

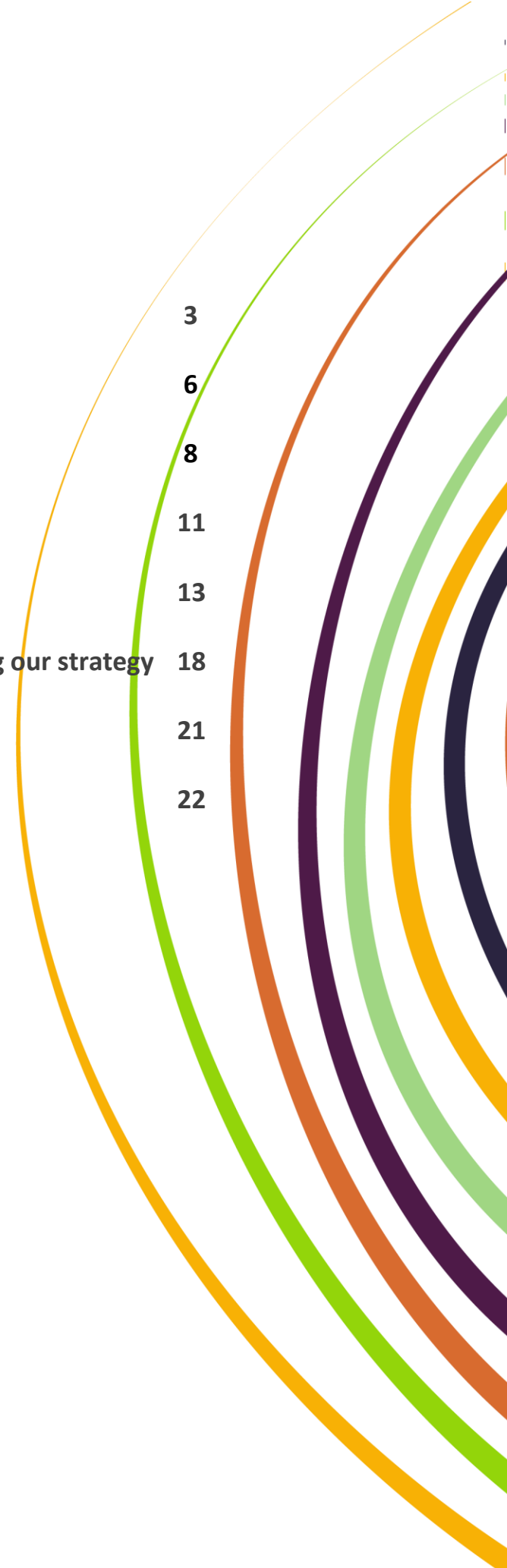
The logo features the word "BERNOCIA" in a yellow, sans-serif font at the top. Below it, the word "effect" is written in a large, bold, dark purple, lowercase sans-serif font. Underneath "effect", the phrase "Supporting Opportunity" is written in a smaller, dark purple, sans-serif font. The entire text is centered within a series of concentric, overlapping circles in various colors including purple, orange, green, and yellow.

**BERNOCIA**  
**effect**  
Supporting Opportunity

**Community Investment Strategy 2026-31**

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## Introduction

This document outlines how the Community Investment Strategy will support the core objective of supporting opportunity.

### Community Investment as part of our CSR Framework

The Corporate Social Responsibility (CSR) Framework connects our plans for community investment, housing services, equity, diversity and inclusion, environmental management, people and procurement. Together they set out how, across the many areas of our business, we support people, communities and the environment. Each has their own reporting and oversight structure, and these plans are captured in their respective individual strategies.

Therefore, this document is focused solely on that element of CSR which relates to community investment. It covers the support we offer, beyond the provision of quality homes, in helping people to thrive in their communities.

### Anchor Institution

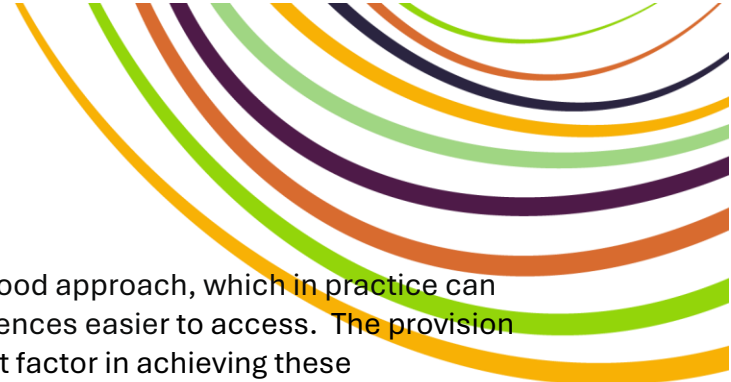
We are referred to as an anchor institution because we are rooted in communities and focused on their wellbeing. We build communities and our social impact effects the lives of people living there now and for generations in the future. Services are shaped by consulting with people living in neighbourhoods and engaging them in decision making processes. Our existing relationships, built on trust, means that we are well placed to overcome the barrier of initial engagement. This, along with our excellent relationship with community partners means that we can mobilise services quickly. Much of our community investment work is delivered alongside or as part of our housing activities. One of the aims of this strategy is to embed this further.

### Our operating context supports our aim:

#### Regulatory Focus

Our regulator's standards specify key actions outlining the important part that community investment plays in our day-to-day business.

The Neighbourhood and Community Standard states that registered providers must cooperate with relevant partners to promote social, environmental and economic wellbeing in the areas where they provide social housing. They should ensure tenants are engaged in service design and delivery.



