels.
- Designated Charities: Partnerships between Berkeley offices and local charities, focused on fundraising, employees' give as you earn donations, volunteering and in-kind support.
- Community Investment Fund: Targeted funding, aimed at supporting innovation and building evidence of what works.

Each charity partner also sits under one of the following Foundation themes:

- A Safe Place to Call Home
- Health and Wellbeing
- Skills to Succeed
- Access to Employment

In its first three years, the Foundation did not have a formal published strategy, but there were a number of internal documents which shaped the approach, including the focus on young people, the four themes (although differently named and articulated), Strategic Partnerships and Designated Charities. There were also identified goals around modelling new approaches to social issues, creating an evidence base and influencing policy and practice.

In 2014, the Foundation introduced its first formal strategy, which sought to fund work that supported young people in London and the south-east of England, and which formally identified the four youth themes. These themes have remained consistent throughout the Foundation's ten years and form the basis of the 2018–21 strategy.

¹ Berkeley Foundation 2018–21 Strategic Plan.

The 2018–21 strategy made two significant adaptations to the Foundation’s model:

- Significantly increasing the number of Community Investment Fund (CIF) partnerships. It also moved from accepting unsolicited applications year-round, to having dedicated grant rounds, to proactively approaching some potential CIF partners.
- Introducing the Capacity Building Fund, open to all charity partners and aimed at growing organisational capacity, e.g. a new website, fundraising consultancy, management training, etc.

The Foundation also started testing different delivery approaches, including a focus on working with partners that engage young people in service design and delivery.

The majority of Foundation grants are for at least three years, with some Strategic Partners and Designated Charities being supported for much longer than this. Indeed, some of the grant relationships established in these early years have endured throughout the decade.

Throughout the Foundation's history, there has been a concerted effort to draw on the Berkeley Group's skills, expertise, resources and networks to add value to the Foundation's grant-making. In line with this, the Foundation continues to work with the Berkeley Group to provide the following forms of additional support to organisations:

- Fundraising by Berkeley Group staff
- Give-as-you-earn ('GAYE') donations by Berkeley Group staff
- Skilled volunteering by Berkeley Group staff
- Work experience and job opportunities at the Berkeley Group
- Networking and collaboration opportunities

One element of the 2018–21 strategy was a commitment to develop and share learning. This commitment emphasised the need to understand impact through monitoring and evaluation. The strategy also noted an ambition to share learning with funded organisations and influence stakeholders through communication and events. Section 4.3 looks at how these commitments have played out and how the Foundation’s monitoring and reporting systems and requirements are experienced by charity partners. It also looks at where and how charity partners have valued the Foundation’s role as a connector and convener to help share learning and insight, and considers the ways in which this role could be strengthened.

In 2020 the Foundation put its Capacity Building Fund on hold during the Covid-19 pandemic and instead made £650,000 in Covid-19 response grants, many of which supported organisations to adapt their approach and meet emerging needs.

3. The Foundation's contribution

This section looks at the Foundation's contribution to date in relation to:

- Young people's lives – within the four youth themes
- Organisations
- The youth sector

3.1 Young people's lives

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

The Foundation's continued support has enabled charity partners to provide vital services and support to young people and to adapt and expand their work in response to new and emerging needs. The Foundation's trust in partners' experience and knowledge of the issues on the ground and in their ability to respond appropriately became even more essential during Covid-19.

In some cases, the Foundation is the *only* funder that has been willing to fund certain services:

'Much needed specific funding for mental health/alternative education provision ... Unable to get this from any other funders so project would not exist.'

'Have enabled us to work with young people who were not eligible for other projects.'

3.1.1 A Safe Place to Call Home

Youth homelessness is a significant problem in the UK, although it is hard to quantify the scale of the problem. Young people are at greater risk of homelessness than adults, with over a third of individuals accessing accommodation services in England aged between 18 and 24.² However, the problem is likely to be worse than data suggests because young people often stay in 'hidden homeless' situations (e.g. sofa surfing), which are not captured in statistics. Indeed, there are concerns that the rate

² Homeless Link (2018) *Support for single homeless people in England: Annual review 2018*. Available at: <https://www.homeless.org.uk/facts/our-research/annual-review-of-single-homelessness-support-in-england>

of hidden homelessness among young people may be increasing, particularly in London and the south-east of England.³

In an effort to tackle homelessness, the UK government introduced the Homelessness Reduction Act (HRA) 2017, which placed new legal duties on local authorities to ensure that everyone who is homeless or at risk of homelessness has access to meaningful help, irrespective of their priority need status, as long as they are eligible for assistance. However, welfare reform and fiscal austerity since 2010 have significantly weakened the welfare safety net and support services available to young people. Local authorities face significant financial constraints in resources which limit their ability to tackle youth homelessness. Across the UK, a large number of charities are working at a local and national level to fight homelessness. They provide services that offer tailored support to young people who are homeless or at risk of homelessness.

The Foundation's A Safe Place to Call Home strategy

The aim of the Berkeley Foundation's A Safe Place to Call Home theme is to ensure that young people have secure, stable accommodation through: preventing youth homelessness; increasing access to sustainable housing; and ending rough sleeping. Between 2011 and 2020, the Foundation has granted £4.7m to organisations that support people to find and sustain affordable housing. To date, this work has reached over 5,500 people experiencing, or at risk of, homelessness.

Grant analysis

Half of the Foundation's A Safe Place to Call Home grants between 2011 and 2020 were allocated to Strategic Partnerships. Shelter was the first organisation to be supported (up to 2017) and Crisis has since become the largest grant recipient, with the Foundation supporting the provision of employment services to homeless people at Crisis centres in London, Croydon and Brent. The other Strategic Partner for housing is MyBnk, supported by the Foundation since 2016, whose programme The Money House teaches money management skills to young people at risk of homelessness.

Since 2011, the Foundation has also supported a growing number of housing-related Designated Charities – those nominated for support by Berkeley Group divisions. As well as generating £1.3m of fundraised and GAYE monies for housing-related causes, over a quarter of all Foundation grants go to housing-related organisations.

In 2018, The Foundation set up a targeted Community Investment Fund programme, Combatting Youth Homelessness. This represents a significant new commitment for the Foundation; the programme has provided grants totalling £345,439 to six organisations.

