

# Strategic Plan 2010/ 2013

incorporating the Operational Plan 2010/2011



## Introduction

2

The **Barrow Cadbury Trust** (the Trust) is an independent charitable foundation, committed to supporting vulnerable and marginalised people in society. The Trust provides grants to grassroots voluntary and community groups working in deprived communities in the UK, with a focus on the West Midlands. It also works with researchers, think tanks and government, often in partnership with other grant-makers, seeking to overcome the structural barriers to a more just and equal society.

The Trust was founded in 1920 by Barrow Cadbury and his wife Geraldine Southall Cadbury. Barrow was the grandson of John Cadbury, the founder of the family-run chocolate business in Birmingham where Barrow worked for almost 50 years, succeeding his uncle George as Chairman in 1918. He and Geraldine were committed Quakers who chose to live modestly themselves and establish the Trust. In time, their children became Trustees and their son, Paul Cadbury, took over as Chair in 1959. Paul, his sisters and many of their descendants have all given time to being Trustees and added generously to the Trust's endowment. The concerns of the founders and five generations of their family are still reflected in the work of the Trust today.

This Strategic Plan sets out how, in the next three years, the Trust intends to build on the legacy of Barrow and Geraldine in order to promote social justice and support disadvantaged communities to influence policy, in the Quaker tradition of speaking truth to power.

3

## Planning Format

- 4 The **Barrow Cadbury Trust** has adopted a three-year rolling planning timescale, with three levels:
- a three year strategic plan;
  - annual operational plans;
  - and individual staff workplans for the year.
- Strategic and operational plans will be published on the Trust's website for the information of grant applicants and other stakeholders.
- This Strategic Plan for 2010/2013 sets out the vision, values and mission of the Trust and its strategic objectives for the next three years. It will be reviewed in a year's time and the next Strategic Plan for 2011/2014 will then roll forward.
- This Strategic Plan should be read in conjunction with the Operational Plan for 2010/2011 found below, which sets out, under each of the strategic objectives, the operational objectives to be achieved during the year, the approaches to be taken, and achievements against objectives made. Progress will be regularly monitored and reported to each Trustee meeting, outcomes will be evaluated towards the end of the year and this evaluation will inform the rolling-forward of the plan for the next three years.

## Vision, Mission, Values and Cross-Cutting Themes

The Barrow Cadbury Trust's vision is of a peaceful, equitable society, free from discrimination and based on the principle of social justice for all.

The Trust's mission is to promote social justice through grant making, research, influencing public opinion and policy and supporting local communities.

The values which underpin the work of the Trust are as follows:

**Promotion of social justice** – the Trust aims to put fairness and equality at the heart of all its work.

**Empowerment** – the Trust seeks to uphold and extend the rights of marginalised groups, to reflect the grassroots experience of local communities and to support them in making their voices heard.

**Partnership** – the Trust works in partnership with other grant-makers and with stakeholders at international, national, regional and local levels.

**Local focus** – the Trust values its historic relationship with Birmingham and the West Midlands.

**Relationship with funded groups** – the Trust aims to be an approachable, fair and responsive grant-maker.

5

6

**Valuing learning** – the Trust aims to be a learning organisation open to the exchange of information and ideas, with its work grounded in a solid evidence base.

**Innovation and independence** – as an independent grant-maker, the Trust is alive to emerging needs and new ideas and ways of working and is willing to take risks in pursuit of social justice.

**Quaker ethos** – while there is no requirement for Trustees or staff to be Quakers, and most are not, the Trust values its historical roots within the Quaker ways of working and tradition of social and penal reform.

The Trust has a particular interest in the following themes across its work:

- ▬ supporting the independence and diversity of the voluntary sector
- ▬ addressing gender-based disadvantage
- ▬ addressing disadvantage based on race and ethnicity
- ▬ funding groups, projects and programmes in Birmingham and the West Midlands.

## Strategic Objectives

The Trust has four strategic objectives for 2010/2013. These are underpinned by a number of operational objectives which are set out in the Operational Plan for 2010/2011, found below.