Registered providers should adopt a neighbourhood approach, which in practice can mean making opportunities, services and experiences easier to access. The provision of community hubs is identified as one important factor in achieving these requirements.

Registered providers must work in partnership with appropriate local authority departments, the police and other relevant organisations to deter and tackle anti-social behaviour (ASB) and hate incidents in the neighbourhoods where they provide social housing. As anchor institutions we can build partnerships to enhance communities, attracting more investment, services and facilities.

The Tenancy Standard ensures registered providers must support tenants to maintain their tenancy or licence. New tenant satisfaction measures focus on customer engagement and require us to ensure that tenants are satisfied that “the landlord makes a positive contribution to neighbourhoods.” Tenants are also asked whether they are satisfied “with the landlord’s approach to handling anti-social behaviour.”

### **National and regional government policy**

The government aims to reduce the welfare bill and move people towards work, as set out in the ‘Get Britain Working’ white paper. We are well placed to support tenants towards employment and into good work.

The North East Combined Authority has responsibility for employment support and adult skills and is focused on innovative programmes to support those furthest from work into employment. The Mayoral pledge to tackle child poverty identifies good work as a route out of poverty as a central theme.

### **Procurement Act**

The Procurement Act 2023 introduces ‘public benefit’ to procurement with aims to achieve the best outcomes for the public and maximise social value. We work with our supply chain to direct social value to the neighbourhoods where we operate.

**The activities we set out in this strategy demonstrate that our focus on tenant and community wellbeing goes beyond our statutory and regulatory duty and helps us meet our core objective of supporting opportunity.**



## Why us?

Bernicia has a long-term commitment to addressing poverty, including our robust assessment to ensure that rents are affordable, building homes for social rent, accelerating energy efficiency work to reduce the cost of heating homes for tenants, and our commitment as an employer to good work pledges. The North East Combined Authority's Mayoral pledge to tackle child poverty identifies good work as a route out of poverty and aligns with Bernicia's aims. The Community Investment Strategy builds on our employability work, for example, by further enhancing our apprenticeship programme and further aligning our work to housing to create effective pathways for economically inactive tenants into good work.

As an anchor institution, we have a long-term commitment to people living in our houses, some of whom are the furthest away from work. Engaging people can be the first barrier in employability programmes and our trusted relationship with tenants has meant that we have been able to mobilise quickly. This benefits tenants and has led to us being a preferred partner with commissioners.

We have excellent relationships with a wide range of community partners and make best use of these by engaging relevant agencies to work with us in communities to achieve a wider range of better outcomes.

The Government's aim to reduce the welfare bill and get people into work, as set out in the 'Get Britain Working' white paper, will impact on tenants and we are well placed to provide support.

We have an excellent track record of reversing decline in 'at risk' neighbourhoods, linking physical improvements with wider social initiatives, such as those aimed at tackling anti-social behaviour, supporting life skills and employability. The Community Investment Strategy, aligned to the Housing and Communities Strategy, supports our wider regeneration ambitions as we proactively manage the neighbourhoods where we operate.

Our assessment of our operating context tells us that the voluntary and public sector is shrinking. Whilst we are mindful that we cannot and should not always step in to fill a gap, where there is a social and business benefit to tenants and Bernicia, we are often best placed to ensure that tenants are not negatively impacted.



## Where are we now: our approach

We have a strong track record of neighbourhood regeneration, combining physical improvements with wider social initiatives. The Bernicia Foundation was established as a separate entity in 2019 to support the aims of economic and social inclusion predominantly by providing grants to regional charities. Our corporate strategy 'Housing People, Helping People' 2022-26 built on Bernicia's strong social value history by core funding a Community Investment Strategy.

The primary objective of the Community Investment Strategy is to support economic inclusion with an aim to address poverty through good employment. Our employability programme, established under the previous Corporate Strategy, quickly developed a strong reputation for quality delivery and high performance, with local partners looking to us as an example of good practice. The key to this has been our ability to deliver a Bernicia-based, community focused agenda through a dedicated team. We are not reliant on chasing funding streams which often have restricted agendas. When we do apply for external funding, we ensure that this aligns with our priorities and furthers the delivery of our strategy.

A clear feature of our employability programmes is our one-to-one support offer. Our approach to apprenticeships and work placements has been enhanced with pastoral support provided by the employability team whilst also making best use of our internal resources across the Group to create opportunities for both the trainees and our business. We work alongside the Bernicia Foundation by linking employability programmes to grant funded projects delivered by local charities to maximise outcomes for participants.

This ability to work flexibly and cohesively across functions, to respond quickly to opportunities, and to draw together programmes to deliver coordinated outcomes, has been fundamental to the success of the current strategy and will form the basis of our strategy for 2026-31.