Outcomes for young people

The Foundation's support for work on housing is described by charity partners as contributing to a significant range of interconnected issues including:

- **Finding and helping young people to access suitable temporary accommodation and wrap-around support.**

³ Heriot Watt University (2015) *Youth Homelessness in the UK: A review for the OVO Foundation*. Available at: <https://pureapps2.hw.ac.uk/ws/portalfiles/portal/9258335>

- **Making the link between access to employment, fair wages and housing.** For example, making sure that things like apprenticeships pay a sufficient wage for a young person to be able to cover the cost of rent and living costs.
- **Preventing homelessness.** For example, improving young people’s soft and ‘hard’ skills such as financial literacy; accessing and navigating the universal credit system, etc. A number of housing charity partners also have initiatives supporting young people’s mental health and wellbeing.
- **Helping the youth homeless population to have a voice.** Providing platforms where young people can talk about the issues affecting them and be a part of designing the solutions. Under-representation of youth voice is an issue in general, but particularly among the youth homeless population. The Foundation has taken very deliberate steps to encourage and support the involvement of young people in the design and delivery of youth services. It has done this across all four programme areas, but perhaps most notably within its housing programme. Charity partners gave various examples of how they had used this funding and support including: training young people as peer researchers to conduct research on homelessness; creating opportunities for young service users to take an active role in project delivery – e.g. hosting events, presenting, chairing meetings, and creating platforms for youth voice.

One organisation used Foundation support to create a digital platform for knowledge sharing for their service users. It is also a space where they can share their experiences and opinions on issues affecting them. This gives a platform to the voices of young people, which can be fed back to policy makers and others. The organisation is developing its youth strategy based on the themes emerging from discussions on this platform.

3.1.2 Health and Wellbeing

Over the past decade, public health policy has shifted from treating illness to promoting healthy lifestyles, with an increasing emphasis on people taking responsibility for their own health. Alongside this shift, there is a growing trend towards understanding health in terms of 'wellbeing', a generic term that embraces physical, mental and emotional health. Furthermore, wellbeing also incorporates notions of social wellbeing, in which good health is not only located in the body but depends on social factors, such as material resources and relationships.

Wellbeing is generally understood and accepted to be a more useful and accurate term than, e.g. ‘illness’, as it draws attention to underlying issues that may result in long-term illness. The majority of children and young people report being relatively happy with their lives, but approximately 5% of young people are dissatisfied and unhappy with their lives.⁴ It is increasingly recognised that understanding the reasons for lack of wellbeing allows policymakers to intervene early. The emphasis is also increasingly on helping young people to develop the skills they need to support their own wellbeing as they grow older.

⁴ Department for Education (2019) *State of the nation 2019: Children and young people’s wellbeing*; The Children’s Society (2019) *Good Childhood Report*.

Children's mental health is a growing concern; the proportion of young people saying they have a mental health difficulty has increased six-fold in England since 1995.⁵ In response to this, the UK government and NHS have made mental health a significant policy priority, although their strategy is based largely around the treatment of high needs. Government funding for prevention and early intervention has been limited, with schools and local authority children services often lacking the resources to support early intervention work.

The Foundation's Health and Wellbeing strategy

The aim of the Foundation's Health and Wellbeing theme is to support young people to live happy healthy lives. This includes supporting a diverse range of work, but the Foundation is particularly interested in funding the following types of work:

- Activities that support the physical and mental wellbeing of young people
- Activities that support disabled young people to access social and leisure activities, and be actively involved in society
- Services that care for young people and families, including hospices that care for young people with serious or life-limiting conditions
- Organisations that support young carers

Grant analysis

Between 2011 and 2020, the Foundation granted £6.1m to organisations providing health and wellbeing services for young people. This makes health and wellbeing the Foundation's largest funding theme. The number and range of organisations supported in this focus area are considerable: funding has reached over 16,500 people.

The two Strategic Partnerships for Health and Wellbeing have been with Lord Taverners for their Disability Cricket project and the Mayor's Fund for London for their Kitchen Social project, which provides food for children during the school holidays. The Foundation has also consistently funded health and wellbeing organisations through its Community Investment Fund. Several organisations, including the Multiple Sclerosis Trials Collaboration and Richard House Hospice, have received over £1m between them over ten years of support.

Outcomes for young people

The Foundation's support for work on health and wellbeing was described as having contributed to outcomes for both young people and their families:

- **Reducing isolation and loneliness among parents with young children.** Helping them to build confidence and independence and signpost them to further services and support.
- **Building the confidence and aspirations of disabled young people through sport.** In 2020 this included online activities to continue to make young people aware of opportunities available to them in sport, and provide activities that they could try out at home that would help them to build similar skills to those they develop during face-to-face activities.

⁵ <https://www.nuffieldtrust.org.uk/news-item/striking-increase-in-mental-health-conditions-in-children-and-young-people>

- **Easing the stresses on children and the families of children with long-term illnesses.** This includes organisations being able to provide bespoke support to families, for example enabling them to choose where, when and how they access support and what this support looks like.

3.1.3 Skills to Succeed

The UK education system tends to focus on exam success. Exam results have seen steady improvements over the years and young people are now better qualified than previous generations. However, improvements in qualification assessment have not necessarily translated into improved employability. As noted in Section 3.1.4, rates of youth unemployment remain stubbornly high in comparison to unemployment rates among other age groups. Therefore, while schools may be delivering better exam results, they are not necessarily producing young people with the skills and experience that employers want.

A recent report by the Confederation of British Industry (CBI) found that employers think that young people are not 'work ready' when they leave education.⁶ The report highlighted three pillars of work readiness that employers look for in young people: character, knowledge and skills. The Learning and Work Institute, an independent policy, research and development organisation, argues that employers want to hire young people with the following skills and experience:⁷

- A positive attitude
- 'Soft skills' such as communication, problem-solving, time management, and teamworking
- 'Hard skills', especially literacy, numeracy and IT skills
- Qualifications or a commitment to boost their qualifications
- Experience of part-time jobs, work-placements, work-experience or volunteering.

While changes in the school curriculum provide one route to improving young people's employability, there must also be other opportunities for young people to develop their skills.

The Foundation's Skills to Succeed strategy

The aim of the Foundation's Skills to Succeed programme is to help young people develop the skills and capabilities they need to thrive. The Foundation looks to support work that helps young people build soft skills that are attractive to employers and are critical for long-term personal development. These skills include communication, resilience, self-belief, critical thinking, teamwork, motivation, and leadership. Science, technology, engineering and mathematics (STEM) are also considered crucial to the modern workplace, and so the Foundation supports work that helps young people to engage with STEM outside the classroom.

