

The Bedford Charity (The Harpur Trust)

Strategic Plan 2010 - 2015

Background

1. After successful implementation of the first 5-year strategic plan from 2004 to 2009, which provided a vital focus for activities and a context for decision making, the trustees of the Bedford Charity agreed to build on these first steps and develop a new strategic plan for the next five years, as a major part of demonstrating their leadership in setting the strategic direction for the Charity.
2. The trustees agreed to appoint an external facilitator, Zöe Willems, to help them to review their Vision, Mission and Values, and to work with the Chief Executive in order to draw out key activities and priorities for the charity that fit within this strategic framework, following a widely used strategic planning model particularly mentioned in the NCVO Tools for Tomorrow toolkit as appropriate for voluntary sector organisations.
3. Two conferences have been held with trustees and key staff, during which the Vision, Mission and Values have been drawn up. Environmental analysis has also been undertaken (including consideration of a report on the general economic situation; a specially commissioned report on the environment for independent schools and implications for Harpur Trust schools in particular; a Young Foundation report on unmet needs in the Bedford area; a survey of staff views; and SWOT analyses for the Charity) and some key options and choices have been examined enabling the trustees to give a clear strategic steer at their Governing Body meetings.
4. Some difficult decisions have been made as a result, which will require resolve, sensitivity and expertise to implement. It is all the more important, therefore, to have a clear strategic plan setting out the future direction and the reasons for such decisions being made. The plan will need to be supported from the top of the organisation and communicated and adopted throughout the organisation. It will also be vital in both informing and driving external communications.
5. This document brings together the agreed Vision, Mission and Values, with a top level break down of activities, outcomes and measures which can be seen to flow from them. These headline activities will then inform the more detailed business planning to be carried out by the executive team.

Vision, Mission and Values

Who we are

The Bedford Charity is a local foundation that uses the legacy of Sir William Harpur, our founder in 1566, to benefit the inhabitants of the Borough of Bedford through the promotion of education; the relief of poverty, sickness, hardship or distress; and the provision of recreational facilities with a social welfare purpose.

Our Vision is of Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential.

Our Mission is to inspire and support people by ...

Providing Education

Promoting the highest quality, well-rounded education, through excellence in our own schools; promoting wider excellence in education through grant funding; supporting the Bedford Academy and other maintained schools; and maximising access to our schools for the economically disadvantaged.

Creating Opportunity

Providing individual support and developing access to learning programmes in all communities in Bedford, through grant funding and in partnership with other organisations.

Breaking down Barriers

Providing support via grant funds to organisations and individuals where needed, involving people in local initiatives, reducing barriers caused by disadvantage and increasing the community's access to recreation.

In all of these we aim to extend programmes and develop initiatives and activities which will be inspirational and set examples and models for successful social policy in other areas.

Our Values

<i>Our values – what we are like</i>	<i>Our behaviour – examples of what our values mean in practice</i>
We are innovative and forward looking, striving to be dynamic and an inspiration to others.	We will be alert to changes in need, be positive about change and moving forward to achieve our Vision and Mission. We will pilot innovative projects, and be passionate about communicating and celebrating successes so they can be taken further by others. We seek to infuse our staff, pupils and beneficiaries with a sense of what they can do to make a positive difference in Bedford and the wider world.
We are caring, fair and respectful.	We will treat staff, pupils and beneficiaries transparently and with fairness and respect. We will promote a positive working environment, with clear boundaries and decision making processes.
We are open and outward looking.	We value the contribution others can make, and we will take time to consult and listen to their views. We are responsive to requests for support, and welcome ideas and suggestions for developing what we do. We want beneficiaries to be involved in shaping what we do, and we will look at how to make this easier for them.
We act with integrity, and believe in quality and effectiveness.	We will be clear, honest and accountable for our work, through our Annual Report and Accounts. We will set high standards for ourselves in terms of service delivery. We will make the best use of the resources available to achieve our goals in a business-like manner.
We are inclusive	We promote diversity and equality of opportunity for our staff and beneficiaries alike in an open and fair way. We are consistent in our approach, and we will identify and attempt to overcome barriers to equality whenever they appear.
We are socially responsible	We will always consider the impact of our work on the community around us. We will try to make a positive and lasting difference to society. We will be aware of the wider environmental impact of how we work. We will promote positive environmental awareness in the services we deliver.

Why is this our Vision?

We believe that everyone has their own potential and that, if they can realise it, this will improve the quality of their lives and the lives of those around them. We recognise that there are many barriers that prevent people from achieving their full potential in life; in particular the lack of access to opportunities for learning and personal development whether caused by poverty, location, ethnicity, fear, adverse circumstances, prejudice, poor health, the immediate environment, and personal circumstances.