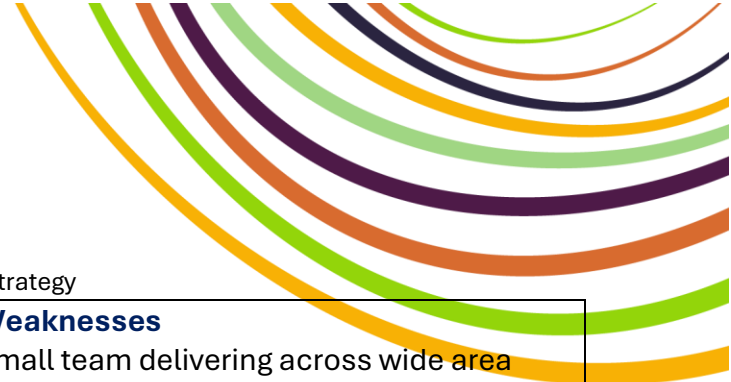


Table 1 SWOT analysis of CIS 2022-26 to inform 2026-31 strategy

<p><b>Strengths</b></p> <ul style="list-style-type: none"> <li>Existing track record of community activity</li> <li>Established partnerships &amp; reputation</li> <li>Clear objectives</li> <li>Established team not reliant on temporary funding or competing priorities</li> <li>Long term, consistent support for participants</li> </ul>	<p><b>Weaknesses</b></p> <ul style="list-style-type: none"> <li>Small team delivering across wide area</li> <li>Tenant engagement not fully established</li> <li>Region - low skills &amp; low employer base</li> <li>Travel to work challenges</li> <li>Access to services</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>Link employers &amp; agencies to workforce</li> <li>Develop specialisms to tackle key issues</li> <li>Extend tenant-focused employability</li> <li>Ability to use existing resources</li> <li>Enhance and leverage partnerships</li> <li>Procurement Act focus on social value</li> <li>Influence local agenda</li> <li>Align Foundation &amp; Employability activities</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>NEET growth</li> <li>Economic slowdown – fewer jobs</li> <li>Welfare Restrictions</li> <li>VCSE difficulties</li> <li>Cost pressures in other business areas</li> </ul>

The secondary CIS objective is to support social inclusion by helping people live well in their homes and communities. Many of these activities are delivered alongside our housing services. Most services are long-established, helping tenants live well in their homes through Intensive Housing Management support or aids and adaptations. Using our community hubs and organising events helps people take part in their community. Clean-ups and cohesion initiatives help foster good neighbourhoods. Continuing and further strengthening this approach will be at the heart of our new strategy’s approach to creating community opportunities.

The Bernicia Foundation has supported the delivery of both economic and social inclusion objectives. The Foundation operates independently, funding a wide range of VCSE projects across the region. Recently it has focused more on our economic inclusion priority and in areas where tenants are more likely to benefit. This has led to synergies with the activities of the Employability team, and we see this as a development opportunity for the new strategy.

# What does our insight tell us?

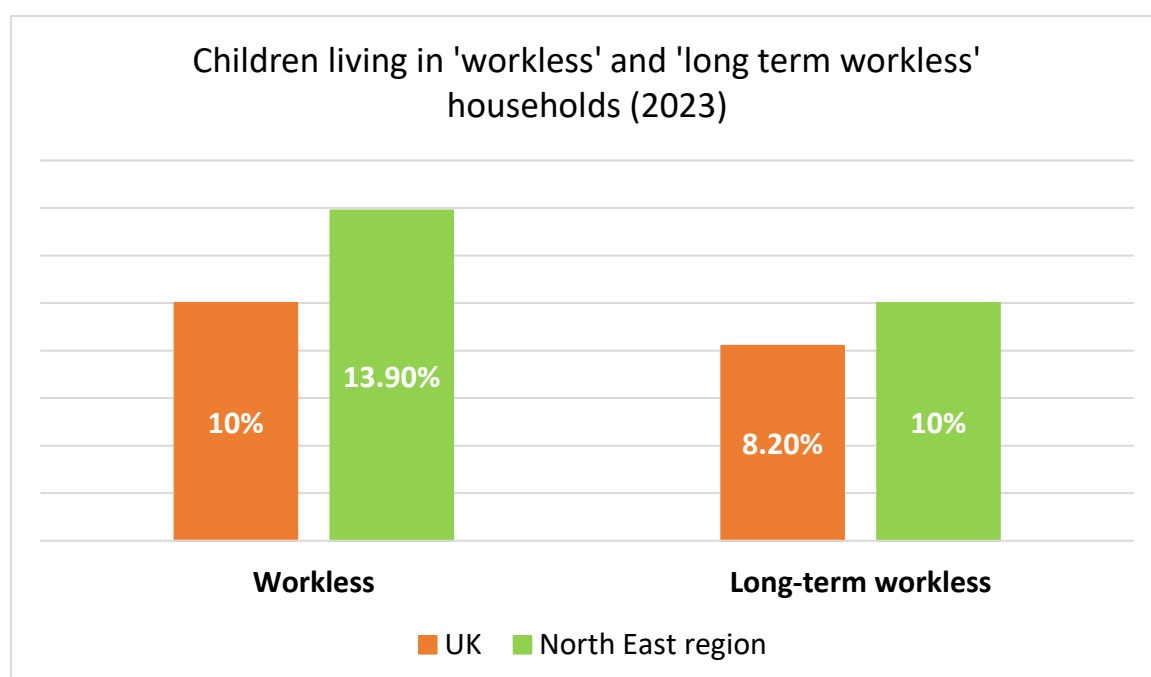
## Poverty and Poor Health

In comparison with owner occupiers or those living in private rented accommodation, government data from ONS, NOMIS and English Housing Survey amongst others, shows that social housing tenants are more likely to be living in poverty. 57% of social housing tenants are in receipt of housing support benefits, more than twice the number for private renters. Many more receive benefits to top up their in-work or out of work income. The ability to furnish a property and procure basics such as beds or white goods has become more difficult as price rises outstrip fixed incomes.

The data indicates that poverty/low income and health are linked. More social housing tenants have poor health and live with disabilities. This leads to independent living challenges, less participation, lower life satisfaction and high mortality rates.


## Skills and Aspiration

The North East Child Poverty Action Plan published in July 2025 states that children living in 'workless' and 'long-term workless' households are higher in the North East region:



Children living in long-term workless households 2023 (ONS, 2024)

Our experience of delivering aspirations and confidence building programmes in partnership with local schools is that early years intervention is key to tackling low



aspirations that are often linked to children in families of multi-generational unemployment.

