



somerset  
COMMUNITY | FOUNDATION



Annual Review **2013/14**

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LAST YEAR I REPORTED A YEAR OF STEADY PROGRESS. THIS YEAR HAS BEEN ONE OF UNPRECEDENTED ACTIVITY ON MANY DIFFERENT FRONTS, DOMINATED BY OUR HUGELY SUCCESSFUL APPEAL FOR THE SOMERSET FLOOD RELIEF FUND SET UP IN RESPONSE TO THE DREADFUL FLOODING ACROSS THE LEVELS DURING THE WINTER.

“Ensuring we use our resources in ways which will have the biggest impact on the problems faced by those who need our help is a vital but far from easy task.”

A detailed report on the Fund can be found later in this review, but may I add my personal thanks to the many members of the public who donated to the appeal; to the organisations and businesses that provided both money and support; to the volunteers who worked tirelessly to help us cope with the enormous workload suddenly confronting us; and to the Chief Executive and his team who bore the brunt of the work over the winter and spring. Thank you all for your truly inspirational commitment and contribution.

On financial matters I am pleased to be able to report a small unrestricted surplus for the year. Despite the difficult economic climate since 2008, we have been able to achieve a surplus

in each year since our inception in 2002 due to the generosity of our donors and our relentless control over administrative costs. I am also pleased to be able to report a 16% increase in our Endowment Fund, bringing this to a total of £3,661,698 at the year end. However, since our target is for a fund of £5m by the end of 2015 there is no room for complacency.

In 2013/14 we made grants of £332,108, excluding those from the Somerset Flood Relief Fund. I would particularly like to thank the trustees and volunteers on our Grants Committee for their knowledge, dedication and hard work in making sure we use the money available to us for grant-making in the most effective way. Ensuring we use our resources



in ways which will have the biggest impact on the problems faced by those who need our help is a vital but far from easy task.

In addition to continuing with our Surviving Winter and Raising Aspirations programmes, we have agreed with Somerset County Council to set up a social investment fund to support social enterprises, businesses and charities. Social enterprises are forming an increasing part of business

today, running an ever-widening range of services to the benefit of the wider community. I am very excited by the potential for this scheme to make a large and enduring contribution to the county in a new and different way.

“I am very excited by the potential for this scheme to make a large and enduring contribution to the county...”

Two trustees, John Bowman and Charles Clark, are retiring after many years of long service. John has been a tower of strength to the Foundation, most notably in connection with our grants programme and most recently taking an active role in the Somerset Flood Relief Fund. I am delighted to say that he has agreed to continue to support our Grants Committee. Charles has provided excellent support, advice and guidance to the Foundation and most recently in the development of the Somerset Social Enterprise Fund.

Finally, my very sincere thanks to all our supporters, volunteers, trustees and staff, without whom nothing would be possible, with a very special thank you to Justin Sargent, our Chief Executive, whose personal commitment and contribution to the Foundation is, quite frankly, exceptional.

Peter Wyman, Chairman



Haygrove School donates to Flood Relief



# working in partnership

Courtesy of SWNS.com





# strengthening communities

OVER THE PAST TWELVE MONTHS WE HAVE SEEN HOW WE CAN BOTH RESPOND TO A MAJOR SHORT-TERM CRISIS AS WELL AS MEET THE NEED FOR LONGER-TERM SOCIAL CHANGE.

At our 2013 Annual Celebration, Lord Wei of Shoreditch highlighted the importance of Community Foundations and how their work “brings hope to communities” by creating opportunities. It was a fresh and welcome endorsement of our work from one of the UK’s leading exponents on social reform.

During 2013/14 we gave more people than ever the opportunity to make a difference in Somerset. The leadership we demonstrated when setting up an appeal to help those most affected by the flood crisis is the most obvious example of this (and we focus on this on pages 19 to 22). But we must not overlook the importance of our day-to-day work, connecting our supporters with over 150 local charities and voluntary organisations throughout Somerset this year.

Smaller organisations are very effective at tackling grassroots problems in our communities, but many struggle - year in, year out - to find the necessary resources to carry on. They are generally more dependent on local fundraising and donations than larger charities, but conversely are less well-resourced to raise these funds.

In December 2013 UK Community Foundation’s ‘Shine a Light’ research report found that people are nearly twice as likely to feel confident that giving locally, as opposed to nationally, helps those who need it most. In addition to this, over half would give more locally if giving was easier and they could see the impact of their donation.

This is precisely why Somerset Community Foundation exists. From people who wish to give their Winter Fuel Payment to help pensioners

struggling to pay their winter bills, to those who wish to create new funds for the areas they care most about, we help them keep their giving local, coordinated and effective. And in doing so, we are able to give people running high-impact projects and concepts the opportunity to realise their dream.

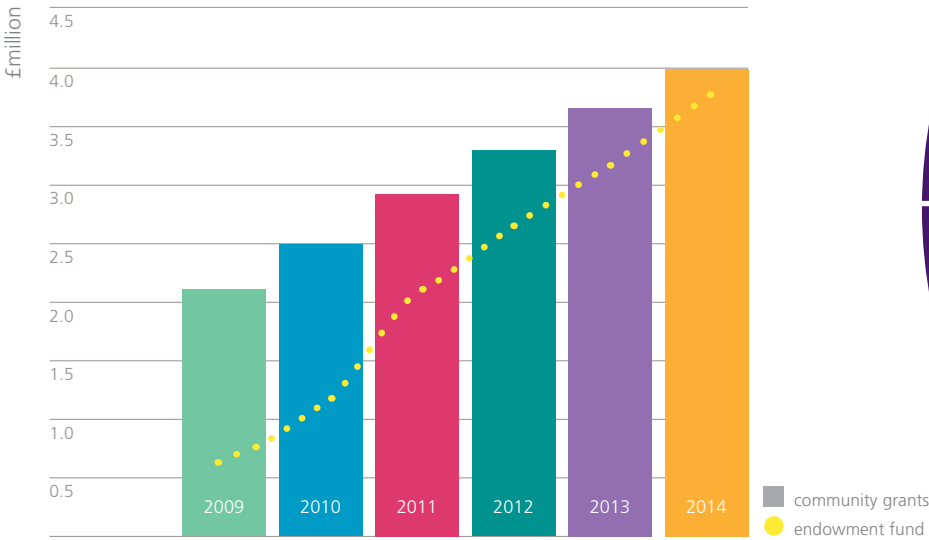
Finally, I would like to pay tribute to our small team of staff, volunteers and trustees for their hard work and commitment which has made 2013/14 the most extraordinary and successful year of our short history. We continue to do everything we can to help the flood-affected communities recover their homes and livelihoods, and we wish them well on their journey. We also salute the hundreds of charities and thousands of volunteers that make such a difference to us all - every day of the year.