Our Vision helps us to articulate and communicate with the wider world that we believe we have a role to play in overcoming these barriers in order to improve the life chances for all, build a stronger community, and make Bedford a truly inspirational place to be.

Bedford – because this is our area of benefit, and this is our focus for making a positive impact.

Everyone – because we want to be inclusive – all individuals should be able to access and benefit from the work we do, where appropriate, and the whole community benefits if everyone is included.

Inspired - because we want to give people the confidence and the encouragement they need to take the steps they've always wanted to take.

Supported – because we want to help people to overcome barriers to success.

Realising their potential – because we want everyone to be able to identify and maximise their potential. If people are able to fulfil their potential they will improve their own lives and this will improve the community around them.

Pride in their community – because we want Bedford to be a 'special place' where people can fulfil their potential and thus help to create stronger communities, and strong communities will break down barriers for future generations to learn and develop.

We recognise that our goals are likely to overlap with what many others are striving to achieve, at national, county and local level. We don't think the goals of supporting individuals and communities are exclusive to any one organisation or type of organisation, and we are committed to using our resources to work in partnership with others wherever possible to achieve our mutual goals.

We have noted in particular, the emerging "Sustainable Communities Strategy" of Bedford Borough Council and where this overlaps with the Charity's Strategic Plan.

Strategic Plan

Vision	Mission	Objective	Activity	Outcome	Measure/target
<p>Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential</p>	<p>Providing Education</p>	<p>Provide the highest quality, well-rounded education for children in our schools</p>	<p>Run schools efficiently</p>	<p>Schools remain financially viable, maintaining sufficient levels of demand and able to meet them, with a positive reputation to attract and engage parents, pupils and staff.</p>	<p>Adjust capacity to provide education for 3,300 to 3,500 pupils aged 7 to 18 in 1 co-ed school and two single-sex schools with approximately equal number of places for boys and girls by the end of 2014.</p> <p>Schools will seek to generate an annual operating surplus of 10% (day schools) or 12% (boarding schools), as calculated in accordance with the national independent schools benchmarking survey, being the level identified to support future development.</p>
			<p>Bring Pilgrims into the Charity</p>	<p>Continuity of education from age 3 months to 18 provided</p>	<p>Pilgrims integrated fully into the Charity by the end of 2011.</p>
			<p>Maintain excellent academic standards in the Charity's schools</p>	<p>Pupils learn to a high standard in all their subject areas, and are encouraged to think, analyse and question as well as to absorb information Pupils achieve their educational potential, and this improves their life-chances (e.g. university, employment)</p>	<p>The average "Value Added" by each senior school is [<i>measure to be agreed and inserted before end of 2010 and reported on from end of 2011</i>]</p>
			<p>Maintain the wide variety of extra-curricular activity for pupils</p>	<p>Pupils develop areas of interest, achievement and experience, becoming well-rounded and with the opportunity to explore their talents</p>	

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Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential	Providing Education	Support the Bedford Academy and other maintained schools	Co-sponsor the Bedford Academy	Improved choice and standards of education available to children in the Bedford area	Successful opening of the Academy in 2010 in existing buildings and moving to new buildings in 2012. Improve attainment of educational and vocational standards to target levels set by Academy Trust by the end of 2014.
			Exchanging knowledge and best practice	Positive relationships with other schools, maximising the quality of education for all pupils	Achieving 50 active exchange relationships and joint activities including use of HT schools facilities by maintained schools by the end of 2014 (total in 2008/9 was 31)
			Sharing facilities	HT schools seen as an integral and accessible part of the local community.	
			Establishing joint activities with pupils from both sectors	Barriers broken down between schools and local community resulting in more collaborative activities becoming firmly established.	

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<p>Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential</p>	<p>Providing Education</p>	<p>Maximise access to HT schools for the economically disadvantaged</p>	<p>Increase bursaries to 5.5% of fees by 2014.</p> <p>Consider availability of bursaries from statutory school age</p>	<p>More children are able to overcome barriers of disadvantage, achieving their potential and improving their life chances by benefiting from education at HT schools.</p> <p>Continuity of bursary provision throughout the Charity's schools.</p>	<p>Increase in number of pupils assisted by the bursary programme overall by 60% (representing increase in bursary funding from 3.5% to 5.5%).</p> <p>Bursary programme extended to cover all children of statutory school age within the Charity's schools.</p>
			<p>More effective advertising of bursary opportunities to those who could benefit, particularly in disadvantaged areas.</p>	<p>Disadvantaged communities enjoy greater access the education offered by the Charity.</p>	