### **Access to Services and Opportunities**

Poorer communities typically must travel further to access leisure and cultural services. Shopping can often be restricted to small local stores with less choice and higher prices, including fee paying ATMs. Transport, in the form of car use or capacity to afford fares, affects the ability to access services or take advantage of work opportunities. Driving is becoming a barrier with the costs of a car and insurance being restrictive. This narrows the available jobs, especially in places with weak public transport connections. The North East has a low business base, concentrated in key urban hubs. Travel to work options further restrict job availability. Poverty leads to fewer services and fewer opportunities, with less ability to travel to access them.

### **Digital World**

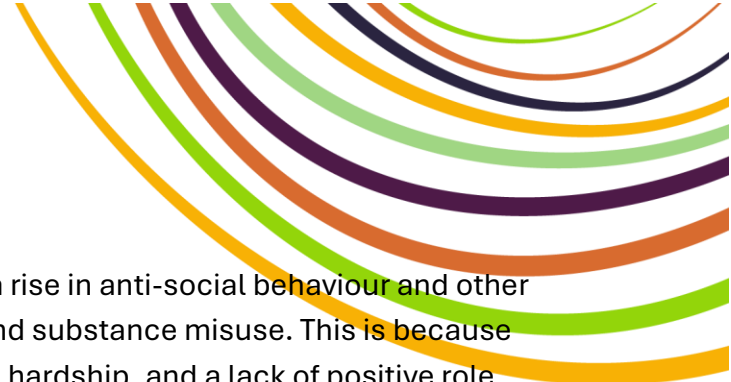
Digital access is increasingly vital but the ability to afford appropriate equipment or data services affects schooling, job search and flexible family-friendly working. Government and benefits services are heavily driven by online services and can be difficult to navigate on a small mobile device with limited data. In an era of increasingly fragmented or unreliable information sources, access to good quality advice alongside digital access hubs is important, especially on matters such as heating and ventilating homes, health, wellbeing, money management or debt.

### **Living Well**

People in poor health report increased levels of loneliness, however, loneliness itself can have a negative impact on physical and mental health. People who report that they feel part of their neighbourhood record higher levels of wellbeing. Loneliness and isolation are not the preserve of older people. An unemployed care leaver tenant with no friends or family in the area told us of their loneliness, feeling like they had little to do but stay at home. We hear similar stories from residents with ill health or neurodiversity. A feature of domestic abuse is to isolate people from access to financial services, friends and family. Young people are increasingly socially isolated, especially those with intersectional challenges described here.

### **Young People**

The persistent growth in the number of young people who are NEET (not in employment, education or training) is frequently highlighted as a concern in data sets. Central and local government agencies continue to announce plans to address this trend.



An increase in the number of NEETs is linked to a rise in anti-social behaviour and other negative outcomes, including criminal activity and substance misuse. This is because being NEET can lead to social isolation, financial hardship, and a lack of positive role models, increasing the likelihood of engaging in risky behaviours. Additionally, NEET status can have a detrimental impact on mental and physical health, further contributing to problematic behaviours. Young people who are currently NEET are potentially the long term unemployed of the future. This at a time when employers are indicating that they struggle to recruit skilled workers, most notably in construction trades. All of these factors could have long term effects on our business.

### **Support Services and Activities**

At a time of local authority spending restrictions, VCSE cost challenges and reductions in people volunteering, we see pressure on the availability of community activities such as youth clubs. The lack of access to services and activities, as described above, can play a major part in social isolation and loneliness. These services also play an important part in community cohesion and as diversionary activities. Meanwhile, access to green and blue spaces is proven to improve wellbeing, playing an important part in placemaking design.

### **Employment**

If poverty is at the heart of these issues, then the best way to alleviate it is to help people increase their income. That can be achieved by helping people into good employment.

### **Summary**

Poverty disproportionately affects social housing tenants and those who live in the neighbouring communities. It affects health, wellbeing, mobility and cost of living, as well as access to jobs, services and activities. It is a contributory factor in community cohesion pressures at a time when we are seeing a reduction in associated support services from both the public and VCSE sectors.

The Community Investment Strategy builds on learning and identified strengths from our current programme to help tenants and people living in our communities to move towards good employment and away from the effects of poverty.



# Where do we want to be?

In considering the data, insight and operating environment, we have identified the following areas of focus for our Community Investment Strategy:

## **Align to Regional Opportunities**

Devolution has seen the transfer of power and budgets on key relevant policy areas such as employment support and adult skills. The North East Combined Authority has identified clear areas of focus that align to our priorities - including work as a route out of poverty - linked to child poverty, and employment opportunities for social housing tenants, care leavers and armed forces.

We are active members of the North East Housing Partnership and Housing and Employability Network North East (HENNE) and are well positioned to support the Mayor to deliver these regional objectives.

## **Supporting Opportunity**

Poverty and poor health disproportionately affect social housing tenants. Our experience, alongside data and insight, indicate that the people who live in our homes and those who live in the surrounding communities, often need support to help them connect with opportunities. They may have barriers to taking up employment and have access to fewer community services. Our focus, therefore, will be on supporting employment opportunities and community opportunities.

## **Understanding Need**

By working closely with housing, we will develop a better understanding of customer and community need. This focus will mean developing pathways for tenants into employability programmes, for example, identifying need and opportunities at the point of service delivery including lettings teams referring new tenants to employability services. It will help us develop our offering to directly support our tenants.

We will use existing resources to address the needs of communities, including using Bernicia owned properties as additional community hubs such as Learning Hives, providing digital connectivity and skills development. Where we don't have the resources or expertise, we will support our suppliers or VCSE's to deliver on our behalf.

