



somerset  
COMMUNITY | FOUNDATION



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# Annual Report 2016/17



# Contents

**01**

Financial Headlines

**02**

Message from our  
Chairman and CEO

**04**

Our Vision, Mission &  
Theory of Change

**06**

List of Funds supporting  
our community investment  
in 2016/17

**07**

Leadership

**08**

Grants made to organisations  
during 2017/17

**12**

The impact of our funding  
on our local voluntary sector

**14**

The impact of our funding  
on individuals



**16**

Focus on...Advancing  
people's mental and physical  
health

**18**

Focus on...Reduction of  
isolation and disadvantage

**20**

Focus on...Improving  
life skills, education and  
employability

**22**



**22**

Focus on...Creating stronger  
communities

**24**

Focus on...Connecting  
people with arts, culture,  
heritage and environment

**26**

Raising Aspirations

**27**



**27**

Surviving Winter

**28**

Working in Partnership

**29**

Celebrating our  
15th Anniversary

# Financial Headlines 2016/17\*

Total expenditure  
**£1,043,865**

**12**  
New funds  
created

Total income  
**£1,243,496**

**£2,400**  
Average grant to  
organisations



For every  
pound spent on  
generating funds  
over the past five  
years, £12.75 has  
been raised

Over the  
last 12 months  
we supported  
208 organisations  
and 46 individuals



\* Please visit [www.somersetcf.org.uk/about-us/publications](http://www.somersetcf.org.uk/about-us/publications)  
to download our full accounts and Trustees' Report 2016/17.

**£71,000**  
Invested from the  
Somerset Social  
Enterprise Fund

Final grants worth  
**£31,035**  
awarded from the  
2014 Somerset Flood  
Relief Fund

**£516,234**  
Awarded to  
208 voluntary sector  
organisations from  
our regular  
programmes

**£5,050,237**  
Value of the  
endowment fund  
(as at 31st March 2017)

**£279,203**  
Added to our  
endowment fund





# Message from our Chairman and CEO



“

We do more than just provide funding. Last year we also gave advice and other support to almost half the organisations we funded.

*Jane.*

**JANE BARRIE OBE DL**  
**CHAIRMAN**

Local charities, voluntary groups and social enterprises working at the heart of our communities are more important than ever and we can no longer take the essential and unique role they play in our society for granted.

Somerset Community Foundation is one of the largest independent funders of these local groups and we see this more keenly than most. We see how the local Voluntary, Community and Social Enterprise (VCSE) organisations in which we invest funds and time, provide preventative services, help people through recovery, and create vibrant communities from which we all benefit. They unlock and mobilise assets within our communities, using them as a force for good.

However, it is a time of great uncertainty for the VCSE sector. Falling income – particularly from the public sector – and rising demand for services threatens the viability of many organisations. It is an important time for Somerset Community Foundation to help local organisations rise to these challenges.

For the first time, we present our Theory of Change (page 4-5), explaining the way we are helping the local VCSE sector become more effective and sustainable. We do this through 'community investment' and particularly through small grants to local organisations. We awarded grants worth over £500,000 to 208 organisations during 2016/17. Most of these awards go to support local projects run by local people responding to the needs and opportunities in their community. In addition, we invested a further £71,000 from the Somerset Social Enterprise Fund to help organisations make a difference in



**JUSTIN SARGENT**  
CHIEF EXECUTIVE

“

**...we know that our ability to serve the communities rests on our ability to both inspire and deliver philanthropy.**



more financially sustainable ways.

We do more than just provide funding. Last year we also gave advice and other support to almost half the organisations we funded. We are increasingly recognised as a leader in the sector and are ideally placed to bring VCSE organisations with common interests together and with the public and corporate sectors, sharing knowledge and insights, and finding new opportunities for collaboration.

Looking ahead, we are working hard to do even more to make a difference. While we continue to invest in the core services and projects delivered by local VCSE organisations, we will be making a specific effort to increase the support we give to community-led initiatives in our most deprived communities, and we will be investing more in the capacity and capability of larger organisations working in Somerset.

The most effective way we can increase our impact is by growing Somerset Community Foundation, particularly by inspiring more philanthropy for Somerset and increasing our endowment so that Somerset has a fund that can respond to the changing needs of future generations.

During 2016/17 we received our largest single donation from an individual which helped our endowment grow to over £5 million for the first time. While this gives us a solid foundation, we remain one of the UK's smallest Community Foundations and we are determined to change that.

At the end of 2016/17 we started to prepare for two major new initiatives which we are pleased to report have now commenced. Firstly, we have started to work on the Hinkley Point C Community Fund, which has been set up to mitigate impacts from the construction of the new power station by supporting community

well-being and quality of life. Secondly, we have secured new funding from Access – The Foundation for Social Investment, which has helped us diversify our social investment programme.

Both initiatives represent a recognition of the vitally important role Somerset Community Foundation has in Somerset, but we know that our ability to serve the communities rests on our ability to both inspire and deliver philanthropy.

As we look forward to the fantastic opportunities that lie ahead in 2018 and beyond we would like to thank our trustees, staff and volunteers; our donors and partners; and the VCSE organisations that we are so proud to support, for sharing our commitment and passion for the people of Somerset over the past year.

# Our Vision, Mission & Theory of Change

Our **vision** for Somerset is a county of vibrant, inclusive communities where voluntary organisations and social enterprises thrive, transforming and enhancing the lives of the most disadvantaged people.

Our **mission** is to be the catalyst for inspirational philanthropy, providing a simpler and more effective way for donors to make a lasting difference in Somerset through community investment and leadership.

## RESOURCES



## ACTIVITY



In 2015, we introduced our **Theory of Change**, which maps out our strategy and related activities for realising our vision for Somerset.

## INTERMEDIATE IMPACT

## LONG-TERM IMPACT



\* VCSE stands for Voluntary, Community and Social Enterprise Sector.