Justin Sargent, Chief Executive

2013/2014 FINANCIAL HEADLINES

In the year ended March 31, 2014 our overall expenditure on charitable work was £687,487, including £308,682 through our regular grants programmes. £258,276 of grants was donated to flooded households and donations made to groups through Localgiving.com and delivery of our Raising Aspirations initiative. Excluding grants awarded through flood relief programmes in 2012 and 2014, we have awarded £3.9m of grants to local communities since 2002.

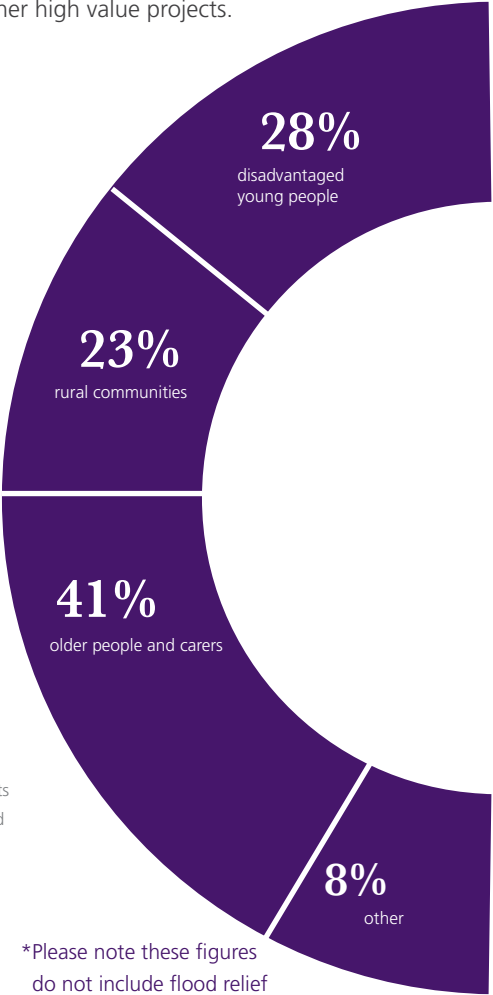
To ensure that we can sustain this essential financial assistance to our communities far into the future, we have also continued to build our endowment. £534,921 was donated to the endowment during 2013/14, increasing it to almost £3.7m. During the last quarter of the year over £1.08m was also donated to the Somerset Flood Relief Fund.



During 2013/2014  
our Endowment Fund  
grew by 16% to **£3,661,698**

Grants awarded\*

Our regular grants programmes continue to be targeted towards three priority areas that reflect important issues in Somerset and the wishes of our donors, but we continue to support other high value projects.



\*Please note these figures do not include flood relief grants or funding delivered through the Localgiving.com website.

“A recent grant has enabled Dulverton & District Young People's Project to continue with their hugely popular evening drop-in sessions for rurally disadvantaged 6 - 10 year olds.”

+++++  
Jude Atkins, Dulverton & District Young People's Project



GRANTS TO ORGANISATIONS 2013/2014

Applicant	Amount	Funding for...	Area
1182 Shepton Mallet Squadron Air Training Corps	522	First aid and life saving training equipment	M
2BU	1,000	Support for young LGBT people in their coming out journey	M
1st Watchet Sea Scout Group	250	Life saving and first aid equipment	WS
Accessible Transport West Somerset	3,950	Volunteer driver training and passenger assistants	WS
Advocacy in Somerset Ltd	2,500	Befriending and advocacy for people in care homes	C
Ash Millennium Wood management group	500	Development of outdoor educational and community resource	SS
Ashill Village Hall Committee	285	Lunch club supporting rurally isolated older people	SS
Back on Track	3,200	Horse care course for children with behavioural difficulties	M
Blackdown Golden Age	440	Social activities for the over 60's	TD
Bridgwater & District Civic Society	1,489	Community garden in area of disadvantage	S
Bridgwater Area Assoc for the Elderly	1,000	Healthy meals for older, vulnerable people	S
Bridgwater Arts Centre	2,261	Cultural and social activities for young adults	S
Bridgwater Visually Impaired Bowling Club	687	Storage facility for bowls equipment	S
Burnham-on-Sea Bowling Club	1,000	Bowls buggy for people with impaired mobility	S
Burnham-on-Sea Hard of Hearing Association	500	Activities for people with hearing impairment	S
Care and Share Time	600	Transport and activity costs for isolated, older people	SS
Carers UK East Somerset	250	Information day for registered carers and their families	M
Central Somerset Outdoor Learning Partnership	750	Expansion of woodland volunteering opportunities	SS
Chard WATCH CIC	15,835	Peer support for people living with mental illness	SS
Chard Young Peoples' Centre	5,000	Youth activities for 11 - 19 yr olds	SS
Cheddar Valley Plus	3,000	Emergency food and support for people in crisis	M
Chilcompton Playgroup	750	Supervised creative and social play for babies and toddlers	M
Children's World	2,762	Educational and creative workshops for children with additional needs	M
Churchinford Community Shop	750	Development of community hub	TD
Chilthorne Domer Youth Sports	108	Educational workshops for young people on the dangers of smoking	SS
Community Council for Somerset	19,772	Signposting and referral service for people affected by the floods	C
Compass Disability Services	1,500	Website access for people using BSL as their first language	C
Corfe Pitminster & Trull Almshouses	2,000	Repairs to almshouse cottages for disadvantaged tenants	TD
Coxley Memorial Hall	1,000	Replacement boiler in community building	M
Crewkerne Allotment Team	200	Composting toilet and handwashing facilities	SS
Crowshute Centre	1,000	Kitchen equipment for community centre	SS
Cruse Bereavement Care	2,000	Counselling for people suffering bereavement	C
deafPLUS	2,500	Mobile advisory service for hard of hearing	C
Donyatt Village Hall	1,739	Kitchen upgrade and purchase of wheelchair	SS
Dulverton & District Young Peoples' Project	2,000	Youth club activities for 7 - 10 yr olds	WS
Dulverton Seniors' Table Tennis Club	200	Low impact activities for the elderly	WS
Edventure Frome CIC	3,815	Community 'train and do' hub working with unemployed adults	M