We will continue to work with agencies, steering groups and partners across a wide range of disciplines and geographies. This will continue to inform our approach. It will help us respond flexibly to opportunities as they arise.



## **Align Delivery with the Bernicia Foundation**

The Bernicia Foundation has enabled us to develop relationships with a network of third sector organisations within the region. Within the current strategy period we have developed employment programmes with some of these organisations, particularly where they have expertise in a specific client group or geographic area. We have also achieved efficiencies and improved outcomes by developing shared delivery models. We see the opportunity to further align the Bernicia Foundation and our direct delivery under this strategy.

## **Align to Housing**

Good work brings opportunities and benefits, confidence raising, supporting good mental health and positive social interactions. Getting people into good work, particularly tenants, strengthens communities, making them more cohesive and resilient. The activity in this strategy supports Bernicia's work to ensure that neighbourhoods are sustainable in the long term, increases resilience in the cost-of-living crisis, helps to control rent arrears, can reduce crime and ASB, improves the quality of people's lives and helps to control costs to the business.

We will therefore focus employability delivery in areas where our tenants mostly live. This will be mainly North and South East Northumberland, as well as Central Durham and Sunderland. It is natural that key parts of Northumberland, with over 50% of our stock, will be the primary area of activity. In South East Northumberland we have an established presence, are the major landlord, have a concentration of tenants and infrastructure such as Learning Hives, head office services and funding opportunities. Berwick too has a concentration of homes although the education and job markets are more challenging, and the VCSE sector is not particularly well established. We will continue to pursue options here, exploring potential solutions to this challenging environment with the further education and trade sectors.

Our experience of delivering in other locations where we do not have the same level of representation, has often been that engagement is more difficult. We will, however, take advantage of opportunities as they arise, for example to work alongside development and maintenance projects or with major procurement partners. We will also work with delivery partners such as HENNE on funded projects on a case-by-case basis, delivering to target groups and in places as defined by the funding.



## How will we get there?

Our delivery plan builds on the learning and strengths identified within the current strategy period and ensures that we can be agile and respond to opportunities that we actively pursue, such as scaling up to deliver externally funded projects including NECA trailblazers and pilots.

### Employment Opportunities

The most appropriate way to alleviate poverty and the associated health issues, is to help people gain good employment. This will continue to be our primary Community Investment Strategy focus. To do this, we will directly help people to overcome barriers to work, especially tenants and young people living in our communities. We will also create the right conditions in their local environment to facilitate change.

#### **Specifically, we will:**

- Funded Projects - Work with partners and local agencies to support regional priorities by accessing and delivering externally funded programmes which enhance our service.
- We will explore innovation, including working across sectors such as colleges and VCSEs, particularly the Northern Learning Trust through the Learning Hives model.
- Develop effective pathways for tenants into employability programmes.

### Aspirations & confidence

There are three key aspects to gaining good employment; aspiration, skills and jobs. Often, they are interlinked, being accessed together as part of a wider programme, or in progression e.g. pupils from school programmes who then access a pre-apprenticeship skills programme, before taking up apprenticeships followed by full time employment. Our strategy, therefore, provides services across all three aspects. Our experience tells us that aspirations work is much more effective when started at an early age.

#### **Specifically, we will:**

- Work with key schools close to tenants and with all schools feeding into the Housing and Innovation Construction Skills Academy (HICSA).
- Build confidence through world of work events, classroom talks and insight days.
- Provide experience through mock interviews and CV skills; visits; tours; placements; internships with Bernicia and suppliers, and pre-apprenticeship events.



## Young People

We have already commented on the rising NEET trend and the potential effect on our communities of worklessness and long-term unemployment. Our work with the education sector, alongside our apprenticeship programme, potential funding opportunities and care leavers covenant commitment, all provide a coordinated and linked service with next steps opportunities for the young people we work with. We have also previously commissioned experienced external contractors to deliver bespoke outreach work, engaging young people directly in out of hours community settings. They provide a range of advice, signposting, support services and places to socialise, in ways we do not have the resources to deliver ourselves. We will continue this theme within this strategy, building on our experience to date.

### **Specifically, we will:**


- Identify contractors with outreach capability to deliver programmes to bring young NEET people closer to the job market.
- Develop progression pathways for young people by further aligning all the elements within our Community Investment Strategy.
- Use insight and data from our housing colleagues and ASB Partnerships to identify hotspots or young people at risk of offending and provide early intervention support.

## HICSA – the Bernicia Academy

To further enhance our aim of supporting young people, a particular focus of this strategy will be to develop a close relationship with the Housing Innovation and Construction Skills Academy being built on the Northumberland College campus in Ashington. As the lead construction partner, Bernicia will have a strong input in the curriculum, its delivery and the types of services offered as well as partnering to deliver classroom sessions. We see opportunities for managing our talent pipeline and in developing employability relationships across the wider business community. It is likely to have an impact upon our schools programme and our ability to attract and train apprentices through a Bernicia Academy pathway. It will also support adults into construction and green technology and we hope to develop related programmes for our target groups such as armed forces veterans.

### **Specifically, we will:**

- Be the lead construction partner, sponsoring a pre-apprenticeship programme, the ‘Bernicia Academy’ with guaranteed interviews and a clear pathway into our trades talent pipeline.

- 
- Inform curriculum development and contribute to classroom delivery providing opportunities for our experienced tradespeople to move into skills sharing and mentoring.
  - Explore delivery models with Northumberland College for a range of participants such as retrofit skills for armed forces veterans.