### Strategic Objective 1

To support people who are within, or at risk of entering, the criminal justice system, to improve their life chances, with a particular focus on young adults.

7

### Strategic Objective 2

To help ensure that migration is managed in a way that is equitable and socially just and that the voices of both migrants and receiving communities are heard in the public debate.

### Strategic Objective 3

To support effective approaches to combating poverty and inequality and assist in building inclusive communities.

### Strategic Objective 4

To ensure that the organisation is fit for purpose to deliver its Strategic Plan, to support Trustees in their stewardship of the Trust and to support staff to work efficiently and effectively.



# Operational Plan 2010/ 2011

The Operational Plan for 2010/11 should be read in conjunction with the Strategic Plan for 2010/13. Activities will be added quarterly as indicated. Quarterly updating may be viewed on our website [www.barrowcadbury.org.uk](http://www.barrowcadbury.org.uk)

# Strategic Objective 1

To support people who are within or at risk of entering the criminal justice system to improve their life chances, with a particular focus on young adults.

10

	Operational Objectives	Approach	Planned activities and/or initiatives
1.1	To strengthen and raise the profile of the Transition to Adulthood (T2A) Alliance campaign to draw attention to the case for vulnerable young adults to be seen as a distinct group requiring targeted interventions.	Plan and coordinate the T2A Alliance and sub-group meetings with the respective Chairs.	T2A Alliance meetings programmed.  Policy and practice meetings programmed.
		Integrate the work of the policy and practice groups so that each supports and furthers the objectives of the other.	Campaign plans have been developed with close involvement of both Chairs.
		Work with key Alliance partners to ensure delivery of the T2A campaign objectives.	Campaign plan finalised with lobbying, media and evidence based strands.
		Contribute thinking on new initiatives, tactics and opportunities.	Local seminars and a national conference.  New briefing papers being produced.  Draw more on expertise of Alliance partners.
		Monitor and oversee the BCT funded work of Alliance members to achieve maximum T2A campaign impact.	Link funded work more closely to campaign plan.
		Identify opportunities to commission new pieces of work, further the campaign objectives and fill key knowledge gaps.	Throughout 2010.

Operational Objectives	Approach	Planned activities and/or initiatives
1.2 Strengthen young adult involvement in the campaign activities.	Engagement in the T2A consultations.	Service user perspective section of formative evaluation completed 31st May 2010.
	Opportunities for young adults to speak at events.	Young adults have been, and will continue to be, speakers at national and regional conferences and events.
1.3 Ensure the three T2A pilots are operating effectively in terms of governance, leadership and delivery and that the appropriate links are made with the work of the T2A Alliance.	Support the ongoing work of the pilots.	Steering group meetings attended.
	Link the work of the pilots more closely into the work of the practice group in particular.	Pilot involvement in T2A practice group.
	Work with the pilots to identify opportunities for media coverage and wider awareness of tailored services.	Local seminars and national T2A conference. Media briefings and site visits.
1.4 Ensure the formative and summative pilot evaluations are effectively supported and that they complement each other.	Periodic meetings with evaluators.	Oxford University formative evaluation underway, and interim reports completed.
	Evaluator periodically reports to T2A Alliance meetings.	Catch 22 impact evaluation process commenced 1st April 2010.
1.5 Work with other grant making trusts and penal reform organisations to take forward the recommendations of the Corston report on women offenders.	Attend Corston Coalition meetings and contribute to the programme of work and direction.	Corston Coalition meetings attended and contributions made to the Coalition's strategy.