# List of Funds supporting our community investment in 2016/17

## A&H Fund

Angela Yeoman Fund

## Anne Dodgson Memorial Fund

Artlife

## Back on Track

Beacon Fund

## Benchmark

Burnham & Berrow Golf Captain's Fund

## C & J P Fund

Christopher and Heather Virgin Fund

## Christoper Tanner Memorial Trust

Churchstanton Community Fund

## Clarke Willmott Fund

Comic Relief

## Courage Family Fund

Creative Somerset

## Crowcombe Chest

David Price Fund

## Deane Dragons Legacy Fund

Donald Lake Memorial

## Eagle House Trust

Elliot's Touch

## Exmoor Community Trust Fund

Field House Trust

## Framptons Transport Community Fund

Glemsford Fund

## Grave Family Fund

Growing Futures (McPhail Trust) Fund

## Hector Tanner Memorial Fund

Hidden Needs Trust

## Hinton St George Community Fund

HPC Community Fund\*

## Huish's Exhibition Fund

Hydrex Fund

## John and Celia Bonham Christie Trust

John and Dorothy Ball Fund

## King James Exhibition Trust

Lucy Nelson Fund

## Mary's Beat\*

McGreevy Charitable Trust Fund

## Medlock Fund

Mendip Hills Fund

## Michael Samuel Charitable Trust Fund

Millennium Fund

## Myakka Fund

Norah Cooke-Hurle Trust

## Oake Sunshine Fund

Party Packs Fund

## Perrys Recycling Fund

Peter Wyman Fund

## Philip Gibbs Fund

Pilkington Fund

## Ringham Fund

Rural Fund

## Shoon Fund

Sir John Wills Memorial Fund

## Smith & Williamson Investment Management Fund\*

Solutions for an Ageing Society (UnLtd)

## Somerset Crimebeat Trust

Somerset Disaster Recovery Fund

## Somerset Flood Relief Fund

Somerset Fund for the Deaf and Hard of Hearing

## Somerset Giving Fund

Somerset Grassroots Grants Fund

## Somerset Lord Lieutenant's Fund for Youth

Somerset Masonic Fund

## Somerset Masonic Flood Recovery Fund

Somerset Restorative Justice Fund

## Somerset SmokeFree Fund

Somerset Social Enterprise Fund

## Somerset Youth Fund

Summerfield and Tauntonfield Fund

## Surviving Winter Fund

Taunton Deane Borough Council Defibrillator Fund\*

## Taunton Deane Borough Council Small Grants Fund

Timbuktu Challenge

## T & PJ (Milborne Port) Fund

TSSC Healthy Living Fund

## TYCC Fund

WCS Pickford Trust

## West Somerset Relief Fund

West Somerset Youth Trust

## Yeovil Town FC Fund

Youth Social Action Fund

\*Set up after 31 March 2017



# Leadership

Our unique role as a cause-neutral and independent charity means we are well placed within Somerset to provide a leadership role in our county. We do this through connecting people with common interests, and also by sharing knowledge, intelligence and insights with others.

For example, our **Vital Signs** report, which we published in 2016, is used as a tool to inform people about the way they can make a difference through their giving in Somerset, and is also used by charities to support their fundraising efforts.

With backing from Somerset County Council and the NHS, we also host the **VCSE Strategic Co-ordination Project** which brings the public sector closer to VCSE organisations around priority issues. Through this initiative we organised a one day leadership conference on the topic of 'Innovation and Leadership' which was attended by over 50 organisations with guest speakers from the Open University and NPC.

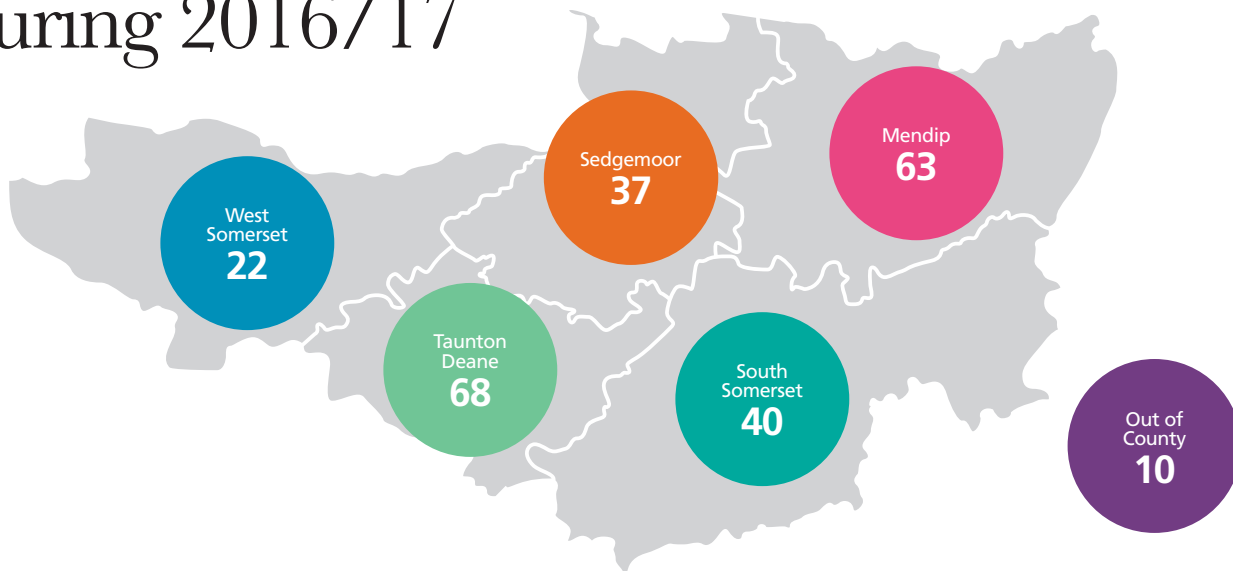
“

Really useful to take time out to think strategically. Working in a small organisation, it was nice to hear about other people's experiences and give time for development and innovative thoughts.

