

Annual Report
2008-2009



Somerset
Community Foundation
Local giving for local needs

Local Giving for Local Needs

Somerset Community Foundation targets grants that make a genuine difference to the lives of local people. Using our local knowledge and experience we are able to help donors make a difference in their community by supporting smaller organisations that they could not otherwise reach. By building an endowment fund we are also creating an asset that will provide long-term support for our communities, meeting current and future needs.

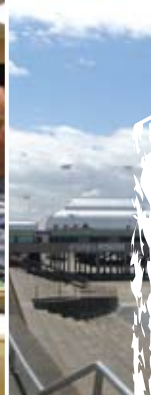
This annual report summarises our major achievements between April 2008 and March 2009. Highlights include:

- 170 grants awarded
- Over £280,000 distributed to good causes
- Successfully completed the 2008/09 Grassroots Grants Match Challenge
- Established 12 new endowment funds
- Completed the 1st Edition of our Social Needs Assessment (available on-line)

We have included a small number of case studies to represent the range of grants we made during 2008/09.

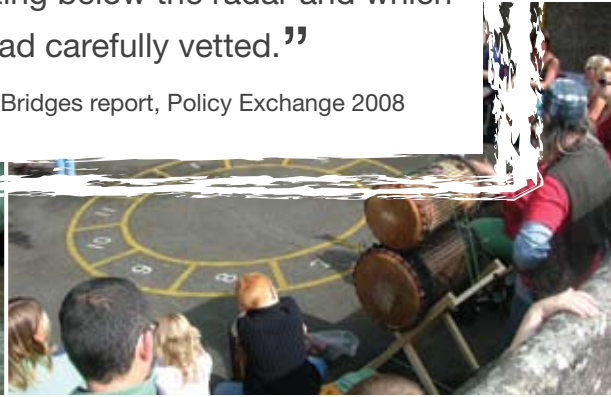
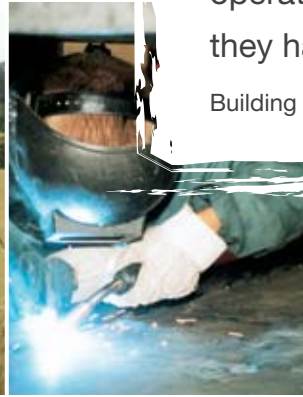
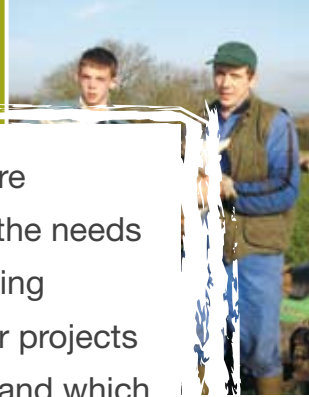


Looking forward, our principal goal is to continue building our Endowment Fund, complete the Grassroots Grants Match Challenge and promote our legacy campaign to supporters and through professional advisors (see page 19). Our move to Yeoman House at the Royal Bath and West Showground will also provide us with a permanent, more visible presence in the county (see back cover flap).



“Community Foundations are invaluable for researching the needs of local areas and introducing donors to small charities or projects operating below the radar and which they had carefully vetted.”

Building Bridges report, Policy Exchange 2008



Angela Yeoman - Chairman 2002-2009

I am pleased to report that the Somerset Community Foundation has now moved offices to a building within the Royal Bath and West Showground, giving the staff more room and the ability to hold meetings on site. With ample parking facilities, the Foundation is now more accessible to everyone and the team would be delighted to see you!

With our Grassroots Grant Match Challenge we have been able to accelerate the growth of our endowment fund and I am very grateful to so many people who have given us the chance to double their contribution by way of this government grant.

The endowment fund is growing into an important asset for our local communities, a means to provide independent long-term support to local organisations and charities tackling issues of disadvantage throughout the towns and villages in our County.

We are well on our way towards our goal for this year's Match Challenge of £204,000 but we still need to push forward to complete the challenge next year. Your valued support and help with this is paramount to our success at achieving this.

You can see by the report how busy we have been and because of your generosity we have been able to give financial support to 139 local voluntary groups and with careful planning and the continued support from yourselves we can make sure that these grants are available not just for today, but for generations to come. During the past year we passed the £2million milestone for total funds distributed across the county.

This year I stand down as Chairman, and in closing I would like to thank my fellow trustees and the Foundation's staff for all of their hard work and support that they have given me and the Foundation for the last 7 years. At this time I would like to introduce you to the new Chairman, Peter Wyman, who I am sure will take you all forward into the next era with the same enthusiasm that I have.