## Apprentices and trainees

We have seen huge success with our apprenticeship programme over the years. Our retention rates are extremely high in comparison with the national average and our current programme represents circa 5% of our workforce. We see our apprenticeship programme as a key pathway to employing tenants. Our programme is embedded across the Group, offering young people routes into careers in a wide variety of roles including business support services such as finance, HRD and ICT; housing; trades, and roles within our commercial companies.

### **Specifically, we will:**


- Explore new delivery options, particularly linked to HICSA.
- Use data from the Repairs 2031 project to further align apprenticeships with emerging trades skills requirements.
- Deliver and evaluate a tenant priority offer including guaranteed interviews and additional pre-apprenticeship support offer.

## Commitments

We aim to deliver on our existing commitments. We have committed to covenants supporting two key groups that have barriers to work. We have also committed to working with partners such as HENNE and to maximising social value from procurement. During the strategy we will take advantage of funding and partnership offers to deliver additional projects if appropriate.

### **Specifically, we will:**

- Barriers to Work - We will deliver our commitments under the care leavers covenant and the armed forces covenant by providing bespoke employability programmes for these target groups. We'll seek to engage with other covenant signatory companies to maximise opportunities.
- We will continue to embed our care leaver pathway and share learning with other organisations.
- Social Value - Work with contractors to deliver social value commitments given under Procurement Act legislation.



Social inclusion will remain the secondary objective of our Community Investment Strategy. We want people to be able to live well in their homes and their communities and be able to participate in services and activities.

## Support social wellbeing

The opportunities we provide here are very much delivered alongside and part of our housing services. They are examples of understanding need and collaboration.

Remote care services provide tenants with the confidence to live independently and their families with the reassurance that there is support on hand if needed. We will keep under review technology developments which might enhance this service. We will continue to back this up with regular care calls to our most vulnerable clients, which can also help with feelings of isolation.


Aids and adaptations will help people move safely around their homes and give them the confidence to undertake daily tasks for themselves.

For those most in need, especially those at risk of losing their tenancy, our intensive support can help with managing finances, accessing benefits and being directed to the specialist support they need. Our Ashkirk homeless service helps families at times of crisis and provides them with support of a period of months to help them work towards having their own settled home.

Our safer communities team will continue to work with residents and partner agencies, such as police and local authorities, to address antisocial behaviour and hate crime. This will include awareness campaigns and working with VCSEs to support diversionary engagement activities.

We will continue to use our resources to help our communities. Retail units are let on supportive terms to community organisations providing local services. Community hubs provide spaces for groups to meet (e.g. mother and baby) and host events such as Halloween parties for young children. We also use them for skills training and employability support, with many people accessing a hub socially and then progressing through courses such as cookery or basic maths. The Bread and Butter shop at Pelaw View Centre provides low-cost fresh food for local people.

We will also keep in mind opportunities to co-locate with other related services such as social prescribing services or to use drop-in sessions at VCSE communal centres.



Organising events or joining with partners to deliver joint activities will continue to be a feature. Examples include neighbourhood tidy sessions, litter picks, skip days, awareness campaigns (e.g. about health or loan sharks). We'll continue to use our estate services to create pleasant and safe places to enjoy.

Our community grant is an opportunity to provide excursions or gatherings for residents, especially older people who need more support to travel.

Our partnership with contractors means we will work with them to provide a range of community facilities through their procurement social value commitments.

**Specifically, we will:**

- Extend social activities so that more tenants can participate in their neighbourhood and community.
- Review the outcomes from 'Back to School' events being piloted this year by the employability team in collaboration with colleagues, partner agencies and charities at The Hirst and Pelaw View.
- Use insight and data from the business to inform the location and focus of community support activities and events.



## Implementing, monitoring, and reviewing our strategy

Many of the actions required to achieve our objectives will be delivered on an annual basis. We will set targets, which, combined, will form an overall target for the strategy period. This is consistent with good practice in measuring social value outcomes. Wellbeing improvement benefits, and their corresponding proxy values, can often only meaningfully be measured over a maximum 12-month period.


The types of measures that we use will include:

Objective	Measure
Aspirations	<ul style="list-style-type: none"><li>No. of people participating</li><li>No. who report increase in confidence</li></ul>
Employment - Skills	<ul style="list-style-type: none"><li>No. of people receiving job related skills training</li><li>No. achieving qualifications</li></ul>
Employment - Jobs	<ul style="list-style-type: none"><li>No. of economically inactive or unemployed people who get jobs, or those who move into more predictable employment</li></ul>
Support social wellbeing	<ul style="list-style-type: none"><li>No. of people participating</li><li>Participants' views on their local area</li><li>No. of people experiencing a reduction in anxiety or improved confidence</li></ul>

### Measuring impact

During the 2022-26 strategy period, we have measured impact using established social value tools which align to the United Nations 17 Sustainable Development Goals. They define outcomes experienced by support recipients. Sometimes we can ascribe proxy monetary values to these outcomes, to give a financial indication of the impact.

These social value outcomes recognise a range of benefits. The recipient can experience wellbeing and health benefits, whilst the exchequer often benefits from a reduction in public expenditure / increase in income. For example, people who move from unemployment into work are proven to experience an increase in confidence and self-esteem. Their aspiration changes. They can start planning their finances and typically become healthier. The state spends less on health services, income benefits, policing and public services. Statisticians have been able to place a proxy value on



this, which is over and above any increase in income the newly employed person might achieve.

We can measure a range of such outcomes, including the effect of having qualifications, reductions in loneliness, feeling part of a neighbourhood and taking part in social activities. We will apply these measures, where practical, to the activities we undertake and demonstrate their impact.

