Berkeley Foundation

Resilience Fund

Guidelines

"Resilience has become the backbone of our work this last year. We now have an agreed strategy, new trustees and a new governance model with clear accountability for trustees."

Year 1 Resilience Fund Partner

About the Berkeley Foundation

The Berkeley Foundation is the grant-making foundation established in 2011 by the Berkeley Group. Our vision is that young people and their communities will have the tools and resources they need to thrive and be a force of change in the world.

We work in the areas where Berkeley Group operates – across London, Birmingham and the South of England. Our funding comes from two main sources. The Berkeley Group provides core funding, and Berkeley staff support our work through fundraising and volunteering events, and through payroll giving. Berkeley Group matches all staff fundraising and covers the Foundation's overheads so that every penny raised is spent on charitable activity. Find out more on our website: www.berkeleyfoundation.org.uk.

We believe in long-term partnerships, and work to build reciprocal, trust-based relationships with the charities we support. We aim to add value through our relationship with the Berkeley Group, including through staff fundraising and volunteering, and brokering jobs for young people. We work with our partners to evaluate and learn from the work we do together, and use this to inform and improve our strategy and funding decisions, as well as sharing insights more widely.

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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.

Five impact goals

1 A safe place to call home

2 Journey to employment

3 Health and wellbeing

4 Youth leadership

5 A resilient voluntary sector

Five commitments about the way we'll work

1 We'll work in partnership with expert charities, investing in their work to help young people thrive

2 We'll add value to our partnerships through our expertise, networks and relationship with the Berkeley Group

3 We'll learn from our work and share our learning across the public, private and voluntary sectors

4 We'll ensure that diversity, equity and inclusion is at the heart of everything we do

5 We'll enable young people to play an active role in the Foundation's work

Our values

Have integrity   Be effective   Be bold   Empower people   Progress through learning

Our mission

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

Our 2030 Strategy

Our 2030 Strategic Plan has five impact goals, one of which is 'A resilient voluntary sector'. You can view our 2030 Strategy **here**.

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Resilience Fund

In January we are launching the third year of the Resilience Fund. This fund represents a £900,000 investment in strengthening the voluntary sector over four years. It aims to support small-to-medium sized organisations to invest in organisational development and build resilience for the future.

This year, we are looking to support up to six organisations working with young people who are experiencing or at risk of homelessness, and who face multiple layers of discrimination and inequality.

Each organisation will receive up to £60,000 over two years to build organisational resilience. Please note we are unable to consider applications for frontline delivery.

The funding will run alongside a bespoke learning and evaluation programme, focused on highlighting best practice and supporting peer learning. Successful applicants will be able to access additional resources from the Berkeley Foundation and, where there is alignment of skills and needs, pro bono support from the wider Berkeley Group.

More than funding

Successful applicants will have a dedicated Partnerships Manager, who will be your main point of contact throughout the duration of the grant. Your Partnerships Manager will aim to meet with you twice a year to discuss the progress of your project and how we may be able to support you.

Pro bono skills and expertise from Berkeley staff

We want our charity partnerships to be about more than just funding. The Berkeley Group has over 2,500 members of staff who may be able to assist your organisation with volunteering, mentoring and skill sharing. We are open to discussing how we might provide further support to your organisation.

Learning programme

We will be funding up to six organisations, some of whom may be going through similar experiences and facing similar challenges. We would like to bring the cohort of funded organisations together at key points during the programme, to share and learn from each other. Successful organisations will attend up to two learning sessions in each year of the funding period.
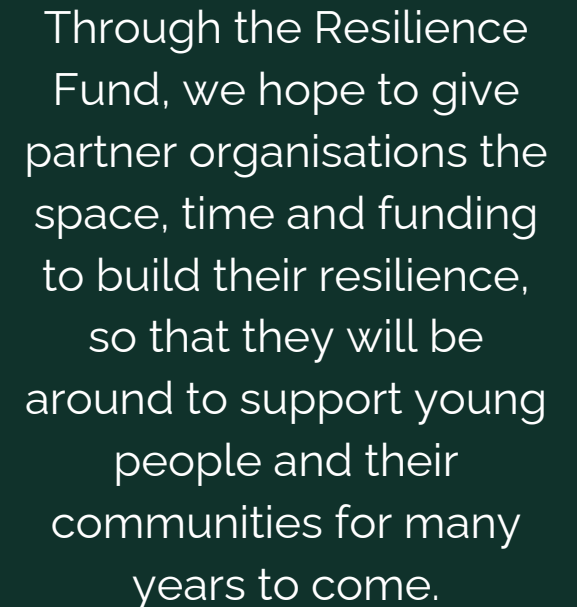
Our goal

What do we mean by 'resilience'?