Grant analysis

Between 2011 and 2020, the Foundation granted £3.6m to organisations that support young people to develop their skills. Over half of the Foundation's skills funding has

⁶ CBI (2019) *Getting young people 'work ready'*. Available at: https://www.cbi.org.uk/media/2960/cbi_work-readiness.pdf

⁷ Learning and Work Institute. Available at: <http://www.whatemployerswant.org/providers/project-summary/>

been made to Strategic Partners. The number of young people reached through the Skills to Succeed partnerships is over 6,400.

Outcomes for young people

The Foundation's support for work on training and education was described as contributing to:

- **Building the confidence and skills of young people who are disengaged from mainstream education or at risk of exclusion.** For example, providing alternative education provision; homework and tutoring support; and counselling and mental health services. Organisations supported by the Foundation also work closely with schools to improve alignment and signposting between alternative provision services and in-school support. Charity partners talked about the importance of provision for children and young people outside school, including spaces where they can spend time with peers their own age.
- **Building the confidence and skills of children who have limited access to safe, creative spaces to play.** In particular for inner-city children living in housing with limited access to safe outdoor space: *'We help them enact the play they want to do.'*
- **Making more opportunities available to young people impacted by crime, violence and inequality.** For example, mentor programmes in communities.

As a result of the Foundation's increased emphasis on the involvement of young people, one charity partner that provides counselling services for young people approached them to fund a project still in the early stages of development. The project aimed to provide targeted support to children facing permanent exclusion from school, but the charity wanted the exact delivery to be shaped by young people. The Foundation's willingness to fund the organisation at an early stage enabled it to engage with young people meaningfully and take time to learn and adapt plans to develop a counselling service that reflected their range of needs.

3.1.4 Access to Employment

Young people aged 16–24 experience high levels of unemployment. In the UK, there were an estimated 763,000 young people (aged 16 to 24 years) who were not in education, employment or training (NEET) in December 2019.⁸ Although the percentage of young people who are NEET has been decreasing since 2011, there has been little progress since 2017. Despite the long-term decline, youth unemployment still remains higher than general unemployment.

A large proportion (60%) of young people who are NEET are not looking for work or not available for work, and are therefore classified as economically inactive rather than unemployed. This means that at the end of 2019, there were almost 500,000 young people not looking for work.

An Institute of Education report from 2014 identified various risk factors leading young people to become NEET. The most significant factor was low educational attainment at GCSE level. Reasons cited for low GCSE attainment typically included a

⁸ Office for National Statistics (2019) *Young people not in education, employment or training (NEET), UK*. Available at:

<https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/unemployment/bulletins/youngpeoplenotineducationemploymentortrainingneet/february2020>

lack of motivation, poor physical and mental health, and having special educational needs. The report also identified a range of personal risk circumstances, including caring responsibilities and difficult family circumstances (e.g. being in care or experiencing a breakdown in relationship with parents).

Time spent not in education, employment or training can have a detrimental effect on physical and mental health and increase the likelihood of unemployment, low income or low quality of work later on in life. Furthermore, even when finding work, young people are more likely to experience low pay or be employed on a zero-hours contract with limited progression opportunities.⁹ The long-term damage caused by young people failing to secure meaningful work is, therefore, substantial.

The Foundation's Access to Employment strategy

The aim of the Foundation's Access to Employment theme, as set out in the 2018–21 strategic plan, is to enable young people to overcome barriers to work and kick-start their careers. The strategy is based on the understanding that having a decent job provides purpose and stability in young people's lives and helps them to develop positive relations with other people.

The Foundation's strategy seeks to break down barriers to work and support young people to secure, sustain and progress in employment. The approach includes helping young people to get into work through developing employability skills, mentoring, work experience and job brokerage. It also includes working with employers and employees to help reduce barriers to work.

In 2018, the Foundation launched 'Talented People Work', an employer's guide to supporting talented young people facing barriers into work. The project involved a coalition of 11 companies, charities, universities and professional institutes and drew upon the Foundation's funding of the Street Elite project. The report was targeted at employers and encouraged them to engage with talented unemployed young people from a whole range of backgrounds who might face significant barriers to work. The report is impressive, and the guidance offered extremely practical. For example, it gives tips on things for employers to do right at the start, a few weeks in and in the medium term of a young person's employment journey. There are plans to relaunch the report as the Foundation redoubles its efforts to support young people into meaningful employment.

Grant analysis

Between 2011 and 2020, the Foundation granted £2.2m to organisations that support young people to find work. This funding has contributed to employability support for over 2,500 people. Over the ten years, £1.5m was granted to Strategic Partners. This represents almost three-quarters of grants under the employment focus. The Creativity Works project – an arts-based employability project for 17- to 24-year-olds not in education, employment or training, run by the Mayor's Fund for London – accounts for the largest amount of funding, having been supported every year since 2014.

⁹ House of Commons Briefing Paper (2018) *NEET: Young People Not in Education, Employment or Training*. Available at: <https://researchbriefings.files.parliament.uk/documents/SN06705/SN06705.pdf>

Grants under the Community Investment Fund under the 2018–21 strategy totalled £346,586, made to six organisations over two years under the Empowering Young Women into Work programme. The programme funds work that supports young women who are unemployed, and for whom there is limited existing support, to access decent and sustainable employment.

Outcomes for young people

The Foundation's support for work on employment was described as contributing to the following outcomes for young people:

- **Access to learning about and practising leadership skills:** For example, one charity partner uses the medium of sport to teach leadership skills but also as a way of engaging with young people and then providing them with access to specific mentoring and work-related leadership opportunities.
- **Access to careers education and advice in schools:** Charity partners talked about providing a wide range of support and advice for young people in schools and online but also working with schools to encourage time and space to be made within school time for pupils to access careers information and advice.
- **Access to support/mentorship from professionals:** For example, one charity partner runs a corporate mentoring and volunteering scheme where young people can access services such as telephone coaching and CV support.
- **Job creation and apprenticeship opportunities:** Rethinking the types of jobs and training opportunities being made available to young people. This includes tackling the issue of fair wages for apprenticeships that can cover housing and living costs.
- **Support into work for specific groups:** For example, one charity partner works with women in the final stages of their progress in the prison system, supporting them to apply for work opportunities.

3.1.5 In response to Covid-19

Covid-19 has exacerbated the challenges that young people were already facing, leading to more demand for the services of charity partners. Partners are also seeing a rise in the complexity of needs among the young people they already support, creating greater strain on already stretched services and resources.

Charity partners talked about the importance of the support they received from the 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 some 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.

A Safe Place to Call Home

While the pandemic is thought to have contributed to an increase in street homelessness, charity partners said this had made it easier in some cases to engage with and support young people.