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<p>Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential</p>	<p>Providing Education</p>	<p>Promoting wider excellence in education</p>	<p>Making grants through the Excellence in Education theme to support projects which are innovative and/or show best practice in education</p> <p>Exchanging knowledge and best practice</p>	<p>Improved standards of education offered in the Beds area, by schools, colleges and through other education initiatives.</p> <p>Bedford education sector becomes more aware of and employs best practice and new thinking</p>	<p>Number of projects funded which have the potential to influence local or national policy or practice increased by 20% over 2009 levels by the end of 2014.</p>
	<p>Creating Opportunities</p>	<p>Increase access to education for all</p>	<p>Support programmes of education for people outside the compulsory education age bracket and those unable to cope in mainstream education.</p>	<p>People have greater educational opportunities, overcoming disadvantage and improving their life chances.</p>	<p>Grant recipients to report back on numbers of beneficiaries, their backgrounds and improvements achieved, supported by case studies where appropriate.</p>

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Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential	Creating Opportunities	Increase access to education for all	Provide individual support to access education (towards uniforms, tuition fees, university bursaries etc)	People have greater educational opportunities, overcoming disadvantage and improving their life chances.	Grant recipients to report back on numbers of beneficiaries, their backgrounds and improvements achieved, supported by case studies where appropriate.
		Support recreation, sport and creative activities with a community benefit	Grants to organisations	Wide access to activities which promote community engagement, mental and physical health, and enable people to explore their potential and talents.	Grant recipients to report back on numbers of beneficiaries, their backgrounds and improvements achieved, supported by case studies where appropriate.
			Increase community access to recreation, including facilities owned by the Charity.		
Support voluntary sector activities involving all members of the community	Make grants to voluntary sector organisations working to improve communities.	More involved communities, empowered to address their own problems and improve the quality of life and opportunity for all	Grant recipients to report back on numbers of beneficiaries, their backgrounds and improvements achieved, supported by case studies where appropriate.		

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Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential	Creating Opportunities	Support voluntary sector activities involving all members of the community	Make grants under the Voluntary Sector Infrastructure Support themed programme	Increased capacity of local voluntary sector to deliver quality, efficient services.	Objectives to include greater use of collaborative working and increased ability within the sector to develop a sustainable funding base. External evaluation may be used to measure success. Grant recipients to report back on numbers of beneficiaries, their backgrounds and improvements achieved, supported by case studies where appropriate.
			Encourage pupils and wider community to get involved in community activities	Pupils aware of and have positive experience of volunteering and civic engagement.	Each school to hold annual volunteering events and workshops with relevant speakers
				Volunteering/trusteeship promoted among staff and parents	

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Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential	Breaking down Barriers	Reducing barriers caused by disadvantage	<p>Make grants to voluntary organisations under the responsive programme and those themed programmes which specifically tackle the barriers caused by disadvantage, namely Homelessness, Excellence in Education and Child and Adolescent Mental Health.</p>	<p>Increased capacity for people to provide for their own needs, access available help and support and plan for the future.</p> <p>Reduced impact of mental and physical ill health and risk of homelessness, enabling opportunities to be taken up at school, work etc, improving life chances.</p>	<p>Measure number of participants, perception of effect on community via external evaluation and feedback from grant recipients and beneficiaries.</p>
			<p>Develop grants programmes in response to local need, paying particular attention to emerging and unmet needs.</p>	<p>Range of local services/initiatives for disadvantaged people increases to meet new needs</p>	<p>Number of new services developed to address local needs as informed by Young Foundation report and other sources of information.</p>

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<p>Bedford as a place where everyone has pride in their community and is inspired and supported in realising their potential</p>	<p>Breaking down Barriers</p>	<p>Reducing barriers caused by disadvantage</p>	<p>Support community activities that bring people together and enable them to make a positive difference</p>	<p>Increased confidence and engagement across social and cultural boundaries.</p>	<p>See under creating opportunities</p>
			<p>Provide support for individuals and programmes aimed at meeting needs of older people Investigate the most effective way of providing for current and potential almshouse residents</p>	<p>Less isolation and fear among the elderly. Older people valued in the community.</p>	<p>Measure the number of participants, type of activity, (particularly cross generational activity) and the perceptions of older people involved, using external evaluation</p>

Business support priorities

As well as the key objectives and activities flowing directly from the Vision and Mission, there will be a range of activities undertaken centrally in order to enable and facilitate the direct strategic objectives to be achieved. It is useful to highlight the areas of key priority, which will be fundamental to the achievement of the business aims over the period of the strategic plan.

Communications

A strong, centrally co-ordinated communications policy is essential to underpin delivery of many of the objectives in the plan. In particular, communicating externally about the aims and vision of the Charity, encouraging the take-up of bursaries and applications for grants, will be key to changing public perceptions about the Charity. Communication with the schools as an integral part of the Charity, while retaining their autonomy in many key areas, will be vital in developing a corporate and co-operative spirit, with a joint sense of direction. Both internally and externally, difficult decisions will need to be explained sensitively but robustly, in the light of the overall strategic aims of the Charity.