	<b>Operational Objectives</b>	<b>Approach</b>	<b>Planned activities and/or initiatives</b>
<b>1.6</b>	To support and work in partnership with other organisations with shared goals in penal reform.	Participate in and support Criminal Justice Alliance, APPG on Penal Affairs, ACF and others.	Member and participant of CJA.  APPG meetings attended and contributions made to ACF Penal Affairs Group.
<b>1.7</b>	Support grassroots groups working with young adults involved in, or at risk of involvement, in criminal activity.	Main and small grant funding.  Supporting the key consortium of young adults funded groups.  Funder plus activity such as training, referral.	Continue to support some funded groups whose grants are coming to an end in line with the strategic objectives of the Trust.  Identify a small number of new groups for grant funding, particularly groups working with young women.  Oversee the development of the key consortium.
<b>1.8</b>	Support research that explores and raises awareness of young women involved in or affected by gang activity.	Funding and oversight of research.  Application of communications strategy to promote findings.  Promotion of young women as a target group for activity relating to gang activity.	Oversight of the Race on the Agenda (ROTA) 'Female Voice in Violence' project.

# Strategic Objective 2

To help ensure that migration is managed in a way that is equitable and socially just and that the voices of both migrants and receiving communities are heard in the public debate.

Operational Objectives	Approach	Planned activities and/or initiatives
<p><b>2.1</b> To support local groups working with refugees, asylum seekers, undocumented migrants and other disadvantaged migrants to address unmet needs.</p>	<p>Support to grassroots groups, particularly those campaigning for policy change.</p> <p>Training, network and capacity building.</p>	<p>Grassroots funding primarily in the West Midlands.</p>
<p><b>2.2</b> To support regional, national, European and international groups and networks to lobby for long term policy change that ensures that migration policy is socially just and equitable.</p>	<p>The Trust will also identify groups that promote migrant voice and/or represent innovative approaches to migration and integration issues.</p> <p>Convening work to ensure groups can access policy, research and the media and to promote relationships between funded groups.</p>	<p>Proposed policy partnership with the Transatlantic Council on Migration, an initiative of the Migration Policy Institute.</p> <p>Ongoing engagement with the Diversity Migration and Integration Interest Group (DMIIG) at the European Foundation Centre (EFC).</p> <p>DMIIG meeting planned for May 2010 and high-level public event on migration during EFC's Foundation Week in June 2010.</p>

	Operational Objectives	Approach	Planned activities and/or initiatives
2.3	To support research and initiatives that promote a constructive evidence-based debate on migration.	<p>Building an evidence-base through research and policy work informed by the external environment and emerging trends.</p> <p>Building a communications infrastructure with the long term aim of changing public attitudes on immigration to improve behaviours on the ground and encourage political leadership.</p>	<p>In collaboration with other funders, the Trust is supporting the Migration Observatory at Oxford project, which will be an authoritative data source on migration at Oxford University. The Trust is also actively contributing to Transatlantic Trends: Immigration, an internationally comparative poll on attitudes to immigration and integration in the UK, Europe and North America.</p> <p>The forthcoming editorial partnership with the global international affairs website OpenDemocracy will be developed as a forum for debate and the dissemination of new evidence.</p> <p>The programme will continue to have a significant research and policy component, through partnerships with key think-tanks and researchers.</p>
2.4	To identify the impacts of migration on disadvantaged communities and support effective responses to them.	<p>In conjunction with the Trust's Poverty and Inclusion programme, grassroots and policy work to identify good practice in immigrant integration in the UK and elsewhere.</p> <p>To promote a more informed understanding and analysis of the social impacts of migration on different communities.</p>	<p>Ongoing engagement with the Cities of Migration project. The Trust will help develop the programme for its international conference in the Hague in October 2010.</p> <p>The Trust's political work will identify emerging trends and key issues in light of projected public sector cuts and the change in Government. These will inform convening work and/or research projects.</p>

# Strategic Objective 3

To support effective approaches to combating poverty and inequality and assist in building inclusive communities.