The Foundation's ongoing support meant charity partners were in a good position to respond to emerging needs: *'It enabled us to respond to, and support, growing numbers of young people made street homeless as a result of the pandemic'*. They were also supported by the Foundation to adapt their services to the changing circumstances, for example, providing care for individuals who contracted Covid-19.

One organisation used the funding and support from the Berkeley Foundation to deliver one-to-one work with street homeless young people, tailoring their approach to their specific individual needs. During Covid-19 the Foundation's support enabled them to adapt their model and work intensively with groups of young people placed into temporary hotel accommodation. The organisation also provided remote services, e.g. taster sessions with universities that were made available to service users, volunteers and staff, helping to level the playing field between these groups.

Health and Wellbeing

The pandemic has been particularly isolating for young people with long-term health conditions who are even more house-bound, along with their families, due to the risk of infection. Their transition out of lockdown and/or a return to their previous normality is also likely to be slower.

Charity partners have seen increasing cases of anxiety and other mental health issues in young people. This is linked to issues surrounding isolation and social exclusion. In some cases, partners are not trained or equipped to deal with this but still provide support in the absence of anything else for service users: *'We are not clinically trained but are finding [our]selves in situations where we're having to provide this kind of support'*.

One charity partner used Foundation funding to enable them to offer virtual therapies and adult services. For example, providing virtual tours of children's hospices to help family members feel less nervous coming into the hospice once they are able to. The organisation intends to maintain these remote services even after face-to-face activities can resume as it has helped to improve access for some families and young people.

Skills to Succeed

One charity partner said they had seen exclusion rates in their area increase over the last year. Others said that some young people that were already excluded have felt additionally isolated during this period. One charity partner opened on days they were

One charity partner provides transport to pick up young people and bring them to the centre because anxiety was preventing travel. For a lot of young people, this period has significantly reduced independence: *'The young people we work with, it feels like young people have become even less confident about taking opportunities, feeling like their worlds are getting smaller'*.

not funded for to ensure that young people excluded from school had somewhere to go.

Access to Employment

Charity partners have been able to adapt the way in which employment and training support for young people is offered. For example, providing online taster sessions hosted by different industry professionals:

‘Meant that we were able to continue supporting the young men coming out of prison virtually and provide workshops such as employability, health, wellbeing.’

Moving to an online space has made some aspects of employment and training more accessible to certain groups, e.g. young women with caring responsibilities, but made the provision of certain opportunities more challenging, e.g. one-week work experience placements are less easy to adapt to online.

3.2 Organisations

The Foundation describes its intended impact thus: ‘Organisations supporting young people are stronger, more resilient, and better able to overcome challenges and operate effectively’.¹⁰ Charity partners described four factors that contribute to enabling their resilience and effective operation:

- Longer-term funding, e.g. at least three years
- An understanding of the complexity of the issues and what this means for organisations, for example the ability to take a holistic approach and be able to respond and adapt to new and emerging needs
- Opportunities to collaborate and share learning and insight with their peers
- Access to resources and support beyond funding

In this section we focus on how the Foundation has supported charity resilience and operation in general, with a focus on their more recent experiences during 2020. Section 4: ‘Progress towards strategic commitments’ provides further detail on the Foundation’s contributions to organisations in relation to Funding, Added value, and Learning and sharing.

3.2.1 Funding and support that responds to complexity

Many of the young people supported by charity partners face overlapping challenges. For example, a young person struggling with housing may also have wellbeing and/or employment needs. An understanding of this is embedded within the Foundation’s approach in a number of ways, including:

- Explicitly identifying and funding charity partners who work holistically

¹⁰ Berkeley Foundation 2018–21 Strategic Plan.

- 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 that were 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

Charity partners repeatedly referred to the 'flexibility' of the Foundation's funding and support:

'The flexibility of the funding has really allowed us to be on a "learning journey" with this project – to learn directly from young people what they need, build and test new approaches and then continue learning and adapting.'

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:

'We have found the Foundation to be very flexible and responsive during Covid-19. This has allowed us to ensure we are responding to the needs of our young people rather than sticking rigidly to a grant application that was written pre-Covid.'

Some charity partners also used the term flexibility in reference to the fact that Foundation grants can be used to cover a percentage (up to 20%) of core costs and do not have to be allocated entirely to project costs. This has helped them to invest in resources, e.g. employing paid staff, that go beyond the delivery of a single project and help to strengthen their organisations.

Additional support made available to all charity partners through the Capacity Building Grants¹¹ was also highly valued. During 2020-21, this fund was re-allocated to the Foundation's emergency response and used to support existing partners through the Covid-19 crisis (see Section 3.2.3). Charity partners that had accessed these grants had found them an important addition to supporting new or ongoing work.

3.2.2 Understanding and supporting blended service provision

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 among the majority of charities. Foundation charity partners have found that many young people prefer to have the option of online or in-person engagement. Online engagement has also enabled many

¹¹ Annual grants of up to £15,000 for work aimed at building resilience and capacity.

organisations to extend their reach and improve the accessibility of their services to their existing cohorts of young people, for example:

- Turning an outdoor playground into a video world and running 350 hours of zoom play sessions
- Providing university taster sessions online and opening these up to staff and volunteers as well as young people. This has helped to open up discussions with young people about future ambitions
- Virtual therapies and virtual tours of children's hospices so that, once things open up again, parents/families will feel less nervous coming to the hospice

Charity partners appreciated the fact that the Foundation stood by their grant commitment even when organisations were having to make quite substantive changes to their activities and approach.

Charity partners hope that the Foundation would continue to be supportive of their longer-term move to a blended approach and the need for continued experimentation as organisations understand how young people are choosing to engage with their services. For example, we heard from charity partners that many young service users who were more present online during the first lockdown (March/April 2020) are now experiencing digital fatigue, yet others had increased their engagement.

3.2.3 Supporting collaboration and partnership

Charity partners are aware that they are just one part of a young person's life, and that long-term support is needed to guide young people through the different stages of their development: *'We all play a role in a wider system of support'*. In order to respond to the range of different needs of young people, it is also important to provide a variety of services and support they can choose from rather than a one-size-fits-all solution. Partners placed a strong emphasis on working with other organisations and sectors supporting youth issues (e.g. local authorities) and felt that there had been positive shifts during Covid-19 towards better cross-sector partnership working: *'There is a different atmosphere, more comradery and willingness to work together'*.

The Foundation has been supportive of charities pursuing collaboration opportunities, and partners hoped that the Foundation might develop its role further in the future.