Angela Yeoman OBE DL
September 2009



Peter Wyman - Our New Chairman

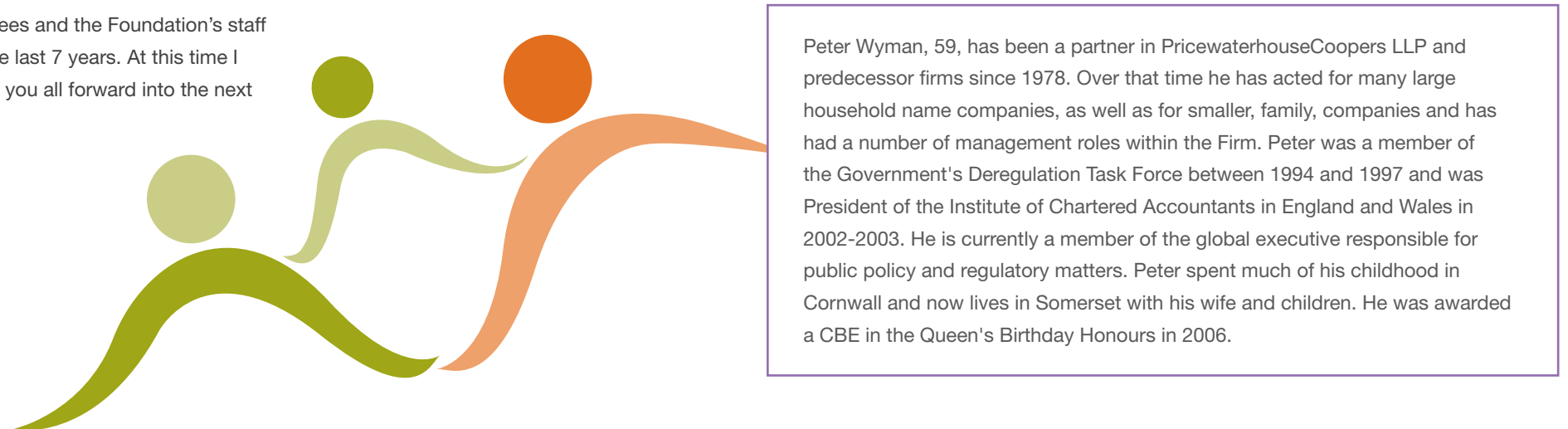
Economists are divided on the speed and extent of the post-recession recovery but few doubt the next several years are going to be as challenging as any since the early 1980s, bringing high levels of unemployment, reduced private sector pensions, higher taxation and lower public spending.

The Somerset Community Foundation's vision is to promote vibrant, inclusive communities in Somerset through developing a culture of local giving and enabling voluntary groups to address disadvantage and isolation.

Communities are often at their best when they are given the opportunity to address their most pressing needs. With the support of our donors and volunteers, we will be able to provide a necessary and strong response to the grave challenges facing many of the County's most vulnerable citizens in the months and years ahead.

We all owe Angela Yeoman an enormous debt of gratitude. She, more than anyone, has successfully brought SCF from birth to where it is today. Working with the Trustees, staff and many supporters, I see my role as her successor to be, in the short term, to help SCF respond effectively to the immediate challenges and, in the longer term, to build on what has been achieved to create an endowment for the benefit of future generations of people of Somerset.

Peter Wyman CBE
September 2009

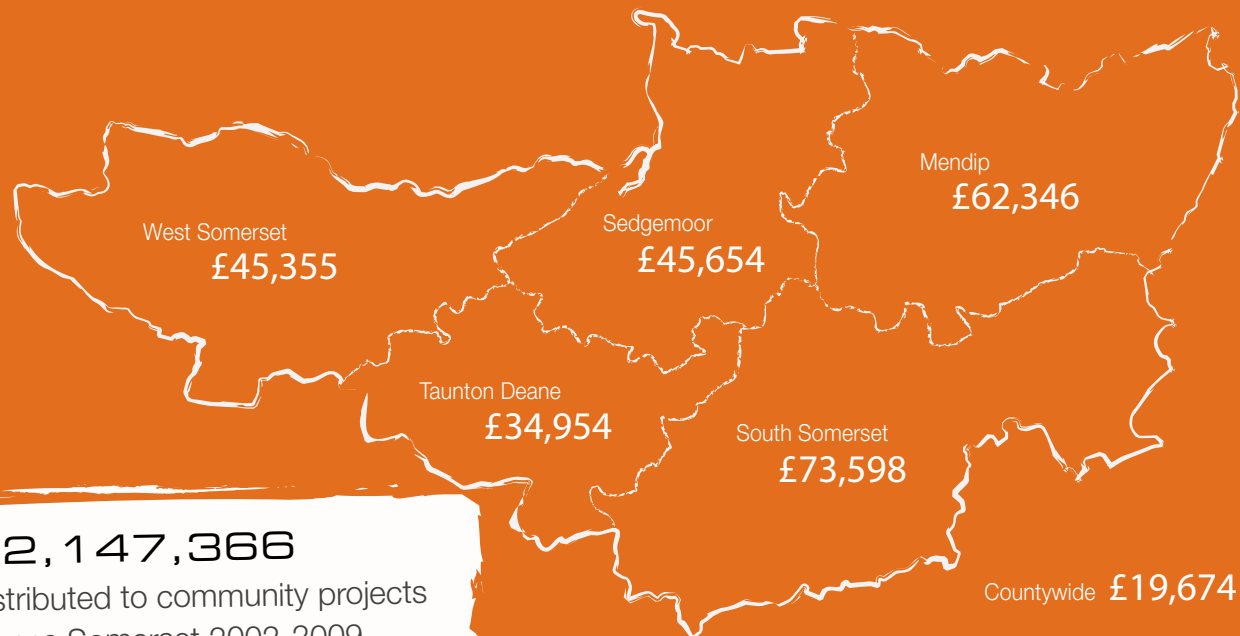


Grant-making 2008-09

During 2008/09 the Foundation made more grants than ever before, and to a far wider range of organisations. In doing so we have also reached many more and generally smaller organisations than in previous years, reflecting the breadth of the Grassroots Grants programme, and the growing number of local and non-statutory donors using the Foundation to target their support locally. Once again we have seen how important local community groups, often run entirely by volunteers, are in reaching those who are most in need of a helping hand. Carefully targeted small grants can and do make a big difference.