Operational Objectives	Approach	Planned activities and/or initiatives
<p><b>3.1</b> To support local groups working in their communities to address cohesion, empowerment and social inclusion.</p>	<p>Targeted investment in priority geographic areas of Birmingham and the Black Country through grant-making, outreach and funder plus activity.</p>	<p>Main and small grant funding for groups identified in areas of interest to the Trust.</p> <p>Work with grantees and partners to test new and existing models for effective and inclusive.</p> <p>Funder plus activity – provided by the Trust and external providers &amp; partners – convening, workshops, referral, training. In particular bringing the expertise of national groups and organisations together with local supported groups to raise understanding of how to operate effective community solutions in the context of public sector cuts and the economic recession.</p>
<p><b>3.2</b> To support research and policy work that raises the understanding of and builds an evidence base for investment in community based solutions to cohesion, empowerment and social inclusion.</p>	<p>Supporting and contributing to research and policy work, unilaterally and with other funders and partners.</p> <hr/> <p>Using the Trust’s communications strategy to disseminate findings, recommendations and learning to a wide range of stakeholders.</p>	<p>Commissioning of new research in social assets, community resilience, co-production and other emerging models that contribute to building a case for community based solutions.</p> <hr/> <p>Disseminate information and learning from pieces of completed research to a wide range of stakeholders.</p>

	<b>Operational Objectives</b>	<b>Approach</b>	<b>Planned activities and/or initiatives</b>
<b>3.3</b>	To contribute at local and national level to discourse on community based solutions to building strong and inclusive communities.	Raise awareness of developments in building strong and inclusive communities. Bringing the voice of grassroots groups to the attention of policy makers.	<p>Develop partnerships with others interested in community based initiatives from a social justice perspective.</p> <p>Work with existing partners to understand the impact of public sector cuts and the financial recession on social cohesion and communities' ability to be resilient.</p> <p>Contribute directly and enable groups to contribute to national discussions through communications and media strategy.</p> <p>Support and develop the Habits of Solidarity Network.</p>
<b>3.4</b>	To promote sustainable development principles to third sector organisations and assist them with carbon footprint reductions	<p>Raise awareness of climate change as an issue relevant to all communities and organisations.</p> <p>Contribute to a public debate about structural poverty.</p>	Promotion of findings of Third Sector Task Force. Use of convening role to enable grantees to reduce carbon footprint.

# Strategic Objective 4

To ensure that the organisation is fit for purpose to deliver its Strategic Plan, to support Trustees in their stewardship of the Trust and to support staff to work efficiently and effectively.

Operational Objectives	Approach	Planned activities and/or initiatives
<b>4.1</b> To ensure that the Board is appropriately resourced to effectively govern the Trust and deliver the organisation's objectives.	To provide Trustees with appropriate learning opportunities to carry out their roles effectively by implementing Learning and Development.	Implement Learning and Development Strategy and Trustee Learning and Development Plan.  Provide learning opportunities at Trustee meetings, including expert outside speakers.
	To ensure Trustees are supported to comply with their legal duties.	Maintain and update the Trustee Governance Pack and website.  Ensure strategic and operational risk registers are kept up to date and risks are regularly monitored.  Review risk register on a cyclical basis.  Finalise Fraud Management Strategy and embed any changes as necessary.
	To support the Chair and Committee Chairs to be well informed and effective.	Cyclical briefing meetings with Executive Team and with the Trust's professional advisors as appropriate.

	Operational Objectives	Approach	Planned activities and/or initiatives
4.2	To support and develop staff to ensure they are equipped and motivated to deliver the strategy and full their potential.	To review and further embed the HR framework. To deliver high quality HR support function.	<p>To complete the first full year of the new framework (April 2010) and put individual work plans in place for all staff for 2010/11.</p> <p>To consider any potential improvements to the framework in the light of participant feedback.</p> <p>To canvas the views of all staff on the operation and progress of the Trust by undertaking a staff opinion survey.</p>
		To embed a learning and development culture in the organisation.	<p>To build a learning approach into each staff member's work plan and review and evaluate L&amp;D activity.</p> <p>To further develop evaluation mechanisms with all areas of the Trust's work. To ensure all staff have external learning opportunities outside of formal training (e.g. seminars, events).</p>
		To complete the Trust's staff restructuring successfully.	To provide induction for new posts and integrate the new functions within the existing team.
		To build a strong team and sense of group identity.	<p>2-day off site event for review/reflection.</p> <p>To review the internal meetings structure.</p> <p>Introduce mechanisms for more regular staff/Trustee contact and joint learning/exchange.</p>