3.3 The youth sector

Described by the Foundation as 'systemic' impact and articulated as 'contribution to insight and learning about "what works"', the Foundation's primary contribution to date has been its investment in building its own knowledge and expertise of the youth space and applying this in order to make careful and informed decisions about what funding and support to provide. This has enabled them to provide funding and support that is responsive to need and to take risks – supporting new ideas, innovation and less popular issues.

The Foundation has also focused efforts on sharing research and learning with others, with the aim of influencing wider agendas. This has included: internally commissioned

research and communications such as Rethinking Homelessness¹² and the employer's guide;¹³ funding of external research projects like the Together Alliance;¹⁴ and convening events to share learning from particular programmes, such as The Money House and Street Elite.

3.3.1 The knowledge and expertise of the Foundation

Charity partners recognise and value the knowledge and expertise of the Foundation on youth issues. This feeds into the Foundation's ability to have open, trusting and informed conversations with partners about the types of support and services that young people require. Partners mentioned that since the appointment of the current CEO the Foundation has felt more attuned and responsive to the operating environment of partners and the young people they work with:

'The Foundation fund according to best practice and local need. They are willing to fund based on trust in community-led initiatives, including ones that are long-term and subject to chop-and-change as needed.'

Charity partners perceive the relationship with the Foundation as a partnership that offers insight, challenge and expertise as well as funding:

'Berkeley haven't just been a funder – they have offered insight, challenge and feedback that has positively impacted the way we work.'

'It feels like a collaborative discussion. They give us a good indication about what may or may not be successful in receiving their support, which is so important for smaller charities and our planning. Decision-making on grant applications is also quick which helps with our planning.'

The Foundation also acts as a conduit for sharing the work of charity partners. It does this through the Foundation's externally facing presence on various youth panels and funder networks. It has also taken on some proactive outreach on behalf of certain partners. For example, making introductions at a local level where the Foundation has existing relationships, e.g. with local authorities or the local MP.

The Foundation is also an active champion of the direct engagement of young people in discussions and decision-making processes on issues where they have knowledge and experience to contribute.

3.3.2 Support to pilot new ways of working

The Foundation's interest in and support for new ways of working has freed up organisations to put theories into practice and tweak as they go:

'The Foundation is a great sounding board for potential new programme developments. This develops a strong degree of trying new things together and always trying to increase our impact.'

1. *'This funding enabled [organisation] to delve into research, training and other support for mental health and obstacles to learning.'*

¹² <https://www.berkeleyfoundation.org.uk/news-and-events/rethinking-homelessness>

¹³ <https://www.berkeleyfoundation.org.uk/talented-people-work>

¹⁴ <https://www.berkeleyfoundation.org.uk/news-and-events/together-alliance-report>

In some cases, charities were able to leverage funds as a result of the Foundation supporting them to pilot new approaches. Again, the Foundation's understanding of young people was thought to be key to their willingness to take risks and *'supporting "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 having *'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. The Berkeley Foundation was generally felt to understand this distinction, but partners sometimes felt pressured to demonstrate that a project was concluding:

'To know that you have that support year on year and building the partnership is really good ... There is a bit of a feeling that one needs to conclude a project sometimes, but really they need to be ongoing.'

4. Progress towards strategic commitments

Berkeley Foundation's strategic commitments for 2018–21 are set out against three areas:

- Funding
- Adding value
- Learning and sharing

This section looks at what we learnt about the Foundation's progress towards strategic commitments. In particular, we explore in more detail some of the commonalities and variations in experiences between the three different types of charity partnership: Strategic Partners; Community Investment Fund partners; and Designated Charities.

4.1 Funding

The Foundation's charity partnerships are set up and administered through three routes:

- **Strategic Partnerships:** 'Long-term, high value partnerships which operate on multiple levels'
- **Community Investment Fund:** 'Targeted funding, aimed at supporting innovation and building evidence of what works'
- **Designated Charities:** 'Partnerships between Berkeley offices and local charities, focused on fundraising, volunteering and in-kind support'.¹⁵

Each of the partnerships are managed differently and, as the descriptions suggest, have slightly different attributes and intended outcomes. However, the Foundation aims to manage them according to *'the same underlying principles of close partnership, trust, flexibility, throughout'*.

Charity partners' own articulation of their partnership with the Foundation reflected the attributes described above and there were some noticeable differences in their experiences. For example, while Strategic Partners spoke confidently about the Foundation's long-term support for their work, Designated Charities and Community Investment Fund partners were less likely to agree that the Foundation is committed to them in the long term (see Table 1).

¹⁵ Descriptions taken from the Berkeley Foundation Strategy 2018–21.

Table 1: Survey findings on charities' experience of the Foundation by charity type

Type of charity partner	The Foundation provides the opportunity to collaborate and be a part of conversations about the grant-making processes			The Foundation is committed to supporting us for the long term		
	Strongly agree/ agree	Not sure	Disagree/ strongly disagree	Strongly agree/ agree	Not sure	Disagree/ strongly disagree
Strategic Partners (n=7)	7	0	0	7	0	0
Designated Charity (n=12)	8	4	0	10	2	0
Community Investment Fund (n=13)	9	3	1	6	7	1

However, there are also clear commonalities of experience in relation to the core principles the Foundation hopes to see reflected. For example, our survey of charity partners found:¹⁶

- 96% 'felt able to build a relationship with individuals in the Foundation team and have conversations about the work that they fund'
- 98% are 'able to have honest conversations with Foundation staff, e.g. share the challenges they're facing as well as the achievements'
- 92% said 'the Foundation demonstrates flexibility, e.g. when activities related to the grant need to be adapted'
- 94% feel their 'organisation is trusted by the Foundation to make the right decisions'

Although charity partners' experiences reflect the Foundation's intentions when it comes to the variations in support and approach across the three partnership types, overall the key elements of funding and support that are desirable to charity partners are the same: namely, the provision of longer-term support (three years or more) and availability of unrestricted funding.

The fact that the Foundation funds organisations for a minimum of three years was highly valued, but organisations also stressed the value of being able to build even longer-term partnerships that reflect their own long-term commitments to the young people they support. Those who had not experienced a relationship beyond three years hoped that this might be a possibility. Some also talked about the challenges of identifying match-funding.¹⁷ Some charities wondered if the Foundation could proactively help by suggesting potential match funders and/or initiating introductions.

Some charity partners felt that they lacked clarity in terms of what they could expect from the partnership. Almost 25% of survey respondents¹⁸ also did not know which funding strand they were part of. While 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.

¹⁶ Based on IVAR survey data of 50 responses (out of a possible 58) from charity partners, conducted Jan to Feb 2021. Summary report of survey findings is available.