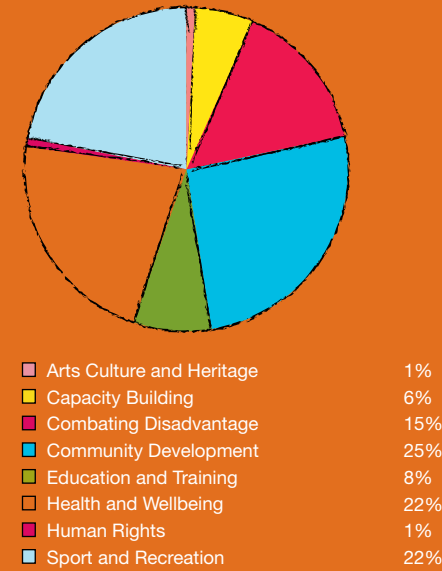
Every application is carefully considered and either put to our panel of volunteers or discussed with fund-holders who have an interest in a particular area or project. Although we sadly have to turn down some applications, we try to offer support and advice to improve their chances in the future whenever we can. Over the next few pages we have highlighted a small number of projects and people reflecting the diversity of community initiatives supported by us, making a real difference day in day out throughout Somerset.

We are also on the lookout for volunteers to help us, in particular visiting projects as part of our monitoring and evaluation process or to help us in the office to process applications. Please contact Jocelyn Blacker for more information.

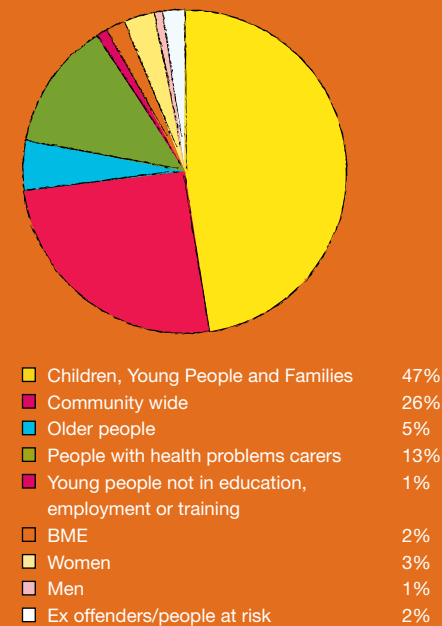


£2,147,366
distributed to community projects
across Somerset 2002-2009

Number of Grants



Beneficiary Types



Somerset Today: A Social Needs Assessment

As the Foundation grows, we are able to support a broader range of community-based projects. This brings about new challenges in terms of targeting funds where they will have greatest impact.

To help us we commissioned our first Social Needs Assessment, a broad review of existing evidence covering a wide range of issues. This was made possible with a grant from Somerset County Council and a private donation.

A wide range of issues are covered, from the implications of a rapidly ageing population to the relatively high levels of poor literacy and numeracy within the adult population; from high levels of fear of crime (but not actual levels of crime) to the challenges young people in rural areas face. The ways in which local voluntary organisations can make a difference are highlighted at the end of each chapter.

The full report is helping us target our funds, advise donors and develop new programmes, but we hope a wider audience will find it a useful reference tool. To this end it is available on our website at www.somersetcf.org.uk/publications



Key Fact: In 2006 there were 492 new cases of breast cancer in Somerset

South West Fishing for Life

South West Fishing for Life is a fishing club for ladies who have suffered, or are suffering with, breast cancer and their carers. The casting movement has proved very beneficial to rebuild tissues and muscles affected by cancer following operations. Ladies come from all over the county, meeting new people who have been through similar experiences. With our support they have been able to increase the number of ladies benefitting from 6 to 25.

Jill King, one of the women using the group said, "I look forward to each of our meetings with like-minded people, making new friends with something new to talk about and get excited about."



Key Fact: There are an estimated 7,500 people with dementia in Somerset (Dementia Awareness, June 2009)

Alzheimer's Society Memory Cafe

Alzheimer's is the most common form of dementia, with symptoms such as loss of memory, confusion and problems with speech and understanding. It robs people of their lives and can have devastating effects upon their family and friends.

SCF fund-holders Impey UK asked us to help them find a project supporting vulnerable older people in South Somerset. After considering a range of options, they decided to support the South Somerset Branch of the Alzheimers Society in their efforts to establish a "Memory Cafe" in Chard.

The cafe is for people with Alzheimer's or a dementia, their carers, friends and family to get together over tea, coffee and cakes to share experiences, gain support and discuss relevant issues. Living with dementia or caring for someone with dementia can be a very isolating and distressing experience and the cafe provides a simple way to share the burden for a while with others in a similar situation.



Castle Cary Out of School Club

Castle Cary Out of School club was set up by local parents in 2003 to give new opportunities to children aged 4 to 14 to play safely and learn new skills. They operate both after school and during holidays. By providing these opportunities, the club helps children to socialise with their peers outside of the classroom and enabled parents to continue in, or return to, employment. Activities are supervised by experienced staff from the local pre-school.

We were able to support them with a grant from the Crown Pet Foods Fund to buy in equipment to broaden the range of activities they could offer to all the children. With the grant they were able to buy in wellies and bug kits, which they used when they visited Carymoor Environmental Trust who were also supported from the same fund to run practical conservation projects with local children.

In addition to the Castle Cary Out of School Club, the Crown Pet Foods Fund has supported local Age Concern volunteers and the Carymoor Environmental Trust, giving the latter the resources to host visits from the Out of School Club along with many other local children to learn about wildlife and the environment.

“We’re delighted that our earlier decision to work with the Somerset Community Foundation has proved to be so beneficial for the selected charities,

says Alex Chadwick from Crown Pet Foods.

