

# A force for change



Berkeley Foundation  
2030 Strategic Plan



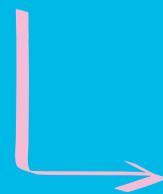
Street Elite

“Our vision is that young people and their communities will have the tools and resources they need to thrive and be a force for change in the world”



Gifted Young Generation

### What's inside?



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Honeypot Children's Charity

# Better together



Art Against Knives

For ten years, the Berkeley Foundation has been working in partnership with brilliant front-line charities across London, Birmingham and the South of England to help young people and their communities to thrive.

We were established by Berkeley Group following the financial crisis, at a time when youth unemployment was at record levels and reductions in public spending were beginning to take their toll on local services.

Over our first decade, we have worked with more than 130 voluntary sector organisations, committing over £23m in support of their work with local communities. Those organisations have transformed lives: helping to break the cycle of homelessness; supporting young people to re-engage with education or take their first steps into work; providing crucial mental health support when nothing else was available. With our support, they have reached more than 33,000 people.

Berkeley staff have volunteered tens of thousands of hours and raised over £6.7m for the Foundation and our charity partners. The contributions of Berkeley Group and its staff - who are themselves embedded in local communities across the areas where we work - has been critical to this impact. They have opened up jobs and work experience placements for young people, held construction site tours and careers workshops, donated

<sup>1</sup> IVAR (2021), The Berkeley Foundation, 2011-2021

materials, labour and advice to support with construction projects, and lent their voices to campaigns.

Working together in this way, we have developed an approach to funding based on partnership. We work hard to build long-term, trust-based relationships with charities and a recent external evaluation of our work found that 98% of our charity partners felt they had an open and honest relationship with the Foundation team, and 94% felt that they were trusted to make the right decisions.<sup>1</sup>

So why is now the right time to launch a new strategy for the Berkeley Foundation? Ten years on, we are all reeling from another crisis - a global pandemic - and facing perhaps the greatest challenge of our lifetimes in the form of climate change. We want to make sure the Foundation is fit for purpose for the 2020s; ready to meet the needs of young people and their communities at a time of deep inequality and uncertainty about the future.

# £23m

We have committed over £23m in support of our charity partners



SPEAR



MyBnk

“The partnership has helped SPEAR to build additional capacity and improve our services for young people and all our clients for the future”

Heidi Shrimpton, Head of Fundraising, Communications & Volunteering, SPEAR

98%

of our charity partners felt they had an open and honest relationship with the Berkeley Foundation team

Our 2030 strategy sets a clear vision for the future: that young people and their communities will have the tools and resources they need to thrive and be a force for change in the world. We recognise that the best solutions often come from within communities, and want to work with charities that are closely connected to the people they serve.

Our vision is supported by five deeply interconnected impact goals. The first three of these – ‘A safe place to call home’, ‘Journey to employment’, and ‘Health and wellbeing’ – will see us continuing our work to tackle homelessness and unemployment, and support good physical and mental health. These issues have been at the core of our work for ten years, and are as pressing today as they ever have been.

We have introduced a new fourth goal, ‘Youth leadership’, which will see us funding more work which puts young people in the driving seat, supporting the leaders of tomorrow to positively impact their communities and have a say on the issues that matter to them.

These four goals are supported by the fifth, ‘A resilient voluntary sector’. We recognise that charities are the cornerstones of our communities, providing vital services and

finding creative solutions. Everything we do, we do in partnership with other charities. But these organisations – particularly those that are small, grassroots and minority-led – are under huge pressure. This strategy will see us supporting charities to build their organisational resilience, to help make sure they are around for years to come.

There is more information on each of these goals over the following pages. We have also made a set of commitments about the way we, as a foundation, will operate; including new commitments to diversity, equity and inclusion, and involving young people in our work. Each commitment is a work in progress – we recognise that we have more to do in each area, and aim to learn, review and improve over the lifetime of the strategy.

Through this new strategy, we want to have a lasting impact for the young people and communities we serve. That means investing for the long term, while also leaving space for risk, innovation, and new ideas. It means funding flexibly, without losing sight of the need to learn as we go. It means listening to what is needed as the world changes around us, and coming together to find solutions that work.

# Now is the time



ellenor

# Overview of our strategy

We have worked closely with our board of trustees, charity partners, and key stakeholders across the Berkeley Group to shape our strategy for the next ten years.

In addition, in 2020 we commissioned the Institute for Voluntary Action Research (IVAR) to carry out an evaluation of our impact over the first ten years.

Taking the recommendations from the report into the discussions with stakeholders helped us refine our goals and commitments going forward.