CONFERENCE DELEGATE



# Grants made to organisations during 2016/17



| Mendip grant applicants                                   | Amount  | Description   |
|---|---------|---|
| Active and In Touch                                       | £2,500  | Reconnecting isolated older people to their community                           |
| Ashwick and Oakhill Playgroup                             | £500    | Replacement of equipment for play activities                                    |
| Autism Community Network CIC – Autism Somerset (ACNCIC)   | £3,950  | Education & Training for the Community  |
| Avalon Archery Club                                       | £500    | Smokefree policy for Avalon Archery Club  |
| Back on Track   | £5,000  | Horse riding for children with additional needs                                 |
| Back on Track   | £1,500  | Therapeutic horse riding sessions   |
| Blandford Opportunity Group                               | £3,850  | Additional sessions for sessions for children with speech and language problems |
| Burnham & Highbridge Sea Cadet Unit                       | £400    | Renovation to create new classrooms   |
| Charterhouse Exoplanet Project                            | £200    | Astronomy education and outreach  |
| Cheddar Valley Plus                                       | £3,897  | Support costs for the delivery of core activities                               |
| Children's World  | £2,500  | Support costs for the delivery of core activities                               |
| Children's World  | £1,000  | Off the Streets 2017  |
| Children's World  | £500    | Off the Streets 2016  |
| Citizens Advice Mendip                                    | £4,750  | Small grants to help older people stay warm in winter (Surviving Winter)        |
| Coleford Revival Group                                    | £500    | Christmas meal for isolated, older people                                       |
| Community Archaeology on the Mendip Plateau (CAMP)        | £1,000  | Portable Archaeology Exhibition 2017  |
| Community Catalysts                                       | £10,000 | Community Micro Enterprise Project  |
| Divoky Riding School                                      | £500    | Smokefree policy for Divoky Riding School                                       |
| Dorchester Opportunity Group                              | £3,850  | Support costs for the delivery of core activities                               |
| Edventure Frome Community Interest Company                | £5,000  | Woodworking sessions for young refugees   |
| Elim Connect Centre                                       | £335    | Community hub in Wells  |
| Evercreech Friendship Club                                | £150    | Community Christmas lunch   |
| FastRacket (part of Shepton Mallet Bowls and Tennis Club) | £1,000  | Fast Racket Coaching  |
| Heads Up  | £2,285  | Memories Garden   |
| Jack in the Box Toy Library                               | £1,950  | Play schemes for children in Frome  |
| Jubilee Hall, Ditchat                                     | £1,100  | Village hall improvements   |
| Key4Life  | £3,000  | Prison rehabilitation programme   |
| Leigh On Mendip Recreation Field Management               | £1,500  | Pump track  |
| Leigh on Mendip with Downhead PCC                         | £3,500  | Development of a community Friendship Cafe                                      |
| Mendip Caving Group                                       | £750    | Drying room and Tackle Store  |
| Mendip Community Credit Union                             | £1,525  | Small grants to help older people stay warm in winter (Surviving Winter)        |
| Mendip Society  | £900    | Tania's Wood Revival  |
| Mendip YMCA   | £5,000  | Routes drop-in centre in Frome  |
| Mendip YMCA   | £2,200  | Extra worker for youth clubs  |
| Mendip YMCA   | £1,000  | Music and digital equipment for youth clubs in Yeovil                           |
| Openstorytellers Ltd                                      | £2,000  | Development and marketing of training materials                                 |
| PACE (Personal Achievements Creative Experiences)         | £2,500  | Activities coordinator for adults with disabilities                             |
| Parochial Church Council of Ditchat                       | £750    | Renovation of church rooms for village use                                      |
| Peers for creative outlets                                | £450    | Peer support group for adults with mental health problems in Glastonbury        |
| PROMISEworks  | £4,000  | Start-up costs for mentoring service  |
| PROMISEworks  | £10,965 | Mentoring sessions for young people   |
| Red Brick Building  | £3,900  | Set up of therapeutic gardening service in Glastonbury                          |

continued

|   |               |   |
|---|---------------|---|
| Rotary Club of Frome Selwood              | <b>£3,150</b> | Small grants to help older people stay warm in winter (Surviving Winter)    |
| Royal Holloway University of London       | <b>£1,000</b> | Exploration of previously unexplored cave on the Mendips                    |
| Shepton Mallet parkrun                    | <b>£2,250</b> | Set up costs for Parkrun event in Shepton Mallet                            |
| Somerset Rural Youth Project              | <b>£3,000</b> | Support for young people with additional needs to participate in NCS        |
| Stoke St Michael Community Events Group   | <b>£1,142</b> | Stoke St Michael Festivals  |
| SWEDA                                     | <b>£5,000</b> | Support costs for the delivery of core activities                           |
| SWEDA                                     | <b>£2,500</b> | New kitchen   |
| The Dorothy House Foundation Ltd          | <b>£5,000</b> | Hospice at Home service   |
| The Glastonbury Community Christmas Lunch | <b>£400</b>   | Community Christmas lunch   |
| Tor Netball Club                          | <b>£500</b>   | Smokefree policy for Tor Netball Club                                       |
| TS5C                                      | <b>£2,074</b> | Small grants to young aspiring athletes                                     |
| Wanstrow Village Hall                     | <b>£383</b>   | Upgrades to Facilities  |
| We Hear You                               | <b>£3,729</b> | Counselling for people affected by cancer or other life-threatening illness |
| Wells and Mendip Astronomers              | <b>£150</b>   | Space Art exhibition  |
| Wells Art Contemporary                    | <b>£134</b>   | Soup grant  |
| Wells Food Network                        | <b>£1,500</b> | Start up costs for a new food network                                       |
| Wells Vineyard                            | <b>£201</b>   | Soup Grant  |
| Westbury Sub Mendip Parish Council        | <b>£1,280</b> | Railway canopy refurbishment  |
| Yeast Scrapstore Ltd                      | <b>£700</b>   | Holiday club  |
| Young People Frome                        | <b>£1,470</b> | Children's festival activities programme                                    |
| Young People Frome                        | <b>£500</b>   | Children's festival activities programme                                    |