The clarity, understanding and effectiveness of each communication channel and the aggregate outcomes to be measured by a biennial communications survey.

Environmental impact policy

We are not a charity with environmental or conservation objects and must therefore ensure that either the costs of any environmental policies are incidental, or that they are justified as supporting our core objects, or that the reputational damage of not doing something justifies doing it.

Costs – some environmental activities/changes may make sound business sense and be cost-effective, e.g. using less energy, installing insulation, energy efficient lightbulbs and devices, reducing waste etc. It is our policy to adopt these practices as soon as practicable throughout the organisation.

Utilities consumption, waste reduction and recycling levels for each school and HTO improved against aggressive annual targets and appropriate benchmarks

Furthering our core objects – with key goals of education and a vision of enabling people to reach their potential, we cannot ignore the importance of issues relating to the global environmental impact of our lifestyles and examining ways in which we as individuals and organisations can be more responsible. It is our policy that issues relating to environmental impact form part of our educational agenda, as well as our grant making and community work.

Reputation – it is increasingly seen as best practice to adopt environmentally aware ways of operating – we would rightly be castigated if we did not examine and adopt such best practice. It is also our policy to play a leadership role in improving our environmental impact, where it is possible and not against our charitable objects to do so.

Grant making

If the grants programme is to have a demonstrable impact on Bedford over the next five years, it will need to work increasingly strategically to understand local communities and the initiatives which could improve their prospects. To do this we intend to invest in research, events and initiatives which help us to understand what works in education, relief, recreation and our own grant making, so that we can develop our priorities and work with beneficiaries to improve their results and learning.

Assessment of Impact be undertaken by the Grants committee and reported to trustees annually.

Human Resources

The Charity employs a large number of people with varied skills in a variety of roles. Every member of staff must be competent, capable and committed to delivering their objectives and be accountable for their actions. The trustees value the contribution made by all the Charity's employees and will ensure all employees are treated with fairness, dignity and respect. The trustees expect everyone to give of their best in delivering the Charity's range of services and will support them through the provision of constructive feedback and appropriate opportunities for all employees to learn and develop. The trustees will seek to ensure all employees feel valued and engaged in meaningful work, have appropriate and relevant involvement in decision making and feel that their views are respected as well as being appropriately rewarded for their contribution. These aims will continue to be delivered through the development of codes of practice, policies and frameworks that support proper performance management, reward, diversity and equality of opportunity, communication development and legal compliance. Important activities in this area will include the development of a comprehensive reward strategy and improved personnel management made possible by the implementation of new HR and payroll software.

The existing staff survey be improved in the light of experience and undertaken every two years and results shared with trustees and staff and an agreed improvement programme be conducted, keeping the BCCC informed.

HR indicators be established and included within the KPIs presented to trustees annually.

Investment policy

Our investment policy will continue to be important in order to maximise resources available especially for the increasingly important grant work. In current economic circumstances, the policy needs to be robust but flexible enough to enable a course to be steered through current turmoil and ensure that the charity is in a good position to benefit from the up-turn when it arrives. This area will be kept under continual review by the Endowment Committee.

The Endowment Committee to continue to keep the performance of the portfolio under review in the light of the economic circumstances and report annually on performance to the trustees.

Public benefit demonstration

This strategic plan should demonstrate that public benefit is at the heart of what we do and strive for, and is woven into every aspect, from the Vision through the values and into every activity. It should not therefore need to be stated separately, but recognition needs to be given to the obligation to meet the Public Benefit requirement brought into effect by the Charities Act 2006. This test has been recently applied by the Charity Commission in its first review of independent schools and other charities, and while we believe that the Charity and its schools would pass any reasonable requirement to deliver public benefit, we will keep a close eye on the findings of the Charity Commission and potentially a legal review of those findings. It is clear that we do in any event need to be able to identify clearly the public benefit we provide through our activities – the key areas to highlight from this plan are the increase in bursary support, the proposed sharing of soft skills with the maintained sector, the availability of facilities to maintained schools and community groups, grant activities and the increased involvement in the community by pupils, staff and parents. The public benefit that the Charity delivers will continue to form a major part of the Annual Report and Accounts

Trustees to be confident that the Charity's performance and effectiveness would, in their judgment, meet the public benefit requirement as that becomes clearer.

Resource rationalisation

It will continue to be a priority to ensure maximum efficiency in all the activities of the charity, ensuring that the best possible results are obtained from every resource deployed. This will mean further consolidation of back-office support wherever possible, and ensuring that all resources, including fixed assets (property) are used to best effect in achieving the strategic aims of the charity. In particular, the harmonisation of ICT to improve efficiency will be a significant area of activity, building upon the recent introduction of new fee billing and HR and payroll software.

The KPIs presented annually to trustees to include measures of efficiency and effectiveness for schools and HTO.