¹⁷ Some charity partners are required to find this in order to receive Berkeley Foundation funding.

¹⁸ Ibid 16

4.2 Adding value

The Foundation's position as a corporate foundation and the close relationship between the Foundation and Group and the practical as well as financial support for partners they provide, is something quite distinct from other funders and corporates within the youth space.

Designated Charities are some of the most direct beneficiaries of the relationship between the Foundation and the Group. They talked about benefiting from the matched funding arrangement:

'They [Foundation and Group] work in partnership and the matched funding initiative is something we have recently benefited from – today in fact!'

Designated Charities also particularly valued the fundraising efforts of different Group divisions during Covid-19:

'The amount Berkeley have managed to raise for their charities, despite the pandemic, is an incredible achievement.'

The Group was also recognised as taking an active interest in their work: *'They proactively check-in with us and solicit to give practical feedback on the issues of young people and ask how they could help'*.

These views aligned with Berkeley Group Foundation Champions' experiences of where they felt they had been able to add most value to their Designated Charities. They felt that the financial contribution they were able to make through fundraising and match-funding by the Foundation was significant and making a meaningful difference to the Designated Charities they support.

Foundation Champions recognised that the extent to which they were able to add value was partly dependent on the Designated Charities selected. For example, in the case of a children's charity the link with employment opportunities simply is not there.

Some tensions were also identified between the needs of some Designated Charities and the needs of the business, and there was a sense that these could perhaps be better aligned. For example:

- Sometimes young people identified by a charity for work experience opportunities are not aligned with geographical restrictions on the Group's recruitment: *'I'm having to let them down and say sorry, this person isn't local to our area'*.
- The level and type of engagement desired. For example, whether or not charities want or need volunteering and other forms of support alongside fundraising. This can result in a mismatch between what charities need and what staff would like to provide.
- Difficulties engaging other staff to support Designated Charities. This may be due to a lack of suitable volunteering opportunities: *'Our Designated Charity would be grateful for volunteers but normally it's 9pm – 2am and you have to live within a short distance of where they are based'*. Alternatively, it may be because the fundraising opportunities on offer are only relevant to a certain

group of staff, e.g. charity places to compete in the London to Brighton bike race. Covid-19 has also reduced the opportunities to interact directly through volunteering or fundraising. Foundation Champions felt that more senior management buy-in would help increase staff engagement.

Strategic Partners also talked about benefiting from the Foundation's connection with the Berkeley Group, including access to employment and training opportunities for young people:

'Berkeley Foundation have also offered support through their staff expertise, specifically within construction and building trade, leading to potential site building assistance and employment/intern opportunities for older young people.'

A Strategic Partner also said that due to their Group's connections in the local area, it *'has led to donations, gifts and experiences for our young people'*.

There appeared to be less evidence or articulation from Community Investment Fund partners of having been able to access wider support or connections to Group resources and networks. However, several Community Investment Fund partners talked about valuing opportunities to build a relationship with the Group, for example by engaging with them in discussions around housing and homelessness. Others were generally curious and interested in finding out more about the relationship between the Foundation and the Group.

Ways in which the Foundation could build on its commitment to provide 'added value' are explored in greater detail in Section 5.2. However, what is clear is that not only those who have accessed this support, but also those Foundation and Group staff involved in providing it, have really felt the benefits to date.

4.3 Learning and sharing

The Berkeley Foundation is committed to being a learning organisation and has articulated this in the following ways:

- Working with our partners to **measure the impact** of our funding in a way that is both rigorous and proportionate
- **Commissioning new research** where there is a lack of understanding of the issues
- Taking every opportunity to **learn from and listen** to the people and organisations we support¹⁹

The Foundation hopes to use what they learn 'to inform and improve their strategy and funding decisions, share insights and influence wider policy and practice'.²⁰ Included in this is a desire to share what has not worked, as well as what has.

¹⁹ Descriptions taken from the Berkeley Foundation Strategy 2018–21.

²⁰ Descriptions taken from the Berkeley Foundation Strategy 2018–21.

4.3.1 Monitoring and reporting systems

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. One such recent adaptation has been a shift from quarterly to six-monthly reporting.

In general, charity partners considered the Foundation's reporting requirements to be appropriate and proportionate. However, current reporting still involves additional work for many charity partners and 16%²¹ disagreed or strongly disagreed that 'The reporting data requested by the Berkeley Foundation is what we would anyway be capturing and reporting on in our day-to-day work'. The level of reporting felt particularly disproportionate for smaller organisations and/or those receiving smaller grants:

'The level of detail required is quite high. We understand that funders have a responsibility to ensure the funds are spent as allocated, but the reports are quite demanding in terms of data required, considering they are six monthly. I would also suggest that the reporting format could be produced in collaboration with the charity, so that the reporting is in line with what is already being produced as a part of the project.'

There was a general preference for producing reports more collaboratively with the Foundation and an appetite for a mixture of written and spoken reporting, e.g. via Zoom calls. There was also a request to try, where possible, to align the data required by the Berkeley Foundation with the data already being gathered by charities. 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.

There was some inconsistency of experience²² regarding reporting, depending on who manages the grant within the Foundation and/or which Berkeley Group division charity partners have a relationship with. Some felt able to develop an open and transparent relationship with their grants manager and be honest about the challenges as well as the successes, while others did not have this kind of relationship.

It is also worth noting that the Foundation currently aggregates its grants data annually by theme – recording, for example, the number of people supported by charity partners under each theme in a given year. There is a risk, however, that this system makes it more difficult for the Foundation to step back and identify patterns and trends that cut across themes or emerge over a longer period of time.

4.3.2 The Foundation's convening role

A strong message coming from all charity partners is a desire for more opportunities to engage in ongoing conversations with the Foundation and other charity partners in order to learn from each other's insight and experience. A number of charity partners had really valued the convening role the Foundation had played in the past, providing

²¹ Based on IVAR survey data of 50 responses (out of a possible 58) from charity partners, conducted Jan to Feb 2021. Summary report of survey findings is available.

²² Several comments were made by different charity partners in both the survey and focus groups.

opportunities to network with other organisations and peers within the youth field, and hoped that they would resume this role again. 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:

'Berkeley Foundation could have a role in bringing Alternative Provision (AP) voices together to allow AP of all types to be more mainstream and supportive of the education sector. AP was largely overlooked by government throughout Covid.'

Some charity partners would even like to see the Foundation take on a more direct influencing role: *'It would be great if Berkeley Foundation could encourage other companies in diversity ... e.g. by hosting employability workshops and inviting partners or other corporates'*.