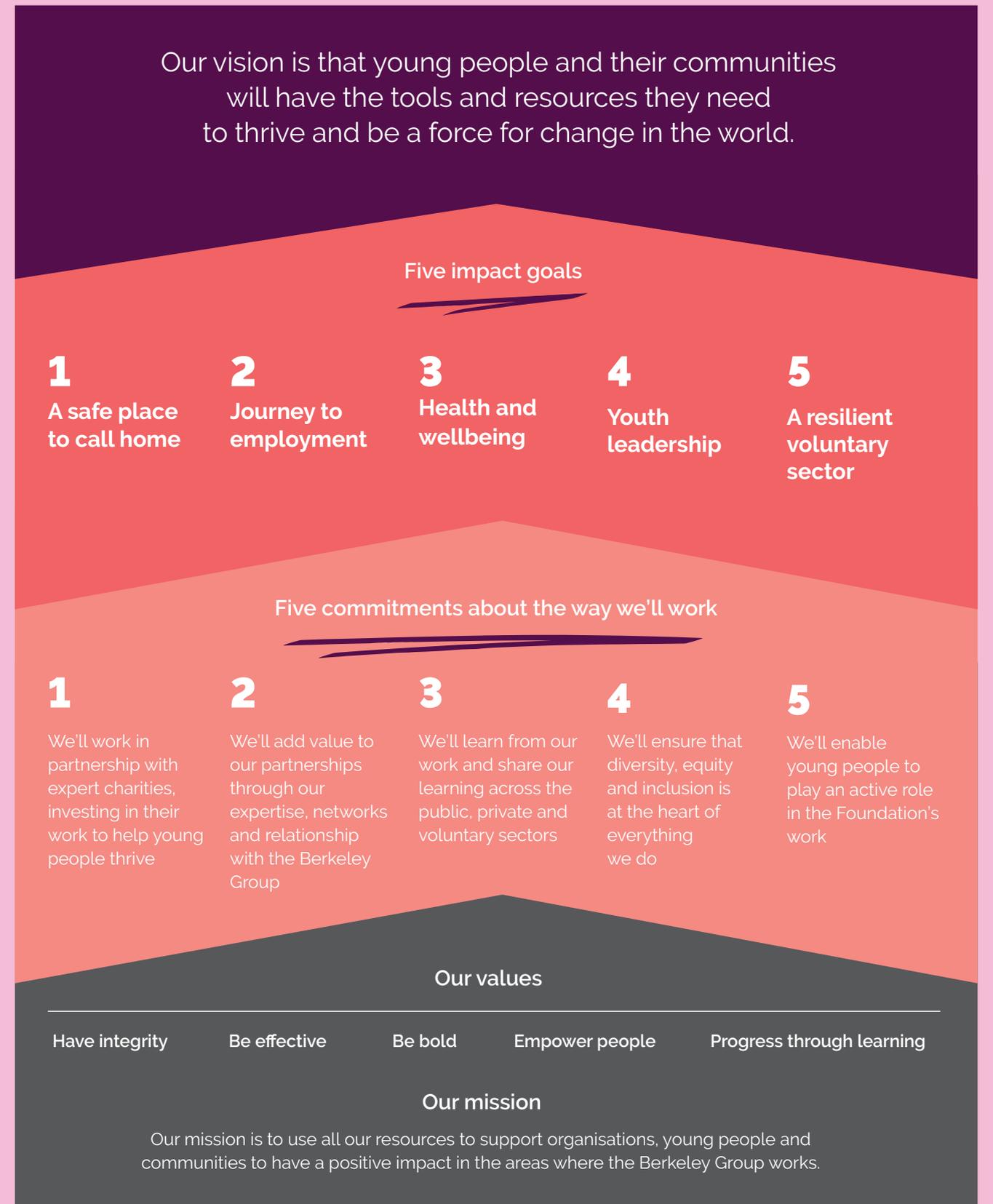
The result is a revised vision and mission, and a long-term strategy which sees us evolve our previous goals, making them more relevant to a changing external environment, and bringing more young people into each stage of the grant-making process.



Read more about the IVAR report



Imperial College London





**2030 goal**  
We want to ensure that everybody in our communities has somewhere safe, secure and sustainable to call home

# 1 A safe place to call home

## Why this goal?

A home can be the foundation on which we build our lives, the place we branch out from and the safe haven we return to. For the many people across our communities experiencing or at risk of homelessness, however, the reality is very different.

For the last decade we have been supporting leading homelessness organisations to drive change, championing preventative approaches, funding support for individuals experiencing homelessness, and exploring how systems and services can work better for the people they are designed to help.

Homelessness remains 141% higher than it was in 2010 and is a pressing issue for communities across London, the South of England, and Birmingham. Young people are at higher risk than adults, yet there is a lack of youth-specific provision. We want to support organisations that are ambitious about ending homelessness, and services that put people experiencing homelessness at the heart of their work.