It is particularly pleasing to see that our support is delivering very real benefits to both younger and older members of our local community.”

Grants 2008/2009

Group Name	£	Funding for ...	Area
1st Castle Cary Scouts	2,000	Scout hall kitchen update	SS
1st Chard Wheelers Cycling Club	766	Cycling coaching courses	SS
3rd Sparkford Scout Group	750	Tent repairs and camping equipment	SS
Acorn Project	5,000	Drop in centre for people with mental health issues	TD
Age Concern Somerset (Shepton)	1,200	Help and support for older people	M
Akbayan League of Filipinos Friends & Families	2,050	Multicultural dance workshops	S
All Saints Community Hall	1,000	Hall improvements	SS
Alphabet Pre School	850	Pre School activities	M
Alzheimers Society	2,969	Establishing a fortnightly dementia specific café	SS
Arthritis Care (Bridgwater)	500	Help and support for people suffering from Arthritis	S
Arthritis Care (Yeovil)	536	Driver training costs	SS
Ashcott and Shapwick Cricket Club	1,280	Coaching fees and courses	S
Ashill Village Hall Committee	1,000	Drainage maintenance works	SS
Avalon Junior Hockey	2,324	Sports training and equipment	M
Back on Track	6,402	Riding for disengaged youth	S
Barrington Players	300	Sound and lighting equipment for community theatre group	SS
Bradford on Tone Village Shop Association	1,000	Alterations to retail space in village shop	TD
Bridgwater Family Support Group (Pop Inn)	2,100	Co-ordinator for activity sessions	S
Bridgwater Women Aid	3,750	Weekly exercise sessions for women and children	S
Carers UK - East Somerset	315	Christmas party for young carers	M
Carymoor Environmental Trust	1,200	Practical conservation projects for excluded children	SS
Carymoor Parish Council	250	Local villages website set up	SS
Castle Cary Out of School Club	1,000	After school sports and dance workshops	SS
Chard Detached Youth Work Project	5,000	Expansion of "Meals and Meeting" project for disaffected youth	SS
Chard Intentional Peer Support Group (CIPSG)	500	Set up costs for mental health support group	SS
Chard Rugby Football Club	1,600	Sports equipment	SS
Charlton Horethorne Village Hall	500	Kitchen renovations	SS
Cheddar Youth Sports Festival	2,000	One day sports festival for young people	S
Chilthorne Domer Youth Sports Club	260	Performing arts workshops for young people	SS
Chipstable Parish Community Hall	3,500	Disabled access ramp	TD
Churchstanton Out of School Club	4,560	After School activities	TD
Clarrie Dunbar Disabled Bowlers	3,000	Disabled access ramps and equipment	M
Clowns	954	Outreach Playbus to families in rural areas	WS
Community Council for Somerset	500	Organise Local Area Panels	S
Croscombe Village Shop	3,500	Disabled access improvements to village shop	M
Crowcombe Pre-School	1,500	Toys and equipment	WS

Cruse Bereavement Care	2,500	Counselling sessions for bereaved young people	C
Curry Rivel Cricket Club	3,538	Coaching courses and support for young people	SS
Donyatt Village Hall	5,000	Outdoor play equipment	SS
Dulverton & District Young Peoples Project	2,000	Dance workshops for young people	WS
Dunkery Pre-School	5,000	Pre-School activities	WS
E.M.N. Community Hall	1,000	Kitchen renovations	TD
East Huntspill Pre-School	480	Music and movement sessions	S
Engage CVS	500	Organise Local Area Panels	WS
Escape Support Group	220	Wheelchair accessible coach hire trips	TD
Evercreech Youth Club	3,100	Youth-led dance project	M
Exmoor Young Arts	1,500	Drama club for young people in rural area	WS
Exmoor Youth Project	1,000	Homework club for children in rural areas	WS
Expression Theatre	4,813	Stage extension and equipment for community theatre group	SS
Faulkland Youth Club	5,000	New youth club house	M
Fivehead Playing Field Management Committee	1,000	Open access multi-use games area	TD
Friends of Apex Leisure and Wildlife Park	2,615	Events, workshops and national play day activities	S
Friends of Cutcombe School	2,000	After school environment and gardening club	WS
Frome Association for Holiday Activities	850	Affordable out of school holiday activities	M
Frome Autistic Support Team	1,650	Outings and activities for autistic children and their families	M
Frome Residents Centre	2,010	Flooring and equipment	M
Frome Story Circle	1,338	Environmental story telling project	M
Frome Town Ladies Football Club	2,000	Equipment and running costs	M
Godney Playing Field Trust	2,214	Ride on mower and equipment	M
Growing Space	1,000	Propagation house for community garden	SS
Highbridge Community Youth Club	2,686	Sports Worker for new Youth Group	S
Hinton St George Village Plan Steering Group	1,000	Village Plan	SS
Home Start West Somerset	1,000	Home visiting service for young families	WS
Horton Victory Hall	5,000	Kitchen renovations	SS
In Touch Project	2,395	Self help for people with addictions	C
Inside Out People	2,500	Skills training for people with aquired head injuries	SS
Kilve Village Hall	2,500	Repairs to hall roof	WS
Leigh on Mendip Community Activity Group	650	Improvements to Active Living Centre	M
Linx Project (The)	2,328	Portable Youth Club - REACT Bus	SS
Little Steps Toddler Group North Barrow	550	Safe baby area and toys	SS
Live N Up	4,894	Multi-media equipment for youth performance group	TD
Lydford on Fosse Sports Club	4,910	Outdoor play equipment	M
Marston Magna Village Hall Management Committee	500	Light weight tables for elderly users	SS
Martock Pavilion Pre School	1,000	Pre School activities	SS
Mean Moves	2,800	Dance sessions for young people	M
Mendip All Drummers	1,251	Drumming sessions for all	M