Escape Support Group	1,600	Support to families of special needs children	TD
Evercreech Friendship Club	528	Social activities for the over 60's	M
Exford School Trust	1,926	Upgrading of community play area	WS
Friends in Retirement	250	Activities for older people	S
Friends of Dunster School	500	Forest school activities	WS
Friends of Somerset Carers	1,000	Days out for carers of people with mental health problems	SS
Frome and District Day Centre	880	Lunch project bringing together students and older people	M
Good Fellowship Club	750	Social activities for physically challenged older people	SS
Golden Oldies	2,316	Singing and movement workshops for older people	M, SS
Growing Roots	795	Intergenerational gardening project	M
Hatch Beauchamp Village Hall	500	Lighting equipment for community use	TD
Heads Up	2,000	Healthy eating courses for people suffering mental ill health	M
Henhayes Centre	2,000	Group activities for dementia sufferers and their carers	SS
Holly & Hawthorn Forest School	600	Forest school sessions for children from low income families	M
In the Mix CIC	1,000	Summer activities for disadvantaged young people	TD
Kingsdon Centre	722	Community shop and café pilot project	SS
Knightstone Housing Association	2,000	Gym sessions and healthy eating project for young homeless people	SS
Lane Estate Tenants & Residents Association (LETRA)	1,000	Improvements to local community park	TD
Langport and Huish Senior Citizens Club	1,000	Social activities for older people	
Langport Church Community Trust	400	Multi media resource for community use	SS
Long Sutton Village Hall	1,750	Village hall refurbishment	SS
Mean Feet Dance	3,000	Dance sessions for people recovering from mental ill health	M, SS
Mid Somerset Tinnitus Self-Help Group.	750	Support for tinnitus sufferers	C
Mind Taunton and West Somerset	1,900	Community Care Law specialist advice and advocacy	TD, WS
Misterton W I	1,850	Kitchen upgrade for older people's luncheon club	SS
Muchthorn Flood Wings	400	IT equipment for flooded community on the Levels	SS
National Farmers' Union	10,000	Support for flood-affected farmers	
Neroche Woodlanders Ltd	3,770	Forest school activities for families	TD
Nynehead Under 5's	750	Equipment for pre-school activities	TD
Oaks Social Club	1,000	Support group for vulnerable older people	WS
On Your Bike	2,200	Training and support to vulnerable adults	TD
Outdoor Challenge	2,000	Holiday activities for disadvantaged young people	S
Parks Active Living	3,328	Nutritious lunches for vulnerable older people	WS
Porlock Ford Community Hall	750	Sports equipment for groups in rural community	WS
Positive Action on Cancer	2,500	Counselling sessions for older people affected by cancer	M
Puriton Allotment Association	1,000	Community allotment improvements	S
Puriton Over 60's	450	Activities for older people	S
QwesT FtM UK	300	Support meetings for transexuals	TD
Relate Exeter & District	3,000	Family counselling	S



Relate Dorset & South Wiltshire	2,500	Relationship counselling	SS
Relate Mid-Wiltshire	2,000	Counselling service for vulnerable individuals	M
Roadwater Art Group	500	Affordable art workshops for the elderly	WS
Roundabout Pre School	696	Improvements to pre-school facilities	WS
SODA Frome (Society for Disabled Artists)	750	Art sessions for people with disabilities	M
Somerset Care and Repair	1,500	Training and work placements for young unemployed	M, SS
Somerset Levels RDA Carriage Driving Group	1,000	Carriage driving for people with disabilities	M
Somerset Neurological Alliance	2,000	Directory of service for people living with a neurological condition	C
Somerset NHS Partnership	150	Support for carers looking after children suffering mental ill health	M, SS
Somerset Trust for Arts & Recreation	1,000	Activities for disadvantaged children and young people	C
South Barrow Recreation Trust	2,199	Village playing field equipment and maintenance	SS
Spaxton Village Hall	498	Village hall refurbishment	S
Speak Up Somerset	999	Art therapy sessions for people living with mental illness	SS
St Benedicts PCC	500	Christmas lunch for vulnerable older people	M
St John Fellowship (Tuesday Venture Club)	1,180	Social activities for older people	WS
Stoke St Michael Youth Club	1,000	Youth club activities	M
Sunshine Pre School	950	Forest school sessions for early years (0-4 yr olds)	S
Sydenham Amateur Boxing Club	1,000	Boxing activities in area of economic deprivation	S
Tacchi-Morris Arts Centre	3,407	Dance sessions for older people	TD
Ten Communities Youth	1,000	Outdoor educational sessions for young people.	TD
The Blackdown Healthy Living Centre	2,500	Activities for elderly and rurally isolated people	TD
The Heather Club (Speech After Stroke)	1,500	Activities for stroke survivors, families and carers	S
The Pod Youth Club	3,000	Activities for children with disabilities	M
Tone Dance	2,000	Dance workshops for older people and their carers	TD
TS5C	500	Trim trail facility for young people	M
Tuesday Toddler Group	900	Gym sessions for pre-school children and their parents/carers	WS
Victoria Park Community Centre	2,729	Youth club activities and exercise sessions for adults	S
Watchet Baptist Church	1,000	Weekly community meal for people in crisis	WS
Watchet Kids	900	Arts festival and workshops for young people	WS
Watchet Physical Training and Boxing Club	1,000	Community gym facility for all ages	WS
Wells Vineyard	900	Emergency food parcels for people in crisis	M
West Buckland Pre-School	800	Pre-school provision	TD
West Huntspill Under 5s	950	Forest school leader training	S
West Somerset Advice Bureau	9,132	Confidential advice and information for older people	WS
Weston Hospicecare	1,500	Volunteer driver expenses	S
WHERE	600	Café refurbishment for organisation supporting adults with a disability	TD
Williton Gardening Group	250	Social opportunities for gardening club members	WS
Wimbleball Sailability	1,000	Purchase of adaptive sailing boat	WS
Wincanton Community Venture	1,587	Equipment and protective clothing for forest school sessions	SS

Wookey Playgroup	849	Refurbishment of playgroup building	M
Work-Wise	600	IT for drop in centre supporting unemployed people	TD
Yeovil Carers	250	Advice and advocacy for carers of people with disabilities	SS

Key		
M Mendip	SS South Somerset	WS West Somerset
S Sedgemoor	TD Taunton Deane	C Countywide

Special Projects		
Applicant	Amount	Funding for...
Church of the City	500	Community work in lieu of Lord Wei of Shoreditch speaker fee
Flooding on the Levels Action Group (FLAG)	4,651	Volunteer expenses for flood relief
Hinton St George Community Shop	16,500	Community Shop Development
Local Giving	1,368	Local Giving Subscriptions
Smokefree Somerset Alliance Grants	1,669	Promoting smoke-free living
Surviving Winter	59,380	Surviving Winter Payments



FOCUS: IMPROVING LIFE OPPORTUNITIES FOR DISADVANTAGED CHILDREN, YOUNG PEOPLE AND THEIR FAMILIES

**MOST CHILDREN IN SOMERSET GROW UP HAPPY AND HEALTHY, BUT FOR A SIGNIFICANT MINORITY, CHALLENGES REMAIN. ACHIEVING QUALIFICATIONS AT AGE 16 CAN SET A YOUNG PERSON ON TRACK FOR A POSITIVE FUTURE, BUT IN SOMERSET MORE NEEDS TO BE DONE TO REDUCE ATTAINMENT GAPS BETWEEN VULNERABLE GROUPS AND THEIR PEERS, AND TO ENSURE SOMERSET IS IN LINE WITH NATIONAL AVERAGES.**

The gap between the most disadvantaged pupils and their peers widens as they progress through their education, and many vulnerable groups in Somerset lag behind their national counterparts, in spite of some recent improvements. Roughly 15% of all children in Somerset live in poverty, and this number is predicted to rise. Working does not provide a guaranteed route out of poverty: 66% of children growing up in poverty live in a family where at least one member works.

