Reflecting on our Resilience Fund – 2024 applicants and success rates

The Berkeley Foundation is committed to understanding the equity of our grant making. We are at the start of this journey and have embraced learning from other funders that are successfully targeting their funding to address structural inequity.

As a starting point, we have adopted the Diversity Equity and Inclusion (DEI) Data Standard and use it to understand who is applying to us and who our funding is reaching. The Standard provides a framework to monitor equity considerations in grant making. By using it, we hope to identify areas for development within our own funding practice, ensuring it is fair and equitable. You can find more information about the DEI Data Standard **here**.

We started using the Standard in January 2024 to collect data on organisations applying to the third year of the Resilience Fund.

What we asked applicant organisations

Using the **categories identified in the DEI Data Standard**, we asked applicants to complete an optional DEI monitoring form so that we could better understand the communities they support and their leadership. Information gathered did not inform the decision-making process.

Communities supported

We wanted to know if 75%* or more of the people receiving support, or those being intentionally targeted by organisations applying to us, share a particular identity or lived experience.

Leadership (key decision-makers)

We wanted to know if the organisations were 'led by' people who share a particular identity or lived experience (in this instance, 'led by' is defined as being where 75%* or more of the Board/Management Committee AND 50% of senior staff share a particular identity or lived experience). Organisations could, if they wished, provide further information using the free text box in the form.

*This figure of 75% - or 3 in 4 people – is used widely across the funding sector and was decided upon after consulting with a wide range of groups. We know this can only be an estimate.

About the data collected

Set out below, is a summary of the first set of data collected through the third year of our Resilience Fund. 78 applications were received between 8 January 2024 and 2 February 2024. Only one organisation chose not to answer the DEI questions.

Overall, only 62% of the 78 applications received at Stage 1 were considered eligible. This suggests we could do more to clarify our programme criteria and potentially improve communications to targeted communities.

Initial analysis

The first two graphs below show how the success rate of applications at Stage 1 compared to the data we collected about communities supported and the organisation's leadership.

The third graph shows how our funding compared to the data collected. Five organisations received funding.

Please note that the individual percentages will total more than 100% because the groups are not mutually exclusive – for example, an organisation may support communities with multiple identities e.g. young people and migrants.

Graph 1: Communities the work supports - Stage 1 applications vs Invitations to Stage 2

(Percentage of Stage 1 applications and applicants invited to Stage 2 that supports a specific community)
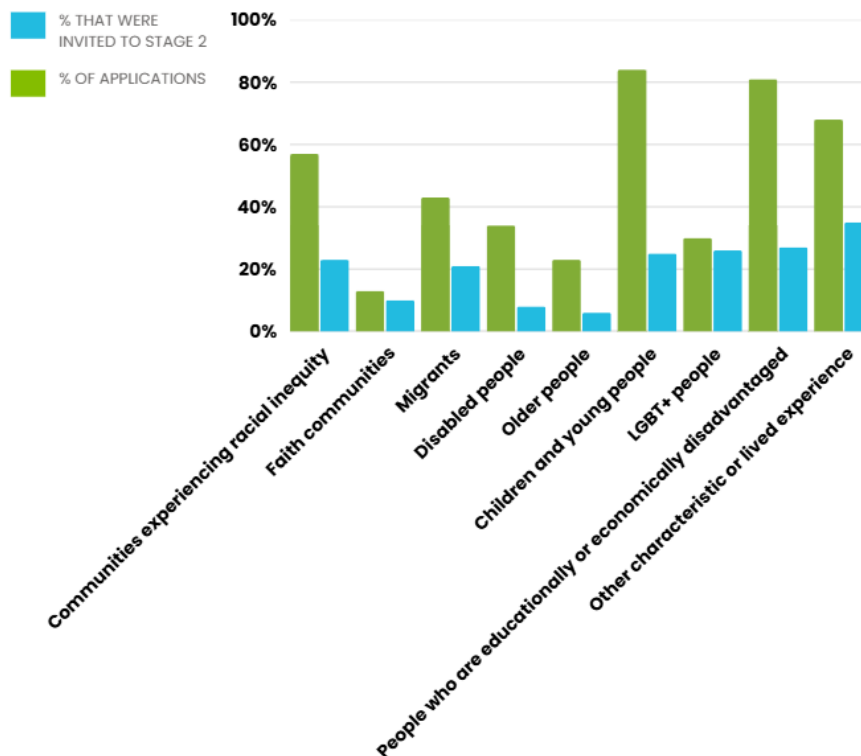
Graph 2: Organisational leadership - Stage 1 applications vs Invitations to Stage 2