Our overall goal is that participating organisations will have an 'improved ability to anticipate, prepare for, respond and adapt to incremental change and sudden disruptions in order to survive and prosper' (Cranfield University, 2017).

We believe that building resilience provides an opportunity for organisations to invest in long-term sustainability, over short-term effectiveness.

There is no one single success formula for organisational resilience; however, considerable work has been done across the sector to identify the key building blocks. These include, but are not limited to, the five objectives overleaf. We will consider funding projects working towards one or more of these building blocks.

Through the Resilience Fund, we hope to give partner organisations the space, time and funding to build their resilience, so that they will be around to support young people and their communities for many years to come.

Building blocks for resilience

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Building blocks	Examples of work we might fund
A clear mission operationalised through strong strategic planning	• Refining your mission and vision • Understanding your wider operating environment • Strategic planning
Financial sustainability	• Developing fundraising strategies • Diversifying income streams
Effective leadership	• Governance reviews • Trustee recruitment and training • Leadership development • Youth voice and participation
Operations that are fit for purpose	• IT systems and capabilities • Comms and Marketing • HR processes • Impact and performance management
People and culture that meet your needs	• Staff training and development • Staff wellbeing and resilience • Recruitment and retention

Eligibility criteria

In order to apply to the Resilience Fund, your organisation must:

- be a registered charity or community interest company (CIC) with an annual income between £100,000 - £1.5m;
- have at least one year of published accounts;
- cover and deliver in at least one of the following geographical areas – Greater London, Berkshire, Buckinghamshire, Hertfordshire, Oxfordshire, Somerset, Surrey, Kent, Hampshire, West Sussex, Warwickshire and the City of Birmingham;
- be focused on working with young people who are experiencing or at risk of homelessness, and who face multiple layers of discrimination and inequality;
- be able to demonstrate that you operate in a way that actively promotes equity, diversity and inclusion;
- apply for funding towards organisational development work and not frontline delivery;
- apply for funding over two years;
- not request more than 20% of your overall turnover in any one year;
- have a safeguarding policy in place before the start of the proposed project;
- not have had support from Berkeley Foundation's Capacity Building Fund in the past.

Priorities

We will prioritise funding for organisations that are:

☑ working with LGBTQ+ young people; and/or
☑ employing a multi-agency approach to tackling youth homelessness.

What we can't fund

☒ Local Authorities and other statutory agencies;
☒ schools;
☒ organisations with an annual income of under £100,000, or over £1.5m;
☒ new organisations without at least one year of published accounts;
☒ organisations that do not work in our specified geographical areas;
☒ individuals;
☒ capital projects;
☒ work that has already begun;
☒ organisations that do not have an up to date safeguarding policy;
☒ organisations who have already benefitted from our Capacity Building Fund;
☒ organisations that deliver services outside of the UK.

Is this the right fund for you?

We understand that organisational development work requires commitment and capacity. We want to partner with organisations that are ready to undertake this type of work.

We encourage organisations to consider the following questions before submitting an application:

☑ **Eligibility**: Do you meet the eligibility criteria for the fund?

☑ **Feasibility**: Does your organisation have the infrastructure and resource in place to carry out this organisational development work?

☑ **Capacity**: Does your organisation have the capacity to fully participate in our learning programme?

☑ **Need**: Have you thought about your organisational development needs? The diagnostic tools and resources available at the end of this document might support your application to the Resilience Fund.

How to apply

☑ This year we are operating a two-stage application process. The first stage includes an eligibility check, accessibility and EDI questions, organisational details, and four questions about your proposal.

☑ We ask all organisations to submit their Stage 1 application via the Berkeley Foundation website. If you have difficulties accessing the online form, please contact us at **info@berkeleyfoundation.org.uk** or call us on **01932 868 555** and we will be happy to explore alternative ways for you to submit your application. A full application form in Word format will be available on the website from 8 January.

☑ Guidance on completing the application has been incorporated into the application form. Please click on the information icon ⓘ for additional support.