Voluntary and community groups play a vital role in combatting both the cause and effects of disadvantage on children and young people in Somerset. In 2013-14 Somerset Community Foundation awarded £67,058 to community groups supporting children, young people and their families. In addition, we awarded 72 grants of up to £500 each and amounting to £19,372 from the Eagle House Trust Fund to assist young people leaving the care system, helping them in their transition to work or further education.

**Children's World** provides workshops for children and young people in mainstream and special schools across Somerset, tackling issues such as bullying, physical and mental health. Our grant of £2,762 helped them to purchase a large scale projector, stand and screen, together with an upgraded lighting system, to allow the children to create and display their own creations during workshop sessions.

**Sydenham Amateur Boxing Club** provides fitness and competition for young people in the Bridgwater area. Our grant of £1,000 was used towards new equipment, allowing the club to continue to operate at a low cost to young people from disadvantaged backgrounds.

**Chard Young People's Centre** used our £5,000 grant to deliver a programme of exciting, enjoyable and varied activities for 11-19 year olds, two evenings a week in Chard. Qualified youth workers were supported by young volunteers to help young people with personal and social education and to reach their full potential. The teenagers were also given the opportunity to get involved with the running of the service as volunteers.





## TODAY, FOR THE FIRST TIME IN HISTORY, BRITAIN'S OVER-65s NOW OUTNUMBER PEOPLE UNDER THE AGE OF 16, AND IN SOMERSET WE HAVE A HIGHER PROPORTION OF OLDER PEOPLE THAN THE NATIONAL AVERAGE.

Whilst this has many advantages to the county, it also poses one of the greatest risks. It is now thought that loneliness can be as harmful for our health as smoking 15 cigarettes a day.\* We recognise the need to help older people most at risk of longer-term loneliness and social isolation. Our aim is to help them remain active, independent and positively engaged with society for as long as possible. In 2013/14 Somerset Community Foundation awarded £126,560 in grants to local community groups working with vulnerable older people.

**Tone Dance** promotes and supports the creativity and health of older people in villages around the River Tone. Our grant of £2,000 enabled a group of older dancers to deliver quality fun and fitness dance sessions to 100 people across 5 rural locations. The project has had great outcomes in terms of reaching and inspiring older people and their carers, improving their wellbeing and developing new friendships. A celebratory event to mark the completion of the project brought grandparents, parents and children together.

**Advocacy in Somerset** recognises the need for people in care homes who have little or no regular contact with friends or family to receive regular visits from someone from outside. The focus of the work is not only to provide social contact and friendship but also to give residents a voice on how their treatment and care is provided. Our grant of £2,500 allowed them to run a pilot befriending project using volunteers acting as 'Independent Visitors'.

**Frome and District Day Centre** invites young students from Frome Community College to join them for lunch and a chat to help the elderly and the younger generation socialise and get to know one another better. Our grant of £880 has enabled this project to bridge the gap between older people and children. One student commented, 'It was really good to talk to them; it was not what we'd imagined. We learnt all about how they used to have a good time when they were children despite having very little money.' Comments from the Day Centre participants included, 'When you see them as a group they are quite intimidating, but when you get to know them as individuals they are not.'

\*Holt-Lunstad J, TB, Layton JB. 2010. Social relationships and mortality risk: a meta-analytic review. *PLoS Medicine* 7 (7)





SOMERSET IS ONE OF THE TEN MOST RURAL COUNTIES IN ENGLAND WITH A POPULATION DENSITY OF 1.5 PEOPLE PER HECTARE, WHICH IS WELL BELOW THE ENGLAND AVERAGE OF 4.1.\* THE RELATIVE AFFLUENCE IN THE RURAL AREAS OF OUR COUNTY MASKS THE DIFFICULTIES FACED BY ISOLATED COMMUNITIES, WHERE ACCESS TO TRANSPORT AND ESSENTIAL SERVICES IS LIMITED.

Approximately 40% of the whole county's population live in England's 20% most deprived areas for geographical barriers.\* People within those communities often experience high levels of unemployment, a lack of affordable housing, poorer health and lower educational attainment. In 2013/14 Somerset Community Foundation awarded £70,997\*\* in grants to support projects helping to break down these barriers and increase the sustainability of rural communities at risk.

**Churchinford Community Shop and Cafe** provides a vital service to the village with affordable products and a place to meet and have coffee, exchange books and access the community computer. This isolated rural community is approximately 10 miles from shopping facilities, public transport is limited and there are no organised youth activities. Our grant of £750 has enabled them to expand the use of the coffee shop to host evening activities, including a young people's cafe and a craft group.

**Puriton Allotment Association** was established by a group of residents following consultations with the community. Its aims are to promote healthy active lifestyles and a village facility that promotes community spirit and inter-generational activities. Our grant of £1,000 provided equipment for improved communal activities.

**Cheddar Valley Plus** was recently set up as a rural food bank and advice service to support residents living in a wide geographical area. Their aim is to reach vulnerable people and families in rural areas who have limited access to transport services. Our grant of £3,000 helped with the initial set-up costs and the provision of a satellite unit, enabling more people to access vital services.

\*Somerset Intelligence (SCC)

\*\* Including grants to organisations supported from the Somerset Flood Relief Fund working in rural flood affected communities.





SPECIAL FEATURE: SOMERSET FLOOD RELIEF FUND

ON JANUARY 7TH, WITH THE ASSISTANCE OF A £50,000 GRANT FROM SOMERSET COUNTY COUNCIL, WE LAUNCHED THE 2014 APPEAL FOR THE SOMERSET EMERGENCY FLOOD RELIEF FUND. AT THAT POINT, THOUGH, NOBODY COULD HAVE PREDICTED THAT WE WOULD HAVE SEEN ONE OF THE LARGEST AND MOST PERSISTENT FLOODS EVER SEEN IN THE UK, OR THE MAGNIFICENT PUBLIC RESPONSE TO THIS CRISIS.

By March 31st, an incredible £1,083,941 had been donated thanks to the overwhelming generosity of thousands of individuals, companies, churches, mosques and trusts throughout the UK and beyond. Our small team was boosted by over 120 hours of volunteer time, particularly by staff from local Tesco supermarkets and our neighbouring Community Foundations. With their support we



Justin speaks on BBC Points West

were able to process thousands of donations swiftly and issue emergency grants, usually within 48 hours of receiving applications.