(Percentage of Stage 1 applications and applicants invited to Stage 2 where an organisation's leadership has a shared identity or lived experience)
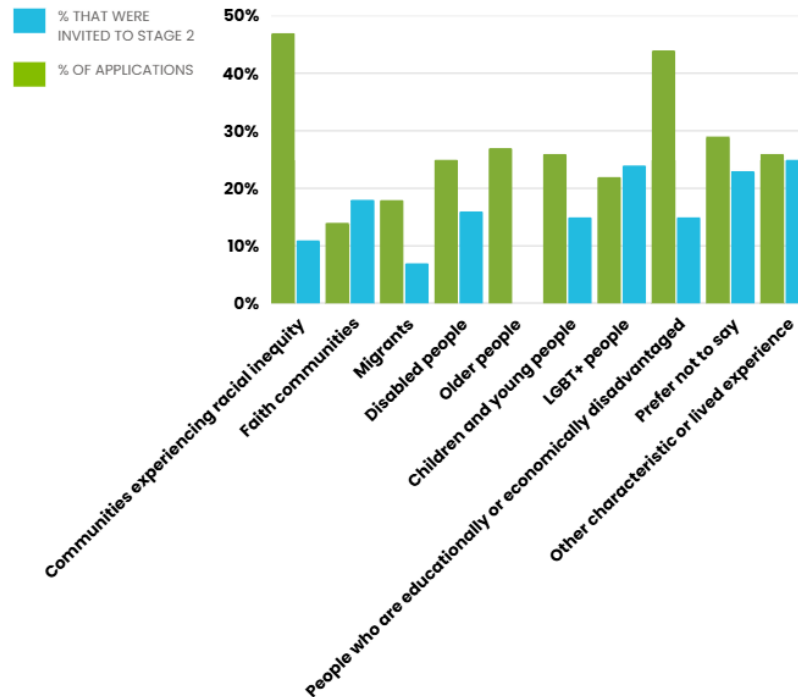
Graph 3: Funded organisations – Communities supported vs Organisational leadership

(Percentage of grants awarded going to specific communities and organisations led by people with a shared identity or lived experience)
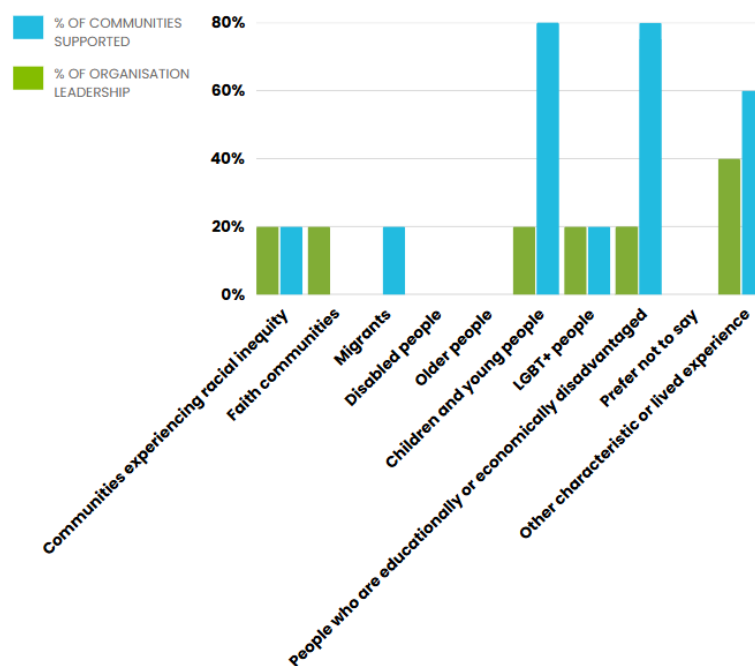
Key learnings and next steps

- Through the 2024 Resilience Fund, 80% of grants were awarded to organisations supporting communities working with children and young people. 80% of grants also supported communities facing educational or economic disadvantage. This aligns with the fund's focus on youth homelessness, and was also reflected in the applications received.

- For organisational leadership, only 20% of grants awarded went to organisations led by people from these communities. A higher proportion of grants were awarded to organisations where the leadership shares another characteristic or lived experience not defined by the Data Standard.

- For the communities supported by the successful applicants, the largest disparity between our funding and the applications received was for those experiencing racial inequity. While they accounted for 57% of the applications, they only received 20% of our funding.

- This follows a similar trend for leadership, where people experiencing racial inequity made up the leadership of 20% of grants awarded, but 47% of applications received.

- We will continue to collect DEI data through our application process, and we plan to launch a DEI monitoring form. This will be shared with our existing charity partners, to gain a greater understanding of how equitable our funding is, and to identify gaps. This will help to inform our future approach.

Overall success rates in Year 3

- 62% of applications were eligible for funding (48/78)
- 48% of eligible applications were invited to Stage 2 (23/48)
- 52% of Stage 2 applications were shortlisted (12/23)
- 42% of shortlisted applicants were successful (5/12)
- 10% of eligible Stage 1 applications were successful (5/48)
- Stage 2 applicants had a 22% chance of being successful.

This has been a useful learning exercise for us and we will consider how to improve success rates through future funding programmes.