| <b>Sedgemoor Grant applicants</b>                   | <b>Amount</b>  | <b>Description</b>   |
|---|----------------|--|
| Age UK Somerset                                     | <b>£11,000</b> | Small grants to help older people stay warm in winter (Surviving Winter) |
| Ashcott Village Hall                                | <b>£1,000</b>  | Hall lighting needs upgrading  |
| Axbridge Saxon Junior Football Club                 | <b>£500</b>    | Smokefree policy Axbridge Saxon Junior Football Club                     |
| Brainwave   | <b>£100</b>    | Milestone appeal   |
| Bridgwater Carnival                                 | <b>£1,000</b>  | Event sponsorship  |
| Bridgwater Half Marathon                            | <b>£400</b>    | Sponsorship of half marathan   |
| Bridgwater Half Marathon                            | <b>£100</b>    | Bridgwater Half Marathon – 3 September 2017                              |
| Bridgwater-La Ciotat Link Society                   | <b>£225</b>    | Diamond Jubilee year exchange visit transport costs                      |
| Burnham & Berrow Golf Club                          | <b>£1,380</b>  | Golf coaching sessions for disadvantaged young people                    |
| Burnham United Junior Football Club                 | <b>£500</b>    | Smokefree policy for Burnham United Junior Football Club                 |
| Burtle Village Hall                                 | <b>£450</b>    | Grumpy Old Mens' Breakfast Club  |
| Cheddar Challenger                                  | <b>£500</b>    | New community newsletter   |
| Chilton Trinity Parochial Council                   | <b>£250</b>    | Village hall improvements  |
| Community Council for Somerset                      | <b>£11,000</b> | Small grants to help older people stay warm in winter (Surviving Winter) |
| FOBSA (Brymore Academy PTA)                         | <b>£400</b>    | PE Equipment   |
| Forget-Me-Not Nursery                               | <b>£500</b>    | Climbing frame   |
| Highbridge & Burnham-On-Sea Carnival Ltd            | <b>£250</b>    | Sponsored event  |
| Hill House Christian Centre                         | <b>£500</b>    | Towards team building activities   |
| Homestart Bridgwater                                | <b>£3,000</b>  | Supporting vulnerable young families                                     |
| In Charley's Memory                                 | <b>£1,000</b>  | Therapeutic trips to the Mendip Hills                                    |
| Kyo Kai Judo Club                                   | <b>£100</b>    | General fundraising appeal   |
| Lower Lakes CIO                                     | <b>£1,321</b>  | You Don't Know Until You Try   |
| Mark Day Centre                                     | <b>£100</b>    | Community Christmas lunch  |
| Mean Feet Dance Ltd                                 | <b>£1,525</b>  | Dance sessions for adults with mental ill-health                         |
| Over Stowey Village Hall And Recreation Ground      | <b>£500</b>    | New play equipment   |
| Revitalise Respite Holidays                         | <b>£1,416</b>  | Respite breaks for people with disabilities and their carers             |
| Spaxton Junior Football Club                        | <b>£500</b>    | Smokefree policy for Spaxton Junior Football Club                        |
| St Francis Social Club for visually impaired people | <b>£500</b>    | Social activities for the visually impaired                              |
| St Francis Youth Club                               | <b>£2,500</b>  | Youth clubs and trips for children and young people in Bridgwater        |
| Stawell & Sutton Mallet Village Hall                | <b>£250</b>    | Community Christmas activities   |
| The Bridgwater Snap Group                           | <b>£1,500</b>  | Holiday abroad for families with a disabled child                        |
| The Bridgwater Snap Group                           | <b>£500</b>    | Holiday abroad for families with a disabled child                        |
| Wedmore Mini Day Centre                             | <b>£150</b>    | Community Christmas dinner   |
| Wembdon VC School PTA                               | <b>£50</b>     | General fundraising for Wembdon St George's School                       |
| Westfield United Reformed Church                    | <b>£3,762</b>  | Secure access system for community building                              |
| Westonzoyland PCC                                   | <b>£250</b>    | Community coffee shop  |
| Willowdown Primary Academy PTFA                     | <b>£100</b>    | Raffle prizes  |

| <b>South Somerset grant applicant</b>   | <b>Amount</b> | <b>Description</b>   |
|---|---------------|--|
| Ashill Village Hall Committee           | <b>£500</b>   | Village hall improvements  |
| Care and Share Time                     | <b>£650</b>   | Support group for older people   |
| Citizens Advice Bureau – South Somerset | <b>£8,625</b> | Small grants to help older people stay warm in winter (Surviving Winter)   |
| Citizens Advice Bureau – South Somerset | <b>£1,224</b> | Weekly advice drop-in service  |
| Crewkerne Rugby Football Club           | <b>£500</b>   | Smokefree policy for Crewkerne Rugby Football Club                         |
| Good Fellowship Club                    | <b>£500</b>   | Social and recreational activity for physically challenged senior citizens |
| Growing Space                           | <b>£2,000</b> | Gardening sessions for children with disabilities                          |
| Hamdon Youth Group                      | <b>£300</b>   | Refurbishment of skate park  |