5. Future role and contribution

The aim of this evaluation was to help the Berkeley Foundation reflect on its ten-year journey and contribution to date and to gather the perspectives of Foundation charity partners, staff and volunteers on its future offer.

Our findings show that the Foundation has had, and continues to have, an impact on individuals and organisations within the youth field across its four areas of housing, health and wellbeing, education and training, and employability.

The Foundation is regarded as a genuine partner by those it funds, with a shared and active interest in youth issues and a desire to support interventions that can respond appropriately. This includes the ability to flex and adapt in response to the needs of young people and the uncertain environment in which these organisations operate.

The Foundation adds value through its close relationship with the associated business, the Berkeley Group. This relationship brings additional funding for youth issues and organisations, and connects charity partners to opportunities for the young people they support.

The evaluation findings do not indicate a need for a major overhaul – the majority of charity partners hope for *'more of the same'* from the Foundation going forwards. However, there are four areas where the Foundation's offer could be further strengthened in order to have an even greater impact:

1. Future funding and support offer
2. Strengthening the added value of the Group relationship
3. Monitoring and reporting
4. The Foundation's convening role

5.1 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 publicised and encouraged take-up of the Covid-19 emergency grants.

Charity partners are operating in an environment of continued uncertainty in terms of the needs of the individuals they support, how best to respond to these needs and what resource is required. For example, while some organisations have resumed in-

person delivery, it is going to be some time before they have a full picture of what the demand for face-to-face activities will be. The time and resource required to deliver services is the same, even for those working with fewer young people than they were working with prior to the Covid-19 pandemic. Providing blended in-person and online services also requires different and additional resource.

What was described by charity partners as additional 'flexibility' demonstrated by the Foundation during 2020, appears to be the amplification of its existing offer, rather than something different or new. Charity partners are not asking for a different type of funding and support offer but for more of the same. The Covid-19 pandemic 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.

5.2 Strengthening the added value of the Group relationship

The Foundation's close relationship with the Group and the accompanying corporate support offer is valued by charity partners and Foundation staff alike. 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. The evaluation findings identify a number of ways to strengthen this offer in future:

- **Enable existing charity partners to access a greater range of support and also 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 Group has available to charity partners for events and workshops, and support NVQs with, for example, space to practise 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 also felt it would help to formalise the process of assessing potential new Designated Charities and establishing the support offer. This could include taking a more strategic, planned approach to accessing and making the most of Group expertise, for example by offering a list of skills that charities can select from (sustainability, marketing, IT, financial) and having some prepared responses ready to common questions. IVAR's previous work evaluating, delivering and researching funding plus and capacity building support²³ stresses the important role of the diagnostic process in ensuring a fit between those being supported and those

²³ IVAR (2011) *Beyond Money. Funding Plus in the UK.*

providing support, helping to get beneath the presenting problem and identify what charities really require.

The Foundation Champion role is valued by charity partners and Berkeley Group staff alike. Foundation Champions often build close relationships with Designated Charities, giving Champions an in-depth understanding of the charity's work and enabling Designated Charities to have open and honest conversations about the type of support they need. It was felt that the Foundation Champion role would be more effective if there were clearer expectations around the role and more support from Group senior management. Sometimes it felt that work for the Foundation should only be done in free time or as an addition to their day job, and some Foundation Champions had found it difficult to generate wider support among their Group colleagues. More support from senior management, for example making staff aware of volunteer days and encouraging take-up, would encourage greater engagement across Group staff.

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, *'so that output is more powerful'*. Charity partners also felt, however, that there was the potential for the Foundation and Group to influence other corporate bodies to think about corporate social responsibility.

5.3 Monitoring and reporting

The Foundation has made a deliberate move towards monitoring and reporting systems that reduce 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. While 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 can and should include conversations about monitoring and reporting, providing clarity around what grant reporting will look like, and why and where there is or isn't flexibility. Feedback on grant reports received and sharing thoughts on the progress of the work is also hugely valuable²⁴ and is a process that aligns well with the Foundation's approach to learning and sharing.

5.4 The Foundation's convening role

One of the most valuable resources for 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.

²⁴ IVAR (2018) *New principles for grant reporting*.

The Foundation was recognised as having played a valuable convening role in the past by 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.

There was a call among 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 or not formal collaborations are formed.

5.5 Final remarks

The Foundation is recognised as an essential funder in the youth space, in some cases funding initiatives that otherwise would not be funded. Their active engagement and interest in the youth space and youth issues has enabled them to develop a funding and support offer that is responsive to, and appropriate for, the needs of the youth organisations and young people they support. This was particularly evident during the Covid-19 pandemic, when the Foundation continued to have open conversations with charity partners about how they could best support them. They also provided targeted grants in support of charity partners' need to adapt their activities and approaches.

The experiences of all charity partners show that the lives of the young people they support and the issues they face are multi-faceted and complex. The support required in response is therefore often long-term and needs to be able to flex and adapt over time – requiring funding that is also flexible, long-term and, where possible, unrestricted.

In terms of the Foundation's added value, its close relationship with the Berkeley Group, and the practical as well as financial support it provides for partners, distinguishes it from other funders and corporates within the youth space. While there is a challenge in balancing the needs of the youth organisations it supports with the Group's corporate drivers, there is clear potential to make more of this relationship. For example, there is appetite for the Foundation to lean into the role of 'broker', helping Group divisions and staff to broaden their engagement with, and offer to, the charities they support.

Finally, the value and importance of opportunities and spaces to connect and be convened is a clear gap that the Foundation is being asked to help fill. While youth organisations are independently networking and collaborating among themselves, the Berkeley Foundation can help to provide an additional convening role, enabling charity partners to learn from each other's experience and build new connections.

Appendices

Appendix One: Participating charity partners

The following charity partners participated, by invitation, in one of the four focus groups run by IVAR in March 2020 as part of this evaluation. Additional charities that participated in the survey conducted by IVAR are not named as the survey was conducted anonymously.

Adventure Learning	No5 Young People
Beating time	Oarsome Chance
Demelza	Rentstart
Ellenor	Settle
Evelina London Children's Hospital	SPEAR London
High Trees	St Basils
Home Start London	Thames Reach
Imperial College London	The Baytree Centre
Key4Life	The Change Foundation
Khulisa	The Foyer Federation
Leadership through sport and business	Toynbee Hall
Lord Taverners	Triangle Adventure Playground
Mayor's Fund for London	Vauxhall City Farm
Momentum Children's Charity	Ways into work
MyBnk	Young Women's Trust

Appendix Two: Berkeley Foundation strategic commitments 2018–2021

The following are the strategic commitments set out by the Foundation in its 2018–2021 Strategic Plan.