As the flood waters began to recede at the end of March, we introduced new phases of grants to help people recover their homes and to support local microbusinesses that were most affected. We worked in partnership with the Royal Bath and West Society to help farmers, and we have begun to fund projects that will help rebuild the community, largely with the support of a parallel fund established by the Somerset Freemasons for this purpose.

At the time of writing, many of those who had to leave their homes have yet to return, and we continue to support many people through that process. The fund has grown to over £1.38m,

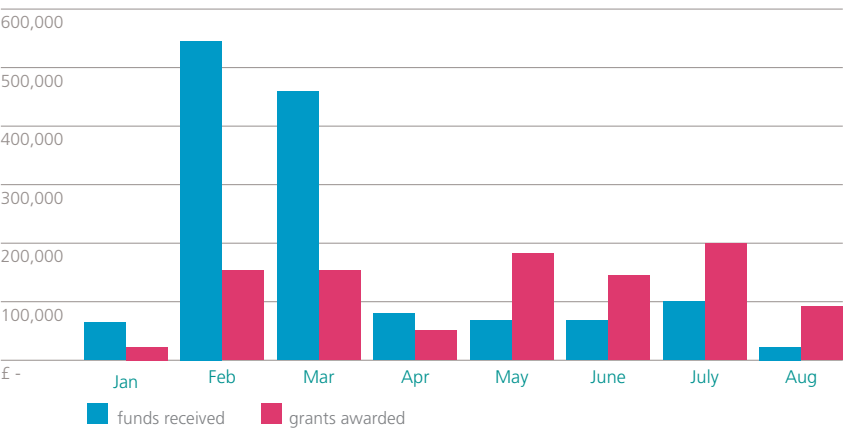


Justin speaks to HRH Prince of Wales on the Levels

of which over £1m has been distributed, and the Foundation will continue helping people back into their homes for as long as it takes.

In early 2015, we will publish an independent assessment of the delivery of our management and administration of the fund which will be available both in hardcopy form from us and through our website.

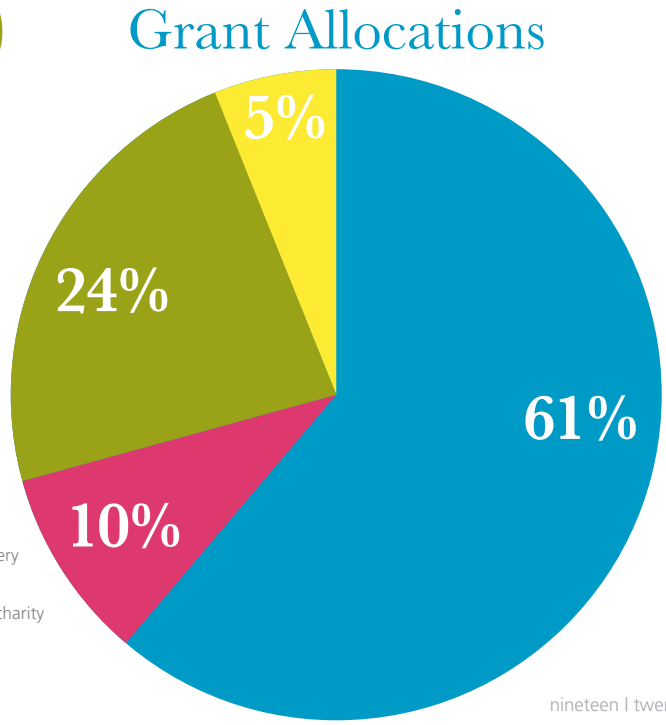
SPECIAL FEATURE: SOMERSET FLOOD RELIEF FUND



47 farm businesses  
53 microbusinesses supported

“The grant will help in the running cost of all the extra fuel and electricity to keep pumps running.”

Resident of North Newton



“Thank you so, so much for all Somerset Community Foundation has done to help me these last few months. This money gives me hope for the future.”

Resident of Moorland

346 flood-affected households

SPECIAL FEATURE: SOMERSET FLOOD RELIEF FUND

NOTHING CAN TAKE AWAY THE DEVASTATION, STRESS, FEAR AND ANGER THAT THE FLOODS HAVE CAUSED, BUT THE SHEER VOLUME OF DONORS WHO HAVE SUPPORTED OUR APPEAL HAS GIVEN A TREMENDOUS MORALE BOOST TO THOSE MOST AFFECTED.

From organ recitals to dog shows, sky dive days to abseiling events, and auctions to art exhibitions, hundreds of community fundraising activities were planned by dozens of dedicated volunteers across the county during 2014. The financial assistance we have been able to offer as a result has helped alleviate much hardship.



David Fothergill and an abseiler at County Hall

“Thanks for your tolerance of us Londoners during Glastonbury Festival week - thinking of you all at the moment and wishing you well.”

+ + + + + + + + + + + + + + +  
Justgiving Donor



The Run for the Levels Dog Show raised over £7,500



Fundraisers from South Somerset prepare for the Edinburgh Marathon

SPECIAL FEATURE: SOMERSET FLOOD RELIEF FUND

THANK YOU

On behalf of the flood-affected communities we thank everyone who donated to our appeal to help those whose lives were devastated by the floods in 2014. Every single person who supported the appeal has made a difference. No matter how much you gave, it has all made a difference.

There is not sufficient space here to begin to thank everyone who donated, but we would like to particularly acknowledge the following who, to date, have supported the appeal with gifts of £10,000 or more:

- |                               |                                  |                            |
|-------------------------------|----------------------------------|----------------------------|
| 38 Degrees                    | Gannett Foundation               | Somerset County Council    |
| Clarks International          | Glastonbury and Wells Lions Club | Somerset Masonic Charities |
| D'Oyly Carte Charitable Trust | Indian Muslim Welfare Society    | Tesco Plc                  |
| EDF Energy                    | NFU Mutual Charitable Trust      | Wren Living                |
| Enterprise Rent-A-Car         | Office for Civil Society         | UK Islamic Mission         |
| Foster Wood Foundation        | Prince of Wales Countryside Fund | WM Morrisons Ltd           |
| Friends Life Company Ltd      | Society for the Unwell and Needy |                            |

We would also like to thank our colleagues at UK Community Foundations, Quartet Community Foundation, and Wiltshire and Swindon Community Foundation for their support. Thanks also to the organising committee at FLAG for promoting the appeal to their thousands of Facebook followers and to the Community Council of Somerset's Village Agents for helping people access our grants.





RAISING ASPIRATIONS

Raising Aspirations, in partnership with Crispin School in Street, was set up in 2011 with the support of Ninesquare Trust. The project pairs a young student at risk of under-achievement with a volunteer mentor from local businesses and the wider community. To date the Foundation has recruited and provided training to 120 local mentors, and over 100 students have benefited from this one-to-one support.