There is an acknowledged industry challenge in measuring social value outcomes. There is not one way of measuring, and some proxy values differ significantly depending on which framework is used. We have had trouble in identifying recognised outcomes for all aspects of our work. The established method of overcoming this is to combine quantitative measures with qualitative case studies and user stories. We have used this method previously in our annual reporting and will continue to do so where appropriate in the new strategy period.

In addition, we have outlined earlier some of the practical ways community investment benefits our business. They include the effect of our apprenticeship programme, which has been an important tool in helping us recruit, train and retain skilled colleagues, especially where there are skill shortages such as in trade roles.

The Procurement Act has led to renewed activity across sectors grappling with methodology to measure social value. We are currently engaged in work being led by the North East Chamber of Commerce to develop a regional framework and will continue to participate where we see a value to Bernicia.

## **Communicating and reporting progress**

Currently, Community investment plans and outcomes are reported in different ways. Community investment plans for the coming year, excluding Bernicia Foundation activities, are reported annually to the RRA committee. Ongoing Bernicia Foundation activities are reported twice yearly to the Bernicia Foundation Board. The Bernicia Foundation Board receives an annual report of progress, which is also received by the RRA Committee along with a report on Community Investment Strategy outcomes.

The new Procurement Act requires that social value outcomes should be delivered on certain tendered contracts. These have the potential to support both mainstream Community Investment activities and Bernicia Foundation, causing potential duplication in future reporting.

Reporting arrangements will be considered as set out below.



## **Efficiency, value for money and strengthening oversight**

The Community Investment Strategy sets the criteria on which Bernicia will continue to deliver, and deliver more, added value work. The strategy commitment represents over £3 million additional funding over the five-year strategy period.

Where previously community investment activity was seen as an ‘add on’ to operational delivery, increasingly, this activity is becoming a core offer of social housing providers as anchor institutions.

We are working with the Board to consider the governance, oversight, support, monitoring and reporting arrangements in place to ensure an efficient and effective structure underpins this increasingly important service to tenants and wider communities.



## Conclusion

The Community Investment Strategy is a core commitment of Bernicia's Corporate Strategy 2026-31. It builds on our long-term aim to tackle poverty and is central in our objective to supporting opportunity.

# Appendices





## Appendix 1: Stakeholder analysis – insight sources

Insight analysis is derived from data provided by central government as well as local authority and combined authority partners. Similar data comes from regional and national business groups such as NE Chamber of Commerce and Communities that Work.

Northern Housing Consortium has produced a report outlining the challenges of housing in the North, which supports information from the English Social Housing Survey and National Housing Federation.

We participate in multi-agency steering groups (comprising DWP, VCSE, FSB, skills agencies, colleges, health services, police, local authorities etc) where this data is debated. Strategies and actions are discussed to address poverty, jobs, skills, health and community cohesion. We are members of community wealth building and placemaking groups which share ideas and experiences.

Our membership of the North East Housing Partnership enables us to share experiences with other local registered providers. We have delivered employability programmes in conjunction with community groups and specialist organisations (dealing with low skills, homelessness, addiction, prior convictions, disability and ex-armed forces).


Bernicia Foundation awards grants to help VCSE's deliver relevant services. From all this we gather frontline experiences of the issues faced and the barriers to improvement. The Community Foundation Tyne & Wear and Northumberland is an advisor to the Bernicia Foundation and gives detailed insights into the performance of the VCSE sector and the challenges they and their service users face.

Our experience, alongside the feedback from partners and the evidence of multiple data sources, fits with the government's social value model. This seeks to improve local areas, focusing on 5 missions based on good jobs, clean energy, safer streets, breaking down barriers to opportunity and healthier living.

### **Insight from tenants, colleagues and collaboration**

Information is fed back from across the business throughout the year, and the CSR team uses it to inform its annual Board report.

Intensive Housing Management teams work with at risk tenancies often caused by low income, poverty or ill health. They help tenants access benefits and manage their finances, as well as signposting to specialist support agencies for health and wellbeing advice. Neighbourhood teams provide feedback on initiatives to support community cohesion such as ASB activities and events held at our community hubs. Housing



services provide feedback on the demand for our hardship grants and housing adaptations. Estates services are involved in community clean ups and furniture recycling.

The Community Investment Grant team link with VCSE community organisations in key locations. The Bernicia Foundation funds VCSE projects supporting our current priorities of economic and social inclusion. It receives detailed applications and monitoring feedback which outline the issues affecting the people they work with.

The Employability team work closely with organisations helping those with barriers to access skills and work. They work in schools and with colleges to encourage aspiration and improve skills. They also collaborate with various departments to provide work placements and skills for those with barriers to work. This provides valuable direct feedback from the people receiving support. The team is also developing a specialism in working with care leavers, working with local authority partners and focusing on quality interventions with a depth of understanding of needs.

Procurement colleagues are working closely with a cross-department committee to meet the new social value obligations set out in the Procurement Act. The committee considers social value opportunities for suppliers, reflecting needs identified from their own service areas.


We collate feedback and monitoring insight from our tenants and people in surrounding communities who use our employability services.

## **Stakeholder Influence & engagement**

### **How will we take tenants, colleagues and other stakeholders with us?**

Direct delivery with tenants and communities, including feedback on projects, has helped shape existing plans and will help remove barriers / inform future development. Engagement with participants, partners and VCSE's that we support will help us understand need and the effectiveness of delivery throughout the strategy period.

We will continue to promote opportunities and good news stories using social and mainstream media. Case studies, gathered from across the business and from the organisations we support, will help bring understanding of the work we do. They will engage people with similar experiences and encourage them to participate. VCSE's have been keen to take advantage of our ability to promote their services to a wider audience.