Mendip Citizens Advice Bureau	1,000	Refurbishment of drop-in centre	M
Mendip Community Credit Union	1,200	Establishing new collection points	M
Mendip Community Support	500	Organise Local Area Panels	M
Mendip Disabled Association	2,205	Recreational facilities for disabled people	M
Mendip Womens Refuge	1,024	Sports activities for women and children	M
Merriott Bowling Club	1,150	Security system for clubhouse	SS
MIND in Taunton & West Somerset	1,000	"Directions" project - information and advice shop	WS
Minehead Cricket Club	2,000	Coaching and playing opportunities for girls	WS
Music Box	2,000	Music activity workshops for under 5s	SS
National Autistic Society (Somerset Branch)	1,500	IT training and support for branch database	C
North Petherton Football Club	645	Training items and equipment	S
Norton Fitzwarren Village Hall	380	"Crazy Apple" live venue website set up	TD
Open Daws (Disabled Activities in West Somerset)	1,000	Scuba diving taster sessions for disabled people	WS
Options - Pregnancy Crisis Care Centre	360	Training for advisors	C
Outdoor Challenge	1,819	Cycling activities for young people	S
Philippine International Neighbourhood Assoc	4,000	Basketball activity project	TD
Pitney Village Hall	2,000	Toilet refurbishments	SS
Pynsent Youth Football Club	3,350	Winter training and holiday coaching	SS
Queen Camel Youth Council	500	Village Fun Day	SS
Rosie Crane Trust	905	Drop-in centre for bereaved parents	C
Sedgemoor Community Partnership	4,920	Part-time development worker at Morland Hall	S
Sedgemoor Deanery Youth Project	1,000	Fun Day and residential trips for children in rural areas	S
Shepton Mallet Autism Support Group	1,000	Activities and workshops for autistic children and their families	M
Shipham Community Car Scheme	250	Voluntary community car scheme	S
Somerset Polish Community Association	1,000	IT equipment for drop-in centres	SS
Somerset Youth Volunteering Network	1,000	Display Boards for "Get Involved" Roadshow	C
South West Fishing for Life	2,134	Instruction and equipment for Breast Cancer Support Group	WS
Speak Up Somerset	1,014	Self help group for people recovering from mental ill health	C
Speak Up Somerset	2,000	Self help group for people recovering from mental ill health	C
SSVCA	500	Organise Local Area Panels	SS
St Paul's - Mendip Table Tennis Club	680	Free coaching for young people	M
Stanchester Media Arts Trust	583	Music technology course for young people	SS
STAR	3,000	Sports activities for disadvantaged young people	C
Stogumber Toddler and Tiddler Group	250	Rent costs	WS
Stogumber Toddler and Tiddler Group	1,000	Toys and equipment	WS
Stoke St Michael War Memorial Hall	5,000	Community building improvements	M
Stoke Youth Club	500	Internet café for young people	M
Stoke Youth Football Club	1,000	Training and CRB checks	SS
Story Roots	2,000	Volunteer training for story telling workshops	SS
Stratton on the Fosse Village Hall	3,500	Disabled access ramp and outdoor play area fencing	M

Sugar Water Curls Dance Group	2,000	Dance Classes for the over 50s	S
Sunday School Wood	2,415	Re-siting Storage Facility in community wood	SS
Sydenham Boxing Club	1,730	Non contact boxing for young people	S
Sydenham Short Mat Bowls Club	1,787	Replacement equipment	S
Taunton Deane CVS	500	Organise Local Area Panels	TD
Taunton Women's Refuge	1,750	Sports activities for women and children	TD
Tick Taac (The Arts for Adopted Children)	5,000	Arts activities for adopted children and their families	C
Time Out Together	1,000	Youth activities and community fun day	SS
Watchet and District Activity Group	1,000	Mountain bike activities for people on low incomes	WS
Watchet and District Activity Group	2,697	Mountain bike activities for people on low incomes	WS
Watchet Kids	2,030	One day circus and sports event for children	WS
Wells Cathedral Choir	725	School choir recording project	M
West Somerset Carriage Driving for the Disabled	2,500	Carriage alterations for disabled users	WS
Westbury and Draycott Thursday Club	550	Transport costs for members	M
Wimbleball Sailing Club Disabled Section	5,000	Provision of Disabled Toilets at Sailing Club	WS
Witham Friary Village Hall	2,000	Remedial works to hall floor	M
Withycombe Memorial Hall	300	Snooker table renovation	WS
Wivey Link Community Transport	1,000	New vehicle for community car scheme	TD
Woolavington Rural Activities Project	2,500	Junior Youth Culture Café	S
Wootton Courtenay Croquet Club	1,540	Lawn maintenance for one year	WS
Yeovil Division Guides	1,950	"Bright Sparks" production at The Octagon Theatre	SS
Yeovil Sequence Dance Club	750	Sequence and Old Time Dancing	SS
Yeovil Visually Impaired Bowls Club	1,540	Transport costs for members	SS

Team Somerset 500 Club: Thirty one awards totalling £24,240 were made to support the county's talented young athletes in the run up to the 2012 Olympics. For more information see page 17.