The Raising Aspirations mentoring programme aims to find solutions for young people in Somerset whose attainment in national qualifications lags behind their true potential. In 2013 Somerset was ranked 111 out of 152 local authorities for overall GCSE results, and we are particularly concerned about students from poorer backgrounds whose attainment is, on average, half as good as other pupils.

An independent evaluation by the University of East London shows that the mentoring so far has helped improve young people’s academic aspirations, self-esteem and confidence. The evaluation will report in 2015, and the Foundation will then look at the possibility of extending Raising Aspirations further.

“For me, knowing that my mentee has the support of someone totally independent is probably the biggest thing. They can aspire to things they may be too self-conscious to raise with family and friends. I think the element of making them believe anything is possible and helping to guide them through the process of how they might achieve it is very strong”.

Becky Plant, Raising Aspirations Mentor  
Project Manager, Clarks International

“I can make a difference by giving my mentee a different perspective on life and their future and help them to consider their choices and decisions.”

+ + + + + + + + + + + + + +  
Ali Russell, Raising Aspirations Mentor  
IT Manager, Clarks International



SURVIVING WINTER APPEAL

Winter can be a period of great stress, and many people can become withdrawn and depressed. It can affect people of all ages but particularly the elderly, with many facing the stark choice between heating and eating. Many health problems associated with ageing are exacerbated by cold and damp housing. On average there are around 275 excess winter deaths in Somerset each year, with the majority being older people, and it is estimated that cold housing costs the NHS £1.36bn each year.\*

In rural areas in particular, expensive fuel options combined with solid walled properties that are hard to insulate created real hardship and health problems for too many people. Surviving Winter is a donor-led campaign through which hundreds of people voluntarily donate the equivalent of their Winter Fuel Payment to help older people struggling to afford to heat their homes adequately and maintain a reasonable quality of life during the winter.

During the 2013/14 winter almost £60,000 was donated to the appeal in Somerset. Working with frontline partners, we directly helped over 400 households that were occupied by older people struggling with the financial burden that winter brings, enabling them to keep the heating on, keep active and maintain a social life when they needed it most.

This award-winning programme was devised and developed in Somerset four years ago and has grown to become an annual national appeal, raising over £1m across the UK each year.

\*Age UK

“This will make a great difference to the time we keep our heating on. We are both in our 80s and feel the cold so much.”

+ + + + + + + + + + + +  
Grant recipient



working in  
partnership





# inspiring philanthropy

## PHILANTHROPY FELLOWSHIP

PART OF OUR ROLE IN SOMERSET IS TO ENRICH THE EXPERIENCE OF PEOPLE WHO SO GENEROUSLY SUPPORT OUR COUNTY. THAT IS WHY WE ARE PART OF THE PHILANTHROPY FELLOWSHIP SOUTH WEST WHICH IS BUILDING A NEW NETWORK OF COMMUNITY PHILANTHROPISTS.



The aim is to bring together and support people who:

- have purpose and passion and want to make a meaningful contribution by giving their skills, time and financial resources
- want to connect to their communities and address some of the most pressing social needs
- want to share, learn and experience how to be effective, lifetime philanthropists
- want to achieve measurable results and impact from their giving
- have a desire to create communities of lifelong, informed and inspired philanthropists

Through events, seminars, forums and community visits Fellows can learn and experience how to be effective, lifetime philanthropists able to achieve measurable results and impact from their giving.

As part of this programme, we invited Lord Wei of Shoreditch, a founding partner of the Shaftesbury Partnership and Teach First, to deliver a key note speech at our Annual Celebration at Pennard House in East Pennard last year.

We also hosted a series of Below the Radar meetings, enabling donors and community leaders to meet, share insights and form new relationships.

If you would like to find out more about the Philanthropy Fellowship, please contact Justin Sargent or visit <http://philanthropyfellowship.org.uk/southwest>

## WORKING WITH PROFESSIONAL ADVISORS

MAKING A DONATION OR LEAVING A LEGACY TO A CHARITABLE CAUSE IS ALWAYS A VERY SPECIAL AND PERSONAL DECISION. FOR MANY PEOPLE THE OPPORTUNITY TO MAKE A DIFFERENCE TO THE LIVES OF PEOPLE IN THEIR COMMUNITY CAN MEAN SO MUCH MORE, BUT IT CAN BE DIFFICULT TO KNOW WHERE TO START.

Professional advisors can often find themselves discussing a client's plans but usually have limited knowledge of local charities and causes that match their clients' wishes.

By working with professional advisors over the past few years, we have been able to give their clients the opportunity to create charitable funds that are professionally managed, reach local causes and make a difference in the communities they care most about. By working with professional advisors we have:

- created new charitable funds tax-efficiently through donations of shares
- established 'memorial funds' through legacies
- recovered and enhanced dormant and ineffective charitable trusts

By working together, professional advisors and Somerset Community Foundation can help a client fulfil their wishes and make a lasting difference in Somerset.

"When one of my clients wished to establish a significant charitable fund through a donation of shares, Somerset Community Foundation offered the ideal solution. By establishing a named fund within the Foundation, my client was able to support her chosen sectors of the community in a simple, effective and highly tax-efficient way."

**Jane Wheeler FIFP CFP CM Chartered Financial Planner, Paradigm Norton Financial Planning Ltd.**

By working with Somerset Community Foundation, one of Clarke Willmott's clients was able to create a legacy for her local community as part of a wider portfolio of giving when she made her will. Sadly, the donor passed away earlier this year, but she has left a lasting impact which will support her community in perpetuity, as we create a new endowment in her name.



of our Endowment Fund  
was created through  
referrals from local  
professional advisors  
since 2007





FUNDS

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, trusts and companies.

|                                      |                                      |                                    |
|--------------------------------------|--------------------------------------|------------------------------------|
| Angela Yeoman Fund                   | Hector Tanner Memorial Fund          | Shoon Fund                         |
| Beacon Fund*                         | Hydrex Fund                          | Sir John Wills Memorial Fund       |
| C & JP Fund*                         | John and Celia Bonham Christie Trust | Somerset Flood Relief Fund         |
| Christopher and Heather Virgin Fund* | John and Dorothy Ball Fund           | Somerset Fund for the Deaf*        |
| Christopher Tanner Memorial Trust    | King James Exhibition Trust          | Somerset Giving Fund               |
| Churchstanton Community Fund*        | Long Sutton House Fund               | Somerset Grassroots Grants Fund    |
| Clarke Willmott Fund*                | McGreevy Charitable Trust Fund       | Somerset Guardians                 |
| Comic Relief                         | Medlock Fund*                        | Somerset Masonic Fund              |
| Courage Family Fund                  | Mendip Hills Fund                    | Somerset Masonic Flood Relief Fund |
| David Price Fund*                    | Millenium Fund*                      | Somerset Restorative Justice Fund  |
| Donald Lake Memorial                 | Myakka Fund*                         | Somerset Smoke Free Fund           |
| Grassroots Grants                    | Norah Cooke Hurle Fund               | Somerset Youth Fund                |
| Eagle House Trust                    | Party Packs Fund                     | Summerfield and Tauntfield Fund    |
| Exmoor Community Trust*              | Perry's Recycling                    | Surviving Winter Fund              |
| Field House Trust                    | Peter Wyman Fund                     | TS5C Healthy Living Fund           |
| Framptons Transport Community Fund   | Philip Gibbs Fund                    | WCS Pickford Trust                 |
| Glemsford Fund*                      | Pilkington Fund                      | West Somerset Relief Fund          |
| Grave Family Fund                    | Rural Fund                           | Yeovil Town FC Fund                |