☑ After you submit your Stage 1 application, you should receive an email, which contains a copy of your application responses. If you do not receive this email, please check your spam folder. If you have not received the email within 24 hours, please contact the Foundation to ensure we have received your application.

☑ Organisations that have been longlisted at Stage 1 will be invited to submit a full application at Stage 2. A separate link and access code will be shared with longlisted applicants.

☑ You will be required to submit a fully developed budget with your application at Stage 2. Through our Core Cost Commitment we fund up to 20% of core costs as part of every grant we make, so please include a line on core costs in your budget.

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Two-stage application process

Stage 1

Eligible organisations can apply between **8 January 2024 (12 noon)** and **2 February (5pm),** via the Berkeley Foundation online portal

Four key questions

Based on past experience, we expect to longlist c.40 organisations at Stage 1 and invite them to submit a Stage 2 application.

Unsuccessful organisations will be notified of the outcome and offered general feedback.

Stage 2

Longlisted organisations can submit between **15 February 2024 (12 noon)** and **8 March (5pm),** via an access code supplied by the Foundation team

Six additional questions

Based on past experience, we expect to shortlist c.12 Stage 2 applicants. Shortlisted organisations will be asked to provide additional supporting documents and meet with the Foundation team.

Feedback will be offered to all Stage 2 applicants.

Who will be assessing your application?

Each application will be assessed by at least two members of the Berkeley Foundation partnerships team.

Once organisations have been shortlisted for funding, an external panel with representatives from the Foundation's existing charity partners will apply their own experience of working with young people who are experiencing or at risk of homelessness, as well as their knowledge of the voluntary sector, to make funding recommendations.

The external panel's funding recommendations will be presented to the Foundation's Finance, Audit and Risk Committee for a final decision in **May 2024**.

Following the meeting, decisions will be communicated in writing to both successful and unsuccessful applicants. General feedback will be provided to all applicants.

Young people from our partner St Basils, a charity based in Birmingham working with young people to help them grow their confidence, develop their skills, increase opportunities and prevent homelessness, have provided invaluable support to the development of the Fund and will continue to share their expertise and knowledge during the application and assessment process.

What we are looking for

Your proposal and budget will be scored against the following assessment criteria:

Assessment criteria	Description
Organisational need	We will be looking for evidence that your organisation has a clear resilience need that aligns with our building blocks.
Organisational impact	We will be looking to understand the impact that this work will have on your organisation and how you will be more resilient as a result.
Feasibility of project	We will consider the costs and timescales of this work, alongside your organisation's capacity to deliver it.
Alignment with the fund's theme and criteria	We will take account of the specific services you deliver to support young people who are experiencing or at risk of homelessness, and who face multiple layers of discrimination and inequality.
Approach to diversity, equity and inclusion	We ask you to demonstrate that your organisation actively promotes equity, diversity and inclusion, ensuring that young people feel safe to access its services regardless of their ethnicity, background, gender, or sexual orientation.
Alignment with the Fund's priority areas	We will seek evidence of your organisation's work with LGBTQ+ young people and/or a multi-agency approach to tackling youth homelessness.

Key dates

The Resilience Fund is open for Stage 1 applications between **8 January 2024 – 2 February 2024**.

Please apply by 2 February 2024 for a decision in May 2024.

- **Applications open 8 January 2024**
- **Stage 1 Q&A webinar 16 January 2024**
- **Stage 1 deadline 2 February 2024**
- **Stage 1 decision Mid-February**
- **Invitation to Stage 2 Mid-February**
- **Stage 2 Q&A webinar 20 February 2024**
- **Stage 2 deadline 8 March 2024**
- **Assessment panel 9 May 2024**
- **Final decision End of May 2024**

Summary

☑ We are looking to support up to **six organisations** working with young people who are experiencing or at risk of homelessness, and who face multiple layers of discrimination and inequality.

☑ Each organisation will receive up to **£60,000 over two years** to build organisational resilience. We are unable to consider applications for frontline delivery.

☑ The application portal will be open between **8 January 2024 at 12pm** and **2 February 2024 at 5pm** for Stage 1 applications. Longlisted organisations will be invited progress to Stage 2 in mid-February.

☑ Initial grant payments will be made in June 2024.

☑ We will be hosting a Q&A webinar about the Resilience Fund on **16 January 2024**. Please save the date and sign up via our website from 8 January.