Word of mouth referrals have been a strong way of encouraging people to take up our employability services. Encouraging people to attend activities with friends has been a proven way of overcoming personal barriers that many people face. Community events have been a way of encouraging people to use our centres and then access other services while they are there. Cookery classes have been used as a first step to learning basic maths or as a pathway into employment. Taster sessions and work trials, coupled with patient pastoral support, have encouraged those furthest from the jobs market, or with the greatest support needs, towards the reality of regular work or study.

Clarity about our requirements and process will produce better involvement and outcomes from our social value suppliers and more engagement from our colleagues who manage their contracts. Alignment with our employment priorities will ensure more cohesive delivery and relevant outcomes.



## Appendix 2: Resources – cost and people


Since the launch of our employability programme during the last strategy, the services it offers have continued to evolve. Its performance has grown steadily and contributed over £9.5m of social value in 2024/5 alone. The existence of dedicated Bernicia funding provides stability, coordination, independence, flexibility and a level of performance that would not have been matched if reliant upon regularly seeking short term external funding. It has been a platform on which we have been able to build a more structured approach to Community Investment.

Initially, external organisations with relevant expertise were awarded contracts to deliver employability projects for people with a range of barriers to work. This freed up time and resource for the small Employability Team to become established and to set up its own projects which have gradually grown.

The volume of external programmes has now reduced in favour of more self-managed internal delivery. The range of barriers supported has also narrowed as the external contracts have aligned with the internal projects. Examples include courses for economically inactive (EI) residents which supported internal delivery of New Start EI placements, funded by UKSPF. Our growing level of expertise, and our ability to combine programmes, has seen agencies and organisations approach us to collaborate on several new opportunities. This is especially relevant given the funding opportunities through NECA and the requirements of the new Procurement Act, where we will have the chance to work alongside or on behalf of our contractors.

During this period, we have been successful in attracting grant funding to support 6 programmes. All programmes had extremely short application deadlines. They posed significant resourcing challenges given both their short notice start dates, and short delivery duration. It affected programme design as we developed the bids to match the anticipated delivery resource. Short notice, short term recruitment makes it difficult to attract the right people, especially as there is a need to “hit the ground running”. Our experience, and the practice of our HENNE partners, is that, to access future funding, it is important to have a pool of experienced resource available to be redeployed at short notice. We will continue to use a proportion of the Community Investment budget on direct employment to ensure a level of consistent delivery that can be scaled up as appropriate with external funding.

Our apprenticeship programme has grown, not just in volume but in quality of delivery. The volume and quality of applications increased significantly following improved planning and a coordinated approach to school engagement. Pre-apprenticeship workshops and training now support this. We have improved recruitment processes, established training for mentors and implemented a structured programme of pastoral



care to support progression. We now have consistently more apprentices in training across our business and have expectations for further growth to meet our business recruitment needs. Most apprentices qualify and take up establishment roles in Bernicia and the growth in trainees is reflected in an increased number of colleagues recruited via this route. Being a primary partner in HICSA will lead to increased involvement with trainees, placements and apprenticeships, working with school age learners and adults. We need to increase resource to manage this extra apprentice volume and new HICSA commitment.

This approach to traineeships and pastoral care informed how we set up and deliver our new Care Leavers programme. We have expanded to support a caseload of 12 care leavers with aims to help more. However, we recognise that some will face several challenges which affect both their progress and the level or type of support they need. Intensive, persistent support, often over a lengthy duration, can be time consuming. But the impact is significant. Care leavers have been beneficiaries of the grant funding we have been awarded, gaining placements in our business. This has also helped our business access additional resource without an impact on their establishment budgets.

The growth in internal delivery rather than contracted out external delivery means additional resource requirement within the team. This is not additional cost as it is contained within the proposed CSR budget. It is offset with a reduced level of externally delivered contracts. In the case of apprentices, this is essential given the internal nature of the work. It incorporates additional delivery staff whose duties can be switched to focus on funded programmes at short notice. This will help us attract extra funding to the Employability programme and deliver more of the outcomes set out in our strategy.

Community opportunities will continue to be delivered alongside and as part of our housing offering, with costs absorbed as part of the delivery.



## Appendix 3: Risk Assessment

- **What is the risk assessment for this activity?**
- Employment Opportunities - Low Risk. Flexible, mostly short-term delivery of advice and support, capable of change. Client chooses to engage and can disengage at any time. Grant awards subject to established assessment and monitoring.
- Community Opportunity – Low Risk. Short term, mostly low-cost individual interventions, advice and signposting. Client chooses to engage and can disengage at any time.
- **How will we remove, mitigate or transfer risk?**
- Employment Opportunities
  - Annual targets and plans, regularly reviewed and reported on.
  - Training for staff. Appropriate policies and procedures in place.
  - Business placements vetted and monitored.
  - External delivery partners and grant recipients recruited for expertise and vetted. In-delivery reporting and visits, post-delivery monitoring of performance
  - Introduce CRM system to track service users in GDPR, moving away from spreadsheets.
  - Focus on anonymised performance data where possible. Data sharing agreements in place where required.
- Community Delivery
  - We have long experience of operating many services, such as hubs and installation of adaptations delivered under repairs processes.
  - Use VCSE expertise to deliver some services and manage some hubs, with performance metrics and monitoring procedures
  - Activities and events risk assessments
  - Procurement social value priorities and commitments assessed by working group. Tender commitments assessed and monitored in line with guidance. Commitments written into contracts, often as KPI's. Procedure for nominating and funding projects in line with commitments. Internal reporting programme and public reporting where required. Usually externally delivered on contractor's own account.