\* Supported by Community First Match Funding

If you would like to find out about setting up a fund or benefiting from the Community First Endowment Match Funding scheme, please contact Justin Sargent on 01749 344949 or [justin.sargent@somersetcf.org.uk](mailto:justin.sargent@somersetcf.org.uk)



## THANK YOU...

2013/14 has been an extraordinary year for Somerset Community Foundation, and we are exceptionally grateful to everyone who supported our work during the year. Every pound donated has made a difference, enabling us to continue our mission to build stronger communities, tackle disadvantage and transform people's lives.

We have thanked the supporters of the [Somerset Flood Relief Fund](#) on page 22, and on this page we would like to thank everyone else who has helped sustain and grow the underlying work of the Foundation. We are particularly grateful to Jane Wheeler of [Paradigm Norton](#), the staff at [Anesco](#) and the trustees of [Exmoor Community Trust](#) for their assistance in the establishment of three new endowment funds, and for the new partnerships we have formed with [Churchstanton Parish Council](#) and the [Mendip AONB](#) team.

We have also continued our partnerships with the [Ninesquare Trust](#) and [Crispin School](#) in the delivery of the Raising Aspirations programme, and we pay tribute to the 120 volunteer mentors who are helping to bring the best out in the students they support. We extend our thanks to our volunteers, [Jacky Elliot](#), [Angharad Jones](#) and [Stella Zingas](#), who provided us with essential administrative support and the volunteers who helped with grant awards and monitoring visits.

Our Surviving Winter programme was again generously supported by over 250 donors and distributed by our partners across Somerset, reaching vulnerable pensioners to help them stay warm and active through the cold weather. Many thanks to: [Age UK Somerset](#), [Community Council for Somerset](#), [Forum 21](#), [Knightstone Housing Association](#), [Mendip Citizens Advice Bureau](#), [Mendip Community Credit Union](#), [Rotary Club of Frome Selwood](#), [Taunton Citizens Advice Bureau](#), [Wincanton Live at Home](#) and [Yarlington Housing Group](#).

We would like to thank the Somerset Business Guardians, local businesses that provide vital grant-making funding, sponsorship for our events and support for the day-to-day work of the Foundation: [Butler Tanner and Dennis](#), [Clarks](#), [Golledge Electronics Ltd](#), [Gooch and Housego](#), [Heidi Burton Photography](#), [Kilver Court Designer Village](#), [Langdons](#), [M5 Glass](#), [Mercer Design](#), [Myakka](#), [Old Mill Accountants](#), [Pennard House](#), [Perrys Recycling](#), [Quilter Cheviot](#), [Smith & Williamson](#), [Somerset Life](#), [Strangers with Coffee](#), [Summer Set Associates](#), [Sweet Cumin](#), and [Western Daily Press](#).

Our ability to grow and increase our support for our communities, develop new programmes and respond to local needs depends on unrestricted gifts. In this respect our [Friends and Ambassadors](#), local companies and numerous trusts all make vital financial and in-kind contributions that ultimately makes a lasting difference to those most in need across our county.

Finally, we would like to thank and pay tribute to the people who run and volunteer for the local charities, community groups and social enterprises that make Somerset such a special place to live. You are amazing and it is our special privilege to be able to help you make Somerset better place to live...for everyone.

# changing people's lives





## LOOKING AHEAD

WE CONTINUE TO DEVELOP NEW PROGRAMMES IN PARTNERSHIP WITH DONORS COMMITTED TO BUILDING VIBRANT AND SUPPORTIVE COMMUNITIES IN SOMERSET. DURING 2014/15 AND BEYOND, THESE PROGRAMMES INCLUDE:

### SOMERSET SOCIAL ENTERPRISE FUND

With the support of Somerset County Council, we will be launching a £1m fund specifically designed to encourage and support local social enterprises through a loans programme. Social enterprises offer new and sustainable ways of tackling some of the most pressing needs in our communities, and we hope to encourage their expansion and growth throughout Somerset.

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### SOMERSET YOUTH FUND

Established in early 2014, the Somerset Youth Fund supports innovative and effective solutions to issues faced by the most disadvantaged young people in Somerset today. By providing a sustainable source of support for the voluntary organisations that have a vitally important role to play in raising the aspirations of these young people, charity staff can focus more of their time and energy on delivering services and less on fundraising. The Foundation is committed to building a broad network of local companies interested to invest in the next generation by regularly contributing to the Somerset Youth Fund.

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### GEOGRAPHICAL FUNDS

During 2013/14 we have established three new funds for specific areas of Somerset: Mendip Hills, Exmoor and Churchstanton. Although each fund has been initiated by local funders, we will be encouraging people in these areas to contribute to these funds with donations, fundraising activities and legacies.



Summary Financial Statement for the year ended 31 March 2014

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE)  
STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2014