## What do we want to achieve?

- More people experiencing or at risk of homelessness develop independent living skills
- More people who are at risk of homelessness avoid becoming homeless
- More people experiencing homelessness are able to move into accommodation that is safe, secure and sustainable, ending their homelessness for good
- More systems and services operate in a way that puts the needs and experiences of homeless people first.



## Why this goal?

Decent, sustainable employment can bring purpose and community to our lives, and is an important route out of poverty. Experiencing unemployment early in life, on the other hand, is linked to life-long reductions in wages, increased chances of experiencing longer term unemployment, and poor mental health.

We know that the employment market is not a level playing field, and that many young people (for example those who are working class, disabled and from minoritised backgrounds) face additional barriers to work.

Youth unemployment remains persistently high in the UK; well above the level for the wider adult population.

We want to ensure that all young people are able to develop the skills, attitudes and experiences they will need to succeed, and that many more young people are able to find jobs and careers they love.

## What do we want to achieve?

- ✓ More people facing barriers to work build the skills, attitudes and experiences they will need to succeed in the changing job market.
- ✓ More people facing barriers to work move into meaningful, sustainable employment.
- ✓ More employers are equipped to successfully recruit, develop and retain young people from diverse backgrounds.

# 2

# Journey to employment

## 2030 goal

We want to ensure that all young people are prepared for work and have the opportunity to build a sustainable career



**2030 goal**

We want to ensure that young people and their communities have the support they need to live happier, healthier lives

# 3 Health and wellbeing

## Why this goal?

Health inequalities impact the opportunities people have to lead healthy lives, and the care and support we receive when we need. Who we are, where we live, our socio-economic background and our experiences can all play a part.

Young people can face additional challenges. Studies show levels of wellbeing among young people declining overall, with young people more likely to be lonely than the wider population, and more likely to report a mental health difficulty than ever before. Yet access to appropriate mental health services for young people is limited.

We want to continue our work with organisations supporting young people and their communities to lead happier, healthier lives – whether through access to exercise, healthy food, and green spaces, or through access to high quality care and support for those who are struggling.

## What do we want to achieve?

- More people have access to the building blocks of a healthy life: good diet, physical activity, secure relationships, and access to nature.
- More young people develop positive mental wellbeing, confidence, resilience and self-esteem.
- More people experiencing ill health have access to the high quality care and support they need.

## Why this goal?

We believe young people should be involved in shaping the services, systems and policies that affect their lives, and have a say over the issues that matter to them.

Over the last ten years we have funded some fantastic work led by young people themselves – young people who have become coaches, role-models and mentors, who have designed and led research, and who have spoken about their experiences to politicians and decision makers.

Our Youth Leadership impact goal will build on this. We'll support current and new partners to deliver work that helps young people – particularly those from disadvantaged and marginalised backgrounds – build their leadership skills and become a force for change in the world. Through this work, we want to help develop and empower the next generation of civic leaders.

## What do we want to achieve?

- ✓ More young people gain the skills and knowledge to take on leadership roles.
- ✓ More young people are able to participate actively in decision-making processes about issues that matter to them.
- ✓ More young people are able to develop solutions to challenges affecting them and their communities.

# 4 Youth Leadership

**2030 goal**  
We want to ensure that young people are empowered to positively impact their own lives and the communities in which they live



**2030 goal**

We want to ensure that young people and their communities are supported by a voluntary sector that is effective, inclusive and well-resourced

# 5 A resilient voluntary sector

## Why this goal?

Over ten years of working in partnership with charities and CICs, we have seen countless examples of the voluntary sector's resourcefulness, creativity, and unparalleled ability to respond to the needs of communities.

We have also learned, however, that many small-to-medium sized charities are under constant pressure; operating in a fast-changing external environment, with high levels of demand for their services, and hampered by short-term funding cycles.

Through this goal, we want to support these vital charities to build their organisational resilience – their ability to plan for, cope with, and respond to change – whether through improved governance and people power, better financial planning or stronger systems and strategies. In this way, we hope to ensure that they will be around to support young people and their communities for many years to come.

## What do we want to achieve?



Voluntary sector organisations have an improved ability to anticipate, prepare for, respond and adapt to incremental change and sudden disruptions in order to survive and prosper.

# Our commitments

Sitting alongside our five impact goals are five commitments about the way we will work over the coming years.

Developing our practice across each of these areas will help ensure that we can continue to support our communities in a way that is effective, inclusive and collaborative.



Women into Construction

The Lord's Taverners



The Change Foundation



## Partnerships

**2030 commitment:**  
We'll build partnerships with expert charities, investing in their work to help communities thrive.