continued

|   |         |  |
|---|---------|--|
| Henhayes Centre                               | £500    | Business planning and management support   |
| Horseshoes and Handprints                     | £2,620  | Horse therapy sessions for children with disabilities                                |
| Langport & Huish Youth Group                  | £1,043  | Youth outreach   |
| Langport Community Christmas                  | £150    | Community Christmas lunch  |
| Lucy Campbell Trust / Holton Village Hall     | £200    | Christmas luncheon event   |
| Monks Yard                                    | £500    | Community Christmas lunch  |
| Rotary Club of Langport & Somerton            | £25     | Small grants to help older people stay warm in winter (Surviving Winter)             |
| Somerset Parent Carer Forum CIC Ltd           | £3,000  | Training for parents of children with disabilities                                   |
| Somerset Parent Carer Forum CIC Ltd           | £825    | IT equipment for Bridgwater Parent Support Group                                     |
| South Barrow PCC                              | £20,000 | Church re-ordering   |
| South Petherton Cricket Club                  | £500    | Smokefree policy for South Petherton Cricket Club                                    |
| South Somerset Community Accessible Transport | £4,500  | Community transport for people who cannot access public services                     |
| South Somerset MIND                           | £5,000  | Mental health drop-in for young people in Frome                                      |
| South Somerset MIND                           | £1,410  | Therapeutic gardening  |
| South Somerset MIND                           | £100    | Vital Signs Prize Award  |
| SSVCA   | £2,200  | Development of training for small community groups                                   |
| SSVCA   | £800    | Let's End Loneliness in South Somerset conference                                    |
| Streetspace Youth Project                     | £3,654  | One-to-one mentoring for young people  |
| The Balsam Centre                             | £4,000  | Match funding for mental health project  |
| The Charltons Parish Council                  | £400    | Community Christmas lunch  |
| Ups and Downs South West                      | £3,500  | Youth clubs for young people with Down's Syndrome                                    |
| Ups and Downs South West                      | £3,000  | New baby home visiting service   |
| Westland Sports Cricket Club                  | £500    | Smokefree policy for Westland Sports Cricket Club                                    |
| Wincanton Live at Home                        | £1,288  | Small grants to help older people stay warm in winter (Surviving Winter)             |
| Wincanton Live at Home                        | £5,000  | Social activities for isolated older people  |
| Yeovil & Sherborne Hockey Club                | £500    | Smokefree policy for Yeovil & Sherborne Hockey Club                                  |
| Yeovil Community Church Trust                 | £3,000  | Support for families in crisis   |
| Yeovil Freewheelers EVS                       | £4,825  | Replacement motorbike  |
| Yeovil Men's Shed                             | £1,000  | A project where people come together to take part in practical and social activities |
| Yeovil Men's Shed (c/o South Somerset Mind)   | £900    | A 'Mens' Shed' project where people come together to take part in activities         |
| Yeovil Opportunity Group                      | £3,850  | Support costs for the delivery of core activities                                    |
| Yeovil Town Community Sports Trust Ltd        | £4,762  | Volunteer 108  |

| Taunton Deane grant applicant                           | Amount  | Description  |
|---|---------|--|
| 1st Wellington Scouts                                   | £4,892  | Community building renovation  |
| Actiontrack   | £23,439 | Refurbished music equipment and studio   |
| Active Living Friendship Group                          | £115    | Christmas lunch and entertainment (singer) for club members                    |
| Active Living Friendship Group                          | £1,722  | Subsidised transport for older people to attend day centre activities          |
| Age UK Somerset   | £5,000  | Befriending service  |
| Blackdown District Scouts, Tangier Scout & Guide Centre | £11,000 | Adventure play equipment for Scouts campsite                                   |
| Blackdown Support Group                                 | £500    | Volunteer support costs  |
| Blackdown Support Group                                 | £500    | Support to the elderly and the infirm in the Blackdown Hills                   |
| Blackdown Youth Club                                    | £5,000  | New equipment and storage for the youth club                                   |
| CBO Community Bus                                       | £350    | Signage for new community bus  |
| Centre for Outdoor Activity & Community Hub (COACH)     | £3,220  | Kayaking for children with special educational needs                           |
| Cheddon & West Monkton Film Club                        | £1,000  | Film projector   |
| Churchinford & District Village Hall                    | £1,000  | Redecoration of meeting room   |
| Churchstanton Public Open Space Management Group        | £900    | Grass cutting  |
| Churchstanton Public Open Space Management Group        | £900    | Maintenance of community open space  |
| Citizens Advice Taunton & District                      | £2,850  | Small grants to help older people stay warm in winter (Surviving Winter)       |
| Compass Disability Services                             | £10,000 | Somerset Social Enterprise Loan of £61,000 and £10,000 grant                   |
| Crusaders' Friendship Group                             | £500    | Social activities for older people   |
| Escape Support Group                                    | £1,000  | Summer trip to Butlins Minehead  |
| Escape Support Group                                    | £3,600  | Support costs for the delivery of core activities                              |
| Exmoor Search and Rescue                                | £1,000  | Flood Response Personal Protective Equipment                                   |
| GoCreate Taunton CIC for Taunton Live                   | £2,000  | Workshops for creative arts festival   |
| Golden Oldies   | £660    | Singing sessions for older people  |
| Healthy Babies UK                                       | £1,000  | Training volunteer breastfeeding peer support group leaders                    |
| In the Mix Youth Project                                | £250    | Development grant to improve outcome measurement and reporting                 |
| Knightstone Housing Association (W-S-M)                 | £2,000  | Small grants to help older people stay warm in winter (Surviving Winter)       |
| Love Musgrove   | £1,000  | Equipping the Discharge Lounge re Juliet and James Bacons' Appeal              |
| Mencap Taunton  | £1,000  | Day trips for adults with learning disabilities                                |
| MIND in Taunton & West Somerset                         | £1,200  | Outdoor volunteering for adults with mental ill-health                         |
| MIND in Taunton & West Somerset                         | £1,000  | Intentional peer support group for adults with poor mental wellbeing           |
| MIND in Taunton & West Somerset                         | £950    | User-led peer support group for people with mental health problems in Minehead |
| Myaware   | £500    | Taunton-based support group for local people with Myasthenia Gravis            |
| NFW Friends of the Village Hall                         | £250    | Community Christmas events   |
| North Taunton Partnership                               | £4,180  | Equipment for the Golden Age Olympics  |
| North Taunton Partnership                               | £485    | Community Christmas activities   |
| Oake and District Village Hall and Recreation Ground    | £2,000  | Play area refurbishment  |