Priority 1: Funding

We believe in the power of long-term funding. Wherever possible we work with organisations for three years or more. This helps build trust, and provides our partners with stability and consistency. We provide funding to organisations supporting young people to improve their lives through three main routes:

- **STRATEGIC PARTNERSHIPS** Long-term, high value partnerships which operate on multiple levels.
- **COMMUNITY INVESTMENT FUND** Targeted funding, aimed at supporting innovation and building evidence of what works.
- **DESIGNATED CHARITIES** Partnerships between Berkeley offices and local charities, focused on fundraising, volunteering and in-kind support.

Over 2018 to 2020, the Foundation committed to:

1. Finding projects that will enable us to grow our total funding year on year, so that we are giving at least £3.5 MILLION BY 2021 through grants, staff fundraising and GAYE.
2. Working in partnership with other funders, businesses and local authorities to develop a more **COLLABORATIVE APPROACH** to funding, which leverages our giving and increases its impact.
3. Launching a **CORE COST COMMITMENT** which will ensure that every grant we make takes a full cost recovery approach.

Priority 2: Adding value

As well as funding frontline services, we also use our skills, expertise, resources and networks to create development opportunities for our partners and their beneficiaries. Our partnership with the Berkeley Group provides us with access to a wide range of assets and opportunities. We can provide:

- **ACCESS TO SKILLED VOLUNTEERING** by Berkeley staff.
- **WORK EXPERIENCE AND JOB OPPORTUNITIES** with the Berkeley Group and its supply chain.
- **ADDITIONAL FUNDING** to help our partners build capacity and address organisational development needs.
- **OPPORTUNITIES FOR NETWORKING AND COLLABORATION** both between our partners and within our wider networks.

Over 2018 to 2020, the Foundation committed to:

1. Developing a broader range of SKILLED VOLUNTEERING OPPORTUNITIES for Berkeley staff, increasing the number of volunteer hours given across the Berkeley Group and measuring the impact of this for both charities and staff.
2. Creating more opportunities for our partners to meet, NETWORK AND COLLABORATE with each other and our wider networks.
3. Developing STRONGER PATHWAYS FOR YOUNG PEOPLE taking part in Berkeley Foundation programmes to access work experience and EMPLOYMENT OPPORTUNITIES with the Berkeley Group and its supply chain.

Priority 3: Learning and sharing

We strive to be a learning organisation. This means:

- Working with our partners to MEASURE THE IMPACT of our funding in a way that is both rigorous and proportionate.
- COMMISSIONING NEW RESEARCH where there is a lack of understanding of the issues.
- Taking every opportunity to LEARN FROM AND LISTEN to the people and organisations we support.

We use what we've learned to inform and improve our own strategy and funding decisions, share insights and influence wider policy and practice. We do this by publishing evaluations and reports, convening events and communicating about what didn't work as well as what did. We aim to be transparent about our grant-making in order to drive improvements for ourselves, other funders and the wider sector.

Over 2018 to 2020, the Foundation committed to:

1. Undertaking a LONG-TERM EVALUATION of the Foundation's impact, to be published in 2021. As part of this, we will develop opportunities for partner charities and their beneficiaries to give feedback on our work.
2. Creating a LEARNING PROGRAMME which provides space for our partners to share, reflect and develop their work.
3. Raising the Foundation's profile and ability to influence key stakeholders by developing and implementing a NEW COMMUNICATIONS STRATEGY.

Appendix Three: Charity partner survey questions

1. Which of the four Berkeley Foundation funding strands are you connected to?
 - Strategic Partnership
 - Community Investment Fund
 - Designated Charity
 - Capacity Building Fund
 - Don't know

2. Between May 2019 to end of 2020, what is the total amount that you have received? This includes direct grants from Berkeley Foundation (including one-off, additional grants) and/or funds raised for your organisation by Berkeley Group employees.
 - Between £1k to £10k
 - Between £10k to £50k
 - Between £50 to £100k
 - Over £100k

3. How long have you been a Berkeley Foundation charity partner?
 - Less than one year
 - 1-2yrs
 - 2-4yrs
 - 4-6yrs
 - 6-8yrs
 - 8-10yrs

4. Which of the Foundation's following youth themes do you receive funding through?
 - A SAFE PLACE TO CALL HOME: Ensuring young people have secure, stable accommodation
 - HEALTH AND WELLBEING: Supporting young people to live happy healthy lives
 - THE SKILLS TO SUCCEED: Helping young people develop the skills and capabilities they need to thrive
 - ACCESS TO EMPLOYMENT: Enabling young people to overcome barriers to work and kick-start their careers
 - Don't know

5. The following statements set out some potential features of being a Berkeley Foundation charity partner. To what extent do you agree or disagree with these statements?
 2. (Answer options = Strongly disagree; disagree; not sure; agree; strongly agree)
 - I am able to build a relationship with individuals in the Foundation team and have conversations about the work that they fund
 - The Foundation provides the opportunity to collaborate and be a part of conversations about the Foundation's grant-making processes
 - I am able to have honest conversations with Foundation staff, e.g. share the challenges that we're facing as well as the achievements
 - The Foundation demonstrates flexibility, e.g. when activities related to the grant need to be adapted
 - Our organisation is trusted by the Foundation to make the right decisions.

- The Foundation is committed to supporting us for the long term
6. **Is the length of the partnership with Berkeley Foundation sufficient or in line with what you want to achieve?**
 - Yes
 - No
 - Any comments
 7. **In relation to your grant reporting arrangements with Berkeley Foundation, to what extent do you agree or disagree with the following?**
 3. (Answer options = Strongly disagree; disagree; not sure; agree; strongly agree)
 - The level of grant reporting required feels appropriate and proportionate to the grant provided
 - The reporting data requested by the Berkeley Foundation is what we would anyway be capturing and reporting on in our day-to-day work
 - I find written reports the most useful format for reporting on progress
 - I find in person or phone/Zoom conversations the most useful format for reporting on progress
 - Any other comments
 8. **Please use this box to tell us anything else about the way in which Berkeley Foundation supports you and your organisation.** We're particularly interested in how the support the Foundation provides adds value to your organisation and the issues you are working on, and how it relates to other support and funding that you receive.
 9. **In terms of the challenges and opportunities that are front of mind for your organisation now and in the coming year, can you tell us a bit about:**
 4.
 - a) What kind of support does your organisation need going forward?
 - b) What could the Berkeley Foundation do more of, less of, or do differently in order to continue to add value to your work?