FAQs

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Q: Do you have any examples of similar projects you have funded in the past?
A: Yes we do. You can read about the Resilience Fund projects we are currently supporting on our website.
Q: £60,000 will not cover the total amount needed to deliver our project. Are we still eligible?
A: If your grant request doesn't cover the total cost of the project, we would like to see that you have other funding in place, or a clear funding pipeline. We look very positively on applications where there are other funders involved; however, we will also consider applications where we are the sole funder.
Q: Is there a deadline for when funds should be spent?
A: No, there is no hard deadline by which funds should be spent. You will have two years for the delivery of your projects and we anticipate that all projects will be concluded by April 2026.
Q: Are newly registered organisations eligible to apply?
A: Newly registered organisations will be eligible to apply if they have at least one set of published accounts.
Q: Our organisation delivers work in some of your geographical areas, but also outside your areas. Are we still eligible?
A: Yes, you are eligible for funding. However, we will prioritise organisations that are fully aligned with our geographical areas.
Q: Do you have any resources that will help us to apply?
A: Yes, we do. Please find below a budget template, which includes our core cost commitment, and a list of external tools which will help you to explore your resilience needs in detail,

Resources

The following diagnostic tools and resources may help support you to think about your organisational development needs and develop your application

- VSCE Strengths Checker - https://vcsestrengthchecker.org.uk/
- SWOT Analysis - https://www.cipd.org/uk/knowledge/factsheets/swot-analysis-factsheet/
- NSPCC's safeguarding and child protection assessment tool - https://learning.nspcc.org.uk/safeguarding-self-assessment-tool
- The Governance App - https://thegovernanceapp.org.uk/
- CAF Resilience programme – https://www.cafonline.org/charities/strategic-consultancy/caf-resilience-programme/report
- Lloyds Bank Foundation Organisational Resilience guide - https://www.lloydsbankfoundation.org.uk/media/oxpnlp4e/lbf-organisational-resilience-guide-2022.pdf
- NPC Resource Hub - https://www.thinknpc.org/resource-hub/
- The Decelerator tools and guides - https://decelerator.org.uk/tools-and-guides

Budget template

- We encourage full cost recovery models and will fund core costs as a percentage of overall project costs. This means you can include staff time and office costs if relevant. We will fund core costs at a maximum of 20% of the overall grant.

- Please ensure that your budget includes a breakdown of expenditure by year. As a reminder, you can apply for up to £60,000 over two years.

- Your total expenditure figure should match your total income figure. If you have not yet secured 100% funding for the project, you should demonstrate where you think the remaining funding will come from and label the status as 'pending'.

JOE BLOGGS CHARITY – Strategic development & IT project

PROJECT INCOME

Income source	Year 1 (£)	Year 2 (£)	Total (£)	Status
Joe Bloggs Foundation	5,000	-	5,000	Confirmed
Berkeley Foundation	15,000	12,861	27,861	Pending
Own reserves	1,637	-	1,637	Confirmed
Total Projected Income	**21,637**	**12,861**	**34,498**	

PROJECT EXPENDITURE

Expenditure	Description	Year 1 (£)	Year 2 (£)	Total (£)
Direct costs				
Salary Costs - MD additional time for strategy	0.5 day uplift between Jan – May 2023 @ £40.3/hr	2,313	-	2,313
Salary Costs - BDD additional time for strategy development & implementation	0.5 days a week - 12 months * £39.9/hr	6,867	-	6,867
Salary Costs - backfill FD time for IT project	0.5 day a week 21 months * £28.4/hr	4,882	3,661	8,543
Consultancy Costs - Strategic and Governance review	4 days * £500 / day	2,000	-	2,000
Service costs – IT upgrade project	£8,000 budget	2,000	6,000	8,000
Service costs – Staff training	£2,277 budget	2,277	-	2,277
	Total direct costs (£)	**20,339**	**9,661**	**30,000**
Core costs				
Administration support @ 5%	Admin support towards strategy development	1,016	483	1,499
Office and premises overheads @ 10%		2,033	966	2,999
	Total core costs (£)	**3,049**	**1,449**	**4,498**
	Total Expenditure (£)	**23,388**	**11,110**	**34,498**

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Contact details

If you have any questions about the Resilience Fund, or would like to discuss your proposal before submitting an application, please contact us and we will be happy to help.

E: info@berkeleyfoundation.org.uk

T: 01932 868 555