continued

|  |         |   |
|--|---------|---|
| On Your Bike   | £1,160  | Staff training  |
| On Your Bike   | £5,000  | Support costs for the delivery of core activities   |
| PCC Churchstanton  | £750    | Refreshment area  |
| Read Easy Taunton North Group  | £2,500  | Support costs for the delivery of core activities   |
| Reminiscence Learning  | £2,600  | Intergenerational singing sessions for people with dementia and primary school children     |
| Reminiscence Learning  | £100    | Donor directed grant on behalf of Emma Porter, Passion to Give Annual Charity Ball          |
| Samaritans of Taunton and Somerset                                     | £1,000  | Volunteer recruitment campaign  |
| Somerset Community Care Matters  | £895    | Volunteer-led advice and support addressing older people's barriers to living independently |
| Somerset Playing Fields' Association                                   | £750    | Advice to community groups running playing fields and children's play areas                 |
| St. Peter's Church and Community Hall                                  | £500    | Redecoration of church hall and foyer   |
| Staplegrave Scout Group  | £1,000  | Scout camp shelter  |
| Tacchi-Morris Arts Centre  | £3,000  | INCLUDE arts project  |
| Taunton Baptist Church   | £5,000  | Furniture and equipment for the youth club  |
| Taunton Bowling Club   | £500    | Smokefree policy for Taunton Bowling Club   |
| Taunton Deane Borough Council  | £4,250  | Small grants to help older people stay warm in winter (Surviving Winter)                    |
| Taunton Dementia Action Alliance<br>c/o Creative Innovation Centre CIC | £250    | Supporting people with dementia   |
| Taunton Foodbank   | £1,000  | Emergency food supplies for people in crisis  |
| Taunton Hard of Hearing Club   | £500    | Support costs for the delivery of core activities   |
| Taunton Opportunity Group  | £3,850  | Support costs for the delivery of core activities   |
| Taunton Rowing Club  | £500    | New boats and equipment   |
| Taunton Rowing Club  | £500    | Smokefree policy for Taunton Rowing Club  |
| Taunton Theatre Association Ltd  | £10,000 | Equipping studio and creative hub   |
| Taunton YMCA   | £500    | Community Christmas activities  |
| The Wellington Basins Volunteer Group                                  | £650    | Equipment for environmental management of local area  |
| The Willow Set Preschool and Sun Up Sun Down Club                      | £1,000  | Storage shed for play equipment   |
| Tone Leisure (South West) Ltd  | £9,962  | Equipment for youth club  |
| Trident Youth and Community Centre                                     | £730    | Renovation of men's toilets   |
| Wellington Fox's Hockey Club   | £500    | Smokefree policy for Wellington Fox's Hockey Club   |
| Wellington RFC   | £500    | Smokefree policy for Wellington RFC   |
| Wellington Street Pastors  | £1,000  | Support costs for the delivery of core activities for street pastors                        |
| West Buckland Friendship Club  | £500    | Friendship Club activities for isolated older people  |
| West Hatch Scout Group   | £1,750  | Back to West Hatch  |
| WHERE  | £3,500  | Transport for vulnerable adults   |

| West Somerset grant applicants          | Amount  | Description   |
|---|---------|---|
| All Saints C Of E Dulverton             | £1,000  | Equipment for school swimming pool  |
| Crowcombe Pre-School                    | £500    | New books, toys and outdoor play equipment                                |
| Dulverton and Brushford Pastimes Club   | £500    | Community Christmas lunch   |
| Dulverton Cricket Club                  | £500    | Smokefree policy for Dulverton Cricket Club                               |
| Exford Cricket Club                     | £500    | Smokefree policy for Exford Cricket Club                                  |
| Forum 21                                | £11,400 | Small grants to help older people stay warm in winter (Surviving Winter)  |
| Healeys Amenities                       | £200    | Community Christmas lunch   |
| Home-Start West Somerset                | £2,500  | Volunteer home visits for families experiencing difficulties              |
| Jackdaws Music Education Trust          | £600    | Classical music performances by young people                              |
| MIND in Taunton & West Somerset         | £1,025  | Minehead Peer Support Group   |
| Minehead Cricket Club                   | £500    | Smokefree policy for Minehead Cricket Club                                |
| Minehead Eye Youth and Community Centre | £980    | Pilot music education project for young adults with learning disabilities |
| Minehead Eye Youth and Community Centre | £1,500  | Scooter Academy/Safety Project  |
| Stogumber Festival                      | £600    | Dance and drumming for young people                                       |
| Superact!                               | £1,000  | Arts and crafts activities for older people                               |
| The Orchard Social Club                 | £450    | Sports activities for older people  |
| The Orchard Social Club                 | £300    | Community Christmas lunch   |
| Watchet Youth Club                      | £2,000  | Targeted youth work for young women                                       |
| West Somerset Advice Bureau             | £2,000  | Rural outreach service  |
| West Somerset Advice Bureau             | £4,949  | Training of volunteer advisors  |
| West Somerset Community Land Trust      | £2,480  | New website and launch events   |
| Wimbleball Sailability                  | £1,000  | Power boat for wheelchair users   |