Key

M Mendip

S Sedgemoor

SS South Somerset

TD Taunton Deane

WS West Somerset

C Countywide

Key Facts

Number of applications: 307

Grants awarded: 170

Value of grants: £281,581

Average grant: £1,656



Key fact: In 2008/09 25,929 debt issues were raised with Citizens Advice Bureau in Somerset

Mendip Community Credit Union

At a time when the global financial system has been through its deepest crisis since the 1930s, the impact can be felt at the grassroots level.

Mendip Community Credit Union (MCCU) exists to help those who have nowhere else to turn. They combine a simple savings scheme to encourage responsible financial management with small loans to help people through difficult times.

MCCU is run entirely by volunteers who take a real pride in going the extra mile to provide a fantastic service while keeping their running costs low. To join MCCU, you need to either live or work in the area covered by Mendip District Council. This means that they know what's going on in the area, can respond to local problems and can provide a really personal service.

Our grant is helping MCCU to establish two new collection points in Shepton Mallet and Frome, reaching more vulnerable people excluded from mainstream banking than ever before.

Lynda, pictured left, was facing eviction with her daughter from her social housing after a turbulent period in her life. MCCU were able to help her with a small emergency loan just in time to beat the court order, and with the help of MCCU volunteer Kim Robinson (far left), she has been able to rebuild her life and is now a regular saver with the Credit Union.

She told us "If it was not for the hand-up loan my daughter and I would not have had a roof over our heads."



Key Fact: "In 2006 it was estimated that 14% of children in year 6 classes in Somerset were obese." Local Schools Survey

Special Project: Somerset 500 Club

In less than three years the Olympic Games will take place in London and Alan Gloak, former Chairman of Somerset County Council, has set up an exciting project to create an Olympic legacy for Somerset.

The Team Somerset 500 Club focuses on two initiatives around sport, participation, health and well being in the county. The first initiative aims to support young Somerset athletes who have the potential to represent Great Britain at the London 2012 Games and Paralympics, and beyond.

The second initiative involves the creation of an endowment fund (The Team Somerset 500 Club Healthy Living Fund) which will support community projects promoting healthier living through sports, physical exercise and other means. At a time when there is widespread concern around obesity in children and adults, anti-social behaviour and increasingly stressful lifestyles, community based sport and health living initiatives have an important, long term role to improve the quality of life for many people. Recently a number of grant recipients met HRH the Earl of Wessex.



Special Project: Rural Disadvantage Project

Somerset is a beautiful and often idyllic county to live and work in, but hidden beneath the surface there are thousands of people who have to overcome disadvantages as a result of their rurality. Very often national grant programmes are targeted solely at selected urban areas, yet our research has shown that there are very significant levels of disadvantage in rural areas as well.

As an independent local grant-making Foundation we have identified this as an issue we need to tackle. In 2007 we were awarded a three year grant from the Goldsmith Company Charity to set up a specific programme. The programme has two elements: funding for a small grants programme and support to build endowment funds to sustain our grant-making in rural areas for the long-term.

Before we started, we convened a meeting of a number of stakeholders, from the Community Council for Somerset to the Diocese of Bath and Wells, to determine the priorities for a small grant programme. We concluded that there were two main areas where we could make a difference:

- Support for projects that help build stronger communities in the face of rapidly evolving social changes.
- Projects designed to help improve the quality of life of a specific group disadvantaged by their rurality.

To date, we have made 29 grants to a wide variety of projects across the county, including Shipham Community Car Scheme. Furthermore, the recent growth in our endowment fund means we are well on our way to sustaining our role in rural Somerset for many years to come.

Shipham Community Car Scheme

Living in the beautiful Somerset countryside has many benefits, but if you do not have access to a car it can also be exceptionally isolating. One of the solutions can be found in community car schemes, where volunteer drivers use their own cars and time to help people get where they need to be on time.

The Shipham Community Car Scheme started in 1997 in response to a growing local need. Mrs Anne Graves has relied on the group since she was forced to stop driving. "I had to give up driving in 2005 and since then I have I relied on them to get to the shops, the doctors and to make appointments at the hospital in Weston-Super-Mare."

Our grant enabled them to ensure their drivers were able to receive the most up to date first aid training.

Key fact: At the last Census over 13,000 households in rural Somerset did not have access to their own car

Leaving a legacy to Somerset

When Donald Lake passed away in 2008 at his home in Yeovil he left his estate to charity. Working with his executors we have agreed to establish a memorial fund in his memory as part of our endowment fund for Somerset. The fund will be dedicated to projects that reduce isolation and loneliness, and promote active lifestyles amongst older people throughout the county.

Leaving a gift to Somerset Community Foundation is a simple but very effective way to make a lasting difference to the people and causes you care most about. Your gift could be used to support a wide range of charities and voluntary sector groups working in Somerset, although if you have one or more preferred charities we would be happy to make regular gifts to them as well. Donations of any size are welcome to support our grants programmes, enable us to undertake independent research into local issues or support our future growth.

A gift of £25,000 or more could be used to establish a 'Named Fund' through which we would be able to support the areas and issues that matter most to you. We would also be very happy to work with your family or friends to target grants from your fund.

Making a will is obviously a very important step to take and we always encourage our supporters to take professional advice. However if you wish to discuss in confidence how you may support the Foundation with a legacy, please do not hesitate to get in touch with Justin Sargent on 01749 344949.



“Somerset Community Foundation has exceeded beyond my expectations. They have done a fantastic job.”

David Price, Managing Director of Cosyfeet and SCF Fund Holder

Funds managed by SCF 2008/09

Our grant making programme is made possible through funds managed by the Foundation, the majority of which are made available to the county through the commitment of local families, individuals and trusts.