Operational Objectives	Approach	Planned activities and/or initiatives
<p><b>4.3</b> To maintain appropriate financial management and investment management arrangements for appropriate and well-informed decision making.</p>	<p>To improve understanding of the Trust’s assets, finances and financial system across the Trust.</p>	<p>To increase access to financial information across the staff team.</p>
<p><b>4.4</b> To evaluate and report on performance of the Trust’s work to inform future strategy.</p>	<p>To further build the monitoring and evaluation approach to enable effective review and management of the Trust’s work.</p>	<p>To focus on evaluation at a Board level event late in the year.</p> <p>To develop a more outcomes focused approach to project evaluation.</p>
	<p>To identify emerging needs and policy changes and ensure the Trust’s work is informed by these.</p>	<p>Work further with think tanks and grassroots groups to keep our thinking up to date and adjust our programme approach accordingly.</p> <p>Work collaboratively with other funders to share our knowledge and theirs productively.</p>

	<b>Operational Objectives</b>	<b>Approach</b>	<b>Planned activities and/or initiatives</b>
4.5	To promote the work of the Trust and its funded partners in order to create a more socially just society.	To develop and deliver effective and appropriate communications and knowledge management strategy (October 2010).	<p>Develop the Trust's knowledge management strategy.</p> <p>Develop the Trust's communication strategy (April 2010).</p>
		Work closely with expert press and PR consultants to maximise the impact of our work in the public policy arena.	<p>Produce, commission, launch and disseminate findings of reports relevant to the Trust's work.</p> <p>Improve the design, content and navigation of our website.</p> <p>Build on our relationships in Birmingham and the West Midlands.</p> <p>Join forces with others to have an impactful presence at party political conferences (Autumn 2010).</p>
4.6	To apply the Trust's ethical values to everything it does in order to better achieve our mission.	To consider all aspects of the Trust's activities from an ethical stand point.	<p>Undertake further work on ethical investment as below:</p> <ul style="list-style-type: none"> <li>– Investment Management Committee to give clearer instructions to investment managers;</li> <li>– Consider possible options for mission related investment;</li> <li>– Make the Trusts first mission related investment (Social Impact Bond);</li> <li>– Explore better use of our office space and resources for mission pursuit (e.g. lending meeting space, etc.).</li> </ul>

Operational Objectives	Approach	Planned activities and/or initiatives
	Promoting a public debate about ethics in public life.	Commission further work to keep issue 'live'.  Engage with the 'Better Banking Campaign'.
	Develop understanding of Quaker ethos.	Build basic guidance into staff and Trustee inductions.  Support the History of the Trust's researchers to document the Trust's Quaker roots.
4.7	To commit to and develop environmentally friendly and sustainable business practices and behaviours.	Reduce the Trust's carbon footprint.  Review ethical procurement policy.  Inform ourselves better about climate change issues.  Support our 'green' champion' to help the Trust reduce our carbon footprint.
	Consider how to support and encourage carbon reduction in the third sector and in communities we support.	Presentations to Trustees and staff to generate internal discussion about activities later in the year.
4.8	To improve the efficiency and effectiveness of operational functions in order to achieve better impact.	Working with the findings and recommendations of our auditors, internal and external, improve administrative procedures.  Finalise Anti-Fraud Strategy.  Review financial procedures.  Improve use of telecommunications.  Introduce customer service standards.  Improve use of IT systems, especially for data management.



FSC logo for  
environmental  
credential of paper



Barrow Cadbury Trust  
Kean House  
6 Kean Street  
London  
WC2B 4AS

T 020 7632 9060  
F 020 7632 9061

[www.barrowcadbury.org.uk](http://www.barrowcadbury.org.uk)