| Out of County grant applicants                    | Amount  | Description   |
|---|---------|---|
| Bloodwise   | £100    | Donor-directed grant towards general fundraising appeal                         |
| Children's Hospice South West                     | £100    | Donor-directed grant towards general fundraising appeal                         |
| Living Paintings                                  | £200    | Donor-directed grant towards local fundraising appeal                           |
| Macmillan Cancer Support                          | £50     | Donor-directed grant towards general fundraising appeal                         |
| Quartet Community Foundation                      | £1,500  | Donor-directed grant on behalf of Somerset Crimebeat Trust                      |
| Royal Brompton and Harefield NHS Foundation Trust | £26,000 | Blood test research to detect genetic heart defects on behalf of Elliot's Touch |
| Tŷ Hafan  | £50     | Donor-directed grant towards local fundraising appeal                           |
| Visually Impaired Bowls England                   | £1,500  | World Blind Bowls Championship  |
| West of England MS Therapy Centre                 | £100    | Donor-directed grant towards general fundraising appeal                         |



# The impact of our funding on our local voluntary sector

We believe that to create vibrant and inclusive communities, there must be a strong and thriving voluntary, community and social enterprise sector.

During the year, the overall investment we made into our communities was worth £752,329. This figure includes payments made to local groups that are signed up to fundraise through the website [localgiving.com](http://localgiving.com). Ten organisations were also awarded a total of £262,333 in capital grants from a new programme created by Taunton Deane Borough Council from the proceeds of the sale of the former Taunton Youth and Community Centre.

With an average grant size of £2,400, we supported 208 grassroots organisations to deliver work into local communities.

## The typical organisations we funded in 2016/17:

- Help 100 people each year
- Rely on 10 volunteers
- Have an annual income of £36,000

**£2,400**

Average grant size



You have a good understanding of how charities, especially small charities, actually function on a day-to-day basis and you are a strong and supportive advocate for their work.

GRANT APPLICANT, 2017



It is good to have a single focus in Somerset that brings together many different funders, and makes the whole application process much easier. The team are local, therefore focused on the issues we face, and helpful regarding the application process and subsequent feedback.

GRANT APPLICANT, 2017

continued

**The Somerset Social Enterprise Fund (SSEF)** is funded by Somerset County Council and the Access Foundation Growth Fund. It provides a blended package of loans and grants to support work that will make a social impact within local communities while also generating a financial return.

We understand that social investment will be new to many local VCSE organisations. Unlike regular grants programmes, successful applicants receive a lot of advice and support from us, and others, to help them succeed in their venture.

#### Features of the SSEF include:

- Blended, unsecured social investment of between £25,000 and £100,000
- Grants will normally be up to 50% of an accompanying loan
- On-going support to help you succeed in your venture or project
- Fixed interest rates

#### Case Study: Compass Disability Services

In 2016/17, we agreed a loan and grant package from the SSEF worth £71,000 with Compass Disability Services. First established in 2000, the Taunton-based charity has a committed team of staff and volunteers working together to enable and empower disabled people and carers to have independence, choice and control in their lives through providing a variety of services. Funding from the SSEF contributed to the build of Compass Wellbeing, a day centre that includes a fully accessible café, hydrotherapy pool, sensory room, community garden and activity suite.



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# The impact of our funding on individuals

## Transforming and Enhancing Lives

Our Theory of Change culminates in a strong and vibrant voluntary sector that enhances the lives of the most disadvantaged people of all ages from across the county.

The organisations that we funded in 2016/17 carried out work that improved the lives of nearly 50,000 local people. In respect of who has benefitted from our funding, again, many projects will help a wide variety of people. However, we can report that most of our funding helped:

- Children and young people (39%)
- Older people (24%)
- People with mental health conditions (8%)

Over the last few years we have introduced several grants programmes that directly support individuals. In 2016/17 we awarded £50,000 to 46 individuals from the following programmes:

- 31 grants from the Eagle House Fund to young people leaving care to access further and higher education and other training opportunities
- 6 grants from the West Somerset Youth Trust helping young people in West Somerset access personal development opportunities
- 5 Somerset Flood Relief grants to 3 households affected by the 2014 floods
- 3 grants from the Norah Cook-Hurle Trust to nurses undertaking specialist training
- 1 grant from the Solutions for an Ageing Society fund to help an individual start a social enterprise

continued



### **Case Study: The West Somerset Youth Trust**

The West Somerset Youth Trust is a programme managed by Somerset Community Foundation that offers grants to encourage young people aged 14–25 to enrich their education through extra-curricular activity. Grants can be used to pay for course or event fees, travel costs, equipment or materials to attend international scouting jamborees, gap year trips, work experience placements, Duke of Edinburgh expeditions, and workshops at the National Youth Theatre. One young person from West Somerset used his recent grant to help him realise a dream of participating in the transatlantic Rendez-Vouz 2017 Tall Ships Regatta. This incredible opportunity has inspired him to study Yacht Operations at university upon completing his A levels.



**This incredible and invaluable experience would not have been possible without your support and I would like to say a huge THANK YOU to the Somerset Community Foundation for making this possible.**

**GRANT APPLICANT, 2017**



# Focus on: Advancing people's mental and physical health

**£113,482**

Value of grants awarded

In Somerset, more than two in every 100 people are in contact with a mental health service, which is higher than the average for England. Loneliness and isolation have a significant effect on our mental health. Many of the grants we award are designed to reduce these challenges, particularly in rural areas. A recent study by one of our grantees, 2BU, also highlighted the impact of homophobia and investigated the potential impact this has among young people who identify as lesbian, gay, bisexual, transgender and questioning (LGBTQ). 85% of the respondents had either been bullied or had witnessed bullying; 75% reported deliberate self-harm; and almost 50% had attempted suicide.

Peer support groups are one way that people with mental health issues support each other, and a network of peer support groups exists across Somerset, facilitated by a range of local community groups and charities.