Angela Yeoman Fund*
Christopher and Heather Virgin Fund*
Christopher Tanner Memorial Trust
Cosyfeet Fund
Crown Pet Food Community Fund
Grassroots Grants (funded by the Office of the Third Sector)
Field House Trust
Hydrex Fund*
Impey UK Trust Fund
John and Celia Bonham Christie Trust
John and Dorothy Ball Fund*
McGreevy Charitable Trust Fund*
Millfield Students Community Fund
Party Packs Fund*
Peter Wyman Fund*
Rural Fund
Shoon Fund
Sir John Wills Memorial Fund
Somerset Giving Fund
Somerset Grassroots Grants Fund*
Somerset Restorative Justice Fund
Summerfield and Tauntfield Fund*
Team Somerset 500 Club*
WCS Pickford Trust
West Somerset Relief Fund
Yeovil Town FC Fund*

* These funds have been boosted by the Grassroots Grants Endowment Match Challenge, funded by the Office of the Third Sector.

Thank you

In 2008/09 we have benefitted more than ever from a wide range of donors and supporters. Unfortunately there is not sufficient space here to acknowledge every donor, but every gift is very gratefully received. Thank you one and all!

Patrons

Mr N Gould &
Mrs L Lawrence
Mr & Mrs B Grave
Mr R Lloyd
Mr & Mrs D Medlock
Mr D Price
Mr & Mrs T Smallwood
Mrs K Turner
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Mr C Davies
The Hon Mrs R Pease
Captain G Rodgers
Mr & Mrs N Whittaker
John & Celia Bonham
Cristie Trust
Nani Huyu Charitable Trust
Bhere Ltd
Golledge Electronics Ltd
Holemoor Properties Ltd
Poole & Co

Ambassadors

High Sheriff of Somerset
Mr J Alvis
Mrs G Andrews
Mr & Mrs J Aram
Dr S Biddell
Mr & Mrs R Blackburn
Dr J Bowman CBE
Mr A Brooking-Clark
Mrs F Drummond
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Mr S Lawrence
Mr J MacDonald Lyon
Mr & Mrs Tim Mercer
Mr R Pedder
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Mrs Brian Perowne
Mr and Mrs R Peto
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Mr & Mrs A Carpenter
Mr & Mrs A Carr
Mrs P Chapman
Mrs M Clark
Mrs V Constable
Mrs B Cox
Col & Mrs C Cumberlege
Mr S Davies
Mrs F Densham
Mrs B Farley
Brigadier & Mrs A I H Fyfe
Mr & Mrs N Gillibrand
Mr Z Gregor
Mrs Hill

Mr & Mrs A House
Mr & Mrs D Macarthur
Mr & Mrs J Mendelssohn
Mr & Mrs M Ogden
Mrs A Parsons
Brigadier H Pye OBE
The Hon Miss A Rees-Mogg
Mrs H Ricketts
Mr & Mrs M Rose
Mrs B I R Rowe
Mr J Sargent
The Rev Canon &
Mrs J Simpson
Sir B Stewart Wilson KCVO
Mr & Mrs C Waldron
Mr & Mrs J S B White
Mr C Whittaker
Mr J Wilcox
Mrs C Yates OBE
Mr & Mrs E Yates

In addition we would like to acknowledge the support of the following organisations who support the Foundation:

Aggregate Industries	Big Lottery (BASIS programme)	Butler, Tanner and Dennis
Community Development Foundation	The Corporate Group	Frome Selwood Rotary Club
Goldsmiths Charitable Company	Greenslade Taylor Hunt	The Inner Wheel Club of Frome
Medlock Charitable Trust	Mercer Design and Photography	Old Mill Accountancy LLP
Somerset County Council	South West Regional Development Agency	Wessex Water

Summary Financial Statement for the year ended 31 March 2009

	Unrestricted Fund £	Restricted Funds £	Other £	Endowment Fund £	Total 2009 £	Total 2008 £
INCOMING RESOURCES						
Incoming Resources from Generated Funds						
- Voluntary Income	15,232	-	65,976	235,811	317,019	105,267
Activities for Generating Funds						
- Fundraising	18,784	-	1,610	-	20,394	18,302
Investment Income	7,087	8	20,426	-	27,521	20,857
Incoming Resources from Charitable Activities	5,962	4,269	342,271	102,168	454,670	545,265
Total Incoming Resources	47,065	4,277	430,283	337,979	819,604	689,691
RESOURCES EXPENDED						
Costs of Generating Income	31,796	-	72,547	-	104,343	56,327
Charitable Activities	27,374	4,292	311,385	-	343,051	460,941
Governance Costs	17,141	-	5,388	-	22,529	21,061
Total Resources Expended	76,311	4,292	389,320	-	469,923	538,329
NET (OUTGOING)/INCOMING RESOURCES FOR THE YEAR BEFORE TRANSFERS	(29,246)	(15)	40,963	337,979	349,681	151,362
Transfers	11,792	-	(11,792)	-	-	-
NET (OUTGOING)/INCOMING RESOURCES BEFORE OTHER RECOGNISED GAINS AND LOSSES	(17,454)	(15)	29,171	337,979	349,681	151,362
Unrealised Losses	-	-	-	(12,471)	(12,471)	(24,404)
Realised Losses	-	-	-	(22,705)	(22,705)	(2,222)
NET MOVEMENT IN FUNDS FOR THE YEAR	(17,454)	(15)	29,171	302,803	314,505	124,736
FUND BALANCES BROUGHT FORWARD	89,602	15	104,267	279,459	473,343	348,607
FUND BALANCES CARRIED FORWARD	72,148	-	133,438	582,262	787,848	473,343
SUMMARY CONSOLIDATED BALANCE SHEET as at 31st March 2009						
	Group 2009 £	Group 2008 £	Charity 2009 £	Charity 2008 £		
FIXED ASSETS						
Investments	339,967	253,252	-	-		
CURRENT ASSETS						
Debtors	132,798	41,627	26,192	23,983		
Bank	323,326	196,173	179,541	182,174		
Total Current Assets	456,124	237,800	205,733	206,157		
CREDITORS: amounts falling due within one year						
Net Current Assets	(8,243)	(17,709)	(22,767)	(17,709)		
Net Assets	447,881	220,091	182,966	188,448		
	787,848	473,343	182,966	188,448		
FUNDS						
Unrestricted Fund	72,148	89,602	64,489	88,404		
Restricted Funds - LNF	-	15	-	15		
- Other	133,438	104,267	118,477	100,029		
Expendable Endowment Fund	582,262	279,459	-	-		
Total Funds	787,848	473,343	182,966	188,448		