### What do we want to achieve?

- We'll increase the average length of our partnerships, working with charities for longer periods and deepening our relationships and impact.
- We'll increase the proportion of our total funding which is being given to unrestricted grants and core costs.
- We'll continue to collect feedback our partners on their experiences of working with us, and will use this to continue to learn and evolve our approach.

## Adding value

**2030 commitment:**  
We'll add value to our partnerships through our expertise, networks and relationship with Berkeley Group.

### What do we want to achieve?

- We'll increase levels of Berkeley staff engagement in the Foundation's work, including through fundraising, volunteering, and payroll giving.
- We'll increase the numbers of work experience placements and job opportunities at Berkeley being taken up by young people supported by our charity partners.
- We'll create more networking opportunities for our charity partners, and use our convening power to catalyse new relationships.

## Learning and sharing

**2030 commitment:**  
We'll learn from our work and share our learning across the public, private and voluntary sectors.

### What do we want to achieve?

- We'll review our approach to grant monitoring and reporting, ensuring this is flexible, proportionate and useful to all parties.
- We'll grow our influencing work, using our platform and network to champion the causes, charities and communities we support.
- We'll continue to be transparent about our grant-making, in order to drive improvements for ourselves, other funders, and the wider sector.

## Diversity, equity and inclusion

**2030 commitment:**  
We'll ensure that diversity, equity and inclusion is at the heart of everything we do.

### What do we want to achieve?

- We'll publish a diversity, equity and inclusion strategy looking at all aspects of our operations, and track and communicate our progress against this.
- We'll increase the proportion of our funding going to organisations led by and for marginalised communities.

## Youth participation

**2030 commitment:**  
We'll enable young people to play an active role in the Foundation's work.

### What do we want to achieve?

- We'll explore new ways to engage young people in the Foundation's work – this might include offering apprenticeships or paid work experience, involving young people in our grant-making, and/or developing a youth advisory group.
- We'll pilot a participatory grant-making approach, involving young people directly in the process of designing and developing a funding programme.

# How we work

We use all our resources to support organisations, young people and communities to have a positive impact in the areas where Berkeley Group works.

Berkeley Group provides core funding for the Foundation, and also pays our overheads. This support means that every penny raised for the Foundation can be spent directly on charitable activities. In addition, Berkeley Group staff get involved by organising fundraising events, volunteering their time, and donating through payroll giving. Berkeley Group matches everything they raise, pound for pound.

We build charity partnerships in four main ways:

### Strategic Partnerships

We have a small number of long-term Strategic Partnerships with organisations that share our goals and values. We aim to create transformational change through these relationships, drawing on the full range of support from our colleagues across Berkeley.

Our current Strategic Partners are The Change Foundation, Crisis, Imperial College London, The Mayor's Fund for London, MyBnk and The Lord's Taverners.

### Community Partnerships

Each Berkeley Group operating business selects a local charity to partner with. These are usually small-to-medium sized organisations working in the local areas, and provide a focus of staff fundraising and volunteering.

### Resilience Fund

Our newest funding programme offers grants and support to small-to-medium sized charities to invest in their organisational development, building resilience for the future.

### Development Fund

A flexible funding pot that allows the Foundation to explore new ideas and respond to opportunities that don't easily fit into the three main funding streams.



Gifted Young Generation

## Our model



### BERKELEY GROUP

Provides core funding and support services to the Foundation

Pays the Foundation's overheads

### BERKELEY STAFF

Share their time, skills and networks, raise money, and make donations



### MAKE GRANTS

We make grants to expert charities, supporting their work with young people and communities

### MATCH FUND

We match-fund Berkeley staff fundraising, volunteering and payroll giving contributions

### PARTNER

We develop long-term partnerships with charities that share our vision and values

### CONNECT

We build connections between our charity partners and the Berkeley business

### CONVENE

We convene our charity partners and others to meet, network and share expertise

### SHARE LEARNING

We share learning from our programmes and partnerships in order to influence policy and practice

Our vision is that young people and their communities will have the tools and resources they need to thrive and be a force for change in the world.



Key4Life

# Thank you

We have developed this strategy in consultation with a wide range of people within the Berkeley Foundation and Berkeley Group, and from across our charity partners.

We would particularly like to thank:

- Colleagues at the Institute for Voluntary Action Research who carried out an evaluation of our first ten years, the findings from which have informed this strategy
- The very many representatives of current and past charity partners who participated in the evaluation process, generously taking part in surveys and focus groups and sharing their recommendations for the future
- Staff members from across the Berkeley Group, including our fantastic Berkeley Foundation Champions, who have shared feedback throughout the process of developing this strategy
- The Berkeley Foundation team and our Board of Trustees, for helping us to chart a clear way forward.





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Supported by



The Berkeley Foundation is the working name of  
The Berkeley Charitable Foundation, a registered charity in  
England and Wales (Charity Number 1152956) a registered  
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