|  | Unrestricted Funds<br>(£) | Restricted Funds<br>(£) | Endowment Funds<br>(£) | Total 2014<br>(£) | Total 2013<br>(£) |
|--|---------------------------|-------------------------|------------------------|-------------------|-------------------|
| INCOMING RESOURCES   |                           |                         |                        |                   |                   |
| Incoming Resources from Generated Funds                                    |                           |                         |                        |                   |                   |
| - Voluntary Income   | 104,058                   | 1,258,801               | 356,869                | 1,719,728         | 546,541           |
| Incoming Resources from Charitable Activities                              | -                         | 121,131                 | 178,052                | 299,183           | 225,286           |
| Activities for Generating Funds  |                           |                         |                        |                   |                   |
| - Fundraising  | 7,119                     | -                       | -                      | 7,119             | 10,703            |
| Investment Income  | 571                       | 113,631                 | -                      | 114,202           | 94,855            |
| <b>Total Incoming Resources</b>  | <b>111,748</b>            | <b>1,493,563</b>        | <b>534,921</b>         | <b>2,140,232</b>  | <b>877,385</b>    |
| RESOURCES EXPENDED   |                           |                         |                        |                   |                   |
| Costs of Generating Income   | 83,693                    | 75,354                  | 12,946                 | 171,993           | 83,102            |
| Charitable Activities  | 62,499                    | 624,988                 | -                      | 687,487           | 563,576           |
| Governance Costs   | 13,152                    | -                       | -                      | 13,152            | 14,011            |
| <b>Total Resources Expended</b>  | <b>159,344</b>            | <b>700,342</b>          | <b>12,946</b>          | <b>872,632</b>    | <b>660,689</b>    |
| <b>NET (OUTGOING)/INCOMING RESOURCES<br/>FOR THE YEAR BEFORE TRANSFERS</b> |                           |                         |                        |                   |                   |
|  | (47,596)                  | 793,221                 | 521,975                | 1,267,600         | 216,696           |
| Transfers  | 55,419                    | (6,896)                 | (48,523)               | -                 | -                 |
| <b>NET INCOMING RESOURCES BEFORE<br/>OTHER RECOGNISED GAINS AND LOSSES</b> |                           |                         |                        |                   |                   |
|  | <b>7,823</b>              | <b>786,325</b>          | <b>473,452</b>         | <b>1,267,600</b>  | <b>216,696</b>    |
| Realised Gains   | -                         | -                       | 45,262                 | 45,262            | 22,498            |
| Unrealised Gains / (Losses)  | (5,688)                   | -                       | (20,828)               | (26,516)          | 274,605           |
| <b>NET MOVEMENT IN FUNDS FOR THE YEAR</b>                                  | <b>2,135</b>              | <b>786,325</b>          | <b>497,886</b>         | <b>1,286,346</b>  | <b>513,799</b>    |
| BALANCE AT 1 APRIL 2013  | 181,134                   | 384,331                 | 3,163,812              | 3,729,277         | 3,215,478         |
| <b>BALANCE AT 31 MARCH 2014</b>  | <b>183,269</b>            | <b>1,170,656</b>        | <b>3,661,698</b>       | <b>5,015,623</b>  | <b>3,729,277</b>  |

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE)  
Balance Sheet as at 31 March 2014

|   | 31 March<br>2014<br>(£) | 31 March<br>2013<br>(£) |
|---|-------------------------|-------------------------|
| FIXED ASSETS                                      |                         |                         |
| Investments                                       | 3,817,573               | 3,260,010               |
| Tangible Fixed Assets                             | 129,941                 | 137,600                 |
|   | <b>3,947,514</b>        | <b>3,397,610</b>        |
| CURRENT ASSETS                                    |                         |                         |
| Debtors   | 162,392                 | 96,958                  |
| Bank  | 953,076                 | 303,976                 |
|   | <b>1,115,468</b>        | <b>400,934</b>          |
| CREDITORS: AMOUNTS FALLING<br>DUE WITHIN ONE YEAR |                         |                         |
|   | (47,359)                | (69,267)                |
| NET CURRENT ASSETS                                | <b>1,068,109</b>        | <b>331,667</b>          |
| NET ASSETS  | <b>5,015,623</b>        | <b>3,729,277</b>        |
| FUNDS   |                         |                         |
| Unrestricted Fund                                 | 135,378                 | 132,662                 |
| Designated Funds                                  | 47,891                  | 48,472                  |
| Restricted Funds                                  | 1,170,656               | 384,331                 |
| Expendable Endowment Fund                         | 3,661,698               | 3,163,812               |
| <b>TOTAL FUNDS</b>                                | <b>5,015,623</b>        | <b>3,729,277</b>        |

TRUSTEES STATEMENT  
The auditor has issued unqualified reports on the full annual financial statements and on the consistency of the trustees' report with those financial statements. Their report on the full annual financial statements contained no statements under sections 498(2)(a), 498(2)(b) or 498(3) of the Companies Act 2006. Approved by the board of trustees – Peter Wyman CBE, Paul Hake – 29 September 2014

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE)  
The summary financial statement is a summary of information taken from the full statutory financial statements for the year ended 31 March 2014. The auditor's 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 the annual report of the trustees, should be consulted. Copies of these can be obtained from Somerset Community Foundation, Yeoman House, The Showground, Shepton Mallet, Somerset BA4 6QN.

Independent Auditor's Statement to the members of Somerset Community Foundation  
We have examined the summary financial statement for the year ended 31 March 2014 set out above.

Respective responsibilities of the trustees and the auditor  
The trustees are responsible for preparing the Annual Report and summary financial statement in accordance with applicable United Kingdom law.

Our responsibility is to report to you our opinion on the consistency of the summary financial statement, issued with the Annual Report, with the full annual financial statements and the Annual Report of the Trustees and its compliance with the relevant requirements of section 427 of the Companies Act 2006 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 conducted our work in accordance with Bulletin 2008/3 issued by the Auditing Practices Board. Our report on the company's full annual financial statements describes the basis of our audit opinion on those financial statements and on the Annual Report of the Trustees.

Opinion  
In our opinion the summary financial statement is consistent with the full annual financial statements and Annual Report of the Trustees of Somerset Community Foundation for the year ended 31 March 2014 and complies with the applicable requirements of section 427 of the Companies Act 2006, and the regulations made thereunder.

Tim Lerwill (Senior Statutory Auditor)  
For and on behalf of Old Mill Audit LLP  
Chartered Accountants and Statutory Auditor, Bishopbrook House, Cathedral Avenue, Wells, Somerset, BA5 1FD  
1 October 2014



# SOMERSET COMMUNITY FOUNDATION

## President

Lady Gass, Lord Lieutenant of Somerset

## Vice-Presidents

Lord Cameron of Dillington \* Richard Case CBE DL \* John Edney \*  
Michael Fiennes \* David Fothergill (Chairman, Somerset County  
Council) \* Rt Revd Peter Hancock, Bishop of Bath and Wells \* Richard  
Lloyd (The High Sheriff of Somerset) \* Brigadier Hugh Pye OBE, LL.D, FRSA  
\* Maureen Whitmore \* Angela Yeoman OBE DL

## Chairman

Peter Wyman CBE

## Trustees

Dr John Bowman CBE\* \* Charles Clark\* \* Paul Hake \* David Jenkins  
\* Martin Kitchen \* Jane Lock \* Sarah Lomas \* Andy Palmer \* Karen  
Pearson \* Jan Ross \* Stuart Thorne

\*Many thanks to these trustees who are retiring in October 2014

## Staff

Chief Executive Justin Sargent

Deputy Chief Executive Mary Hancock

Senior Programmes Manager Tessa Hibbert

Programmes Manager Jocelyn Blacker

Programmes Officer Karen Collins

Marketing & Events Executive Sue Wheeler

Administrator Kathryn Perkins

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Somerset-Community-Foundation



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## Somerset Community Foundation

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Registered in England and Wales No. 04530979

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