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE) CONSOLIDATED STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2009

The summary financial statement is a summary of information taken from the full statutory financial statements for the year ended 31 March 2009 which were approved on 9th September 2009 and which have been submitted to the Charity Commission and the Registrar of Companies. The auditors' report on the annual financial statements was unqualified.

The summary financial statement may not contain sufficient information to allow for a full understanding of the financial affairs of Somerset Community Foundation. For further information, the full annual financial statements, which contain the auditor's report and trustees' annual report, should be consulted. Copies of these can be obtained from Somerset Community Foundation, Yeoman House, The Royal Bath and West Showground, Shepton Mallet, Somerset BA4 6QN.

Independent Auditor's Statement to the members of Somerset Community Foundation.

We have examined the summary financial statement which comprises the Summary Consolidated Statement of Financial Activities and the Summary Consolidated Balance Sheet set out above.

Respective responsibilities of trustees and the auditor. The trustees are responsible for preparing the annual report in accordance with United Kingdom law.

Our responsibility is to report to you our opinion on the consistency of the summary financial statement within the annual report with the full annual financial statements and the trustees' report, and its compliance with the relevant requirements of section 240 of the Companies Act 1985 and the regulations made thereunder. We also read the other information contained in the annual report and consider the implications for our report if we become aware of any apparent misstatements or material inconsistencies with the summary financial statement.

We have not considered the effects of any events between 11 September 2009, which was the date we signed our report on the full annual financial statements, and the date of this statement.

Basis of opinion

We conducted our work in accordance with Bulletin 1999/6 'The auditors' statement on the summary financial statement' issued by the Auditing Practices Board. Our report on the charity's full annual financial statements describes the basis of our audit opinion on those financial statements.

Opinion

In our opinion the summary financial statement is consistent with the full annual financial statements and trustees' report of Somerset Community Foundation for the year ended 31 March 2009 and complies with the applicable requirements of section 240 of the Companies Act 1985, and the regulations made thereunder.

Old Mill Accountancy LLP
Chartered Accountants and Registered Auditor
The Old Mill, Park Road, Shepton Mallet, Somerset BA4 5BS 9th October 2009

Our new offices



Yeoman House

In September 2009, the SCF team moved into their new offices, Yeoman House, at the Royal Bath and West Showground. This new location will help make us more visible in the county, helping to raise our profile to a wider audience.

The building has two floors, with small meeting rooms (available for hire) on each level.

Please do not hesitate to come and meet us if you are thinking about applying for a grant, you wish to make a donation or if you simply want to find out more about our work. We are always happy to see you.

Volunteering

Volunteers are increasingly becoming important for the work of the Foundation, and we are always on the lookout for more!

For example:

- Additional support in the office
- Visiting projects and monitoring their progress
- Organising Fund-raising initiatives
- Making presentations on our behalf.

If you would like to get involved please do not hesitate to contact us.



The Diamonds and Tweed Ball in aid of SCF was organised largely by volunteers.

Somerset Community Foundation

President

Lady Gass, Lord-Lieutenant of Somerset

Vice-Presidents

Lord Armstrong GCB, CVO * Ian Hay Davison CBE *

The Right Reverend Peter Price (Bishop of Bath and Wells) *

Alan Gloak (to June 2009)/John Edney (from August 2009) Chairman,
Somerset County Council * Sandy Evans * Richard Case CBE DL

Chairman

Angela Yeoman OBE, DL (to Oct 2009)

Peter Wyman CBE (from Oct 2009)

Trustees

Michael Fiennes * Sir Michael Ferguson Davie Bt *

Dr John Bowman CBE * Claire Blackburn * Charles Clark *

Tim Chappell MBE * Chris Davies CBE * David Jenkins *

Brig. Hugh Pye OBE * Stuart Thorne * Mark Saxton *

Jane Lock * Dr Nick Kippax (to Aug 2008)

SCF Endowment

Chairman

Ian Hay Davison CBE (to February 2009)

Stephen Evans (from February 2009)

Michael Cansdale * Sir Michael Ferguson Davie Bt *

Michael Fiennes * Angela Yeoman OBE, DL

Staff

Chief Executive Justin Sargent

Grants and Finance Manager Jocelyn Blacker

Business Development Manager Julie Patterson

Business Development Advisor Ellie Anderson

Grants and Office Support Karen Collins



Contact Us

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The Royal Bath and West Showground,
Shepton Mallet, Somerset BA4 6QN

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Somerset Community Foundation

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Registered in England and Wales No 4530979

SCF Endowment

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