## Case Study: Mind TWS Art Group in Minehead

Mind in Taunton & West Somerset run a wide range of groups for people with mental health issues, and Mind TWS Art Group in Minehead is one of their support groups which has been running for the last six years. Referrals are made to the group from their local mental health outpatient unit, with many new members isolated and in need of contacts in the community.

At weekly sessions, the group members develop their art skills and share their experiences with each other and have now begun exhibiting their art at local venues.

A grant of £1,025 in March 2016 helped the group to run throughout the year.





Members find relaxation and respite from difficult mental health conditions by using materials to express their feelings and find a creative outlet in their art work. It is also an important social hub where friendships are sustained and people feel confident and secure.

**RACHEL GUNDRY, GROUP LEAD,  
MIND TWS ART GROUP IN MINEHEAD**

# Focus on: Reduction of isolation and disadvantage

**£227,369**

Value of grants awarded

Loneliness and isolation can have a profound impact on the health and wellbeing of older people across the UK, and Somerset is no exception.

Developing interventions to promote social activity among older men can be a challenge, particularly as men generally find it more difficult to join social or wellbeing groups.

Once retired, men can find themselves feeling lonely and isolated as they struggle to find social settings within which they feel comfortable interacting with other men.

In the last couple of years there has been a growth in projects aimed at tackling social isolation and loneliness among men. One recent and rapidly developing social activity intervention is the Men's Shed movement.

## **Case Study: Yeovil Men's Shed**

We were delighted to support the Men's Shed in Yeovil last year, which is helping to combat the issue of isolation among older men by offering them an opportunity to make new friends, and share skills and knowledge in a community environment through engagement with hands-on DIY activities.

Yeovil Men's Shed was set up in 2015 and is a place where men (and women) from all walks of life come together to work and socialise over a cup of tea. It's a friendly place, where members share the

tools, knowledge and resources they need to work on projects of their choosing, at their own pace. It is a place where skills are shared and learning is informal; where achievement and social interaction go hand-in-hand with individual pursuits and community projects. The group has links with the Salvation Army, Abilities, Newtown TRA and the local hospice, where they plan to offer a horticultural therapy service, supporting people who are experiencing psychological stress.

Their first grant of £900 was awarded in June 2016 for set up costs and a further £1000 was awarded in February 2017 for equipment.



“

One of our shedders has early onset dementia and asks his wife every morning if it's 'shed day'. She's delighted that, since he's joined, there's 'a little spark back in her husband'. He attends the shed every Tuesday and always brings along a bit of wood. Together, we plan what he can make. He's already made several bird boxes and bird tables.

DUNCAN RICHARDS,  
YEOVIL MEN'S SHED



# Focus on: Improving life skills, education and employability

Also see  
Raising  
Aspirations  
p26

**£82,533**

Value of grants awarded

Just over 12,000 children and young people in Somerset have special educational needs and disabilities (SEND). These pupils are almost three times as likely as those without SEND to be eligible for free school meals. And in Somerset boys are twice as likely than girls to be in this group. The transition to young adulthood is a key concern: 20% do not remain in education or training after they finish school at 16, while the percentage gaining a level 2 or level 3 qualification at 19 has been decreasing in the county.

VCSE organisations in Somerset have a good track record of providing educational enrichment and vocational qualifications for young people with SEND. They form part of a growing network of alternative educational providers offering Forest Schools, art and music therapy, and other opportunities for pupils.

## Case Study: Back on Track

Back on Track works with local schools and agencies to help young people with complex needs and sometimes chaotic lives to develop skills through contact with horses, hosted by local commercial riding schools.

The group works closely with local schools to identify pupils who could benefit the most from the experience, working alongside the teachers to track the pupils' progress. Back on Track uses a simple 'before and after' scale to understand the changes their work has on a young person's sense of achievement, motivation, and their ability to deal with conflict. Their

results indicate significant changes in all these areas, and demonstrates how a small group can measure its impact.

Two grants totalling £6,500 were made to Back on Track in February 2017, which has helped them to deliver their ten-week course to around 25 children.





“

We could not have achieved all that we have done for the children of Somerset without the help, generosity and advice of the trustees and staff at Somerset Community Foundation. I'd like to thank them very much.

SALLY WHITTAKER, BACK ON TRACK



# Focus on: Creating stronger communities

**£67,058**

Value of grants awarded

Strong communities are those where people have pride in where they live, where people are confident, welcoming, resilient and able to respond positively to the challenges that they face.

In 2016, a local survey of charity and voluntary sector organisations was carried out. Results paint a picture of a diverse sector committed to meeting local needs.

However, we want to ensure that local people in Somerset continue to have the drive, confidence and commitment to make a difference in their neighbourhood. We do this by continuing to support the voluntary and community sector, improving the range of activities available and tackling social isolation.

## Key Fact

In 2016 there were 2803 charities registered with the Charity Commission as active in Somerset, with 100s more community groups. 68% of these are 'micro' or 'small' organisations and 56% have no full time workers, relying to a very large extent on the support of their volunteers.

## Case Study: Edventure Frome CIC

Edventure Frome CIC received a grant of £5,000 in January 2017 to deliver an intervention for a group of young Eritrean refugees who have been settled in the town. They have begun providing weekly woodwork sessions at the request of the young people and with the support of local volunteers.

The grant will allow them to continue this over the coming year. This project has the potential to have a significant impact on the lives of a group of very vulnerable young people. It will offer an opportunity for people from different backgrounds to meet and work together over a prolonged period of time, building lasting friendships and a sense of belonging to the community in Frome.





“

Integrating refugees into host communities is crucial in building strong, inclusive communities. Working with volunteers and involving local young people in the project has been an effective way to help achieve this and strengthen cohesion in our town.

JOHANNES MOELLER,  
CO-FOUNDER AND DIRECTOR,  
EDVENTURE

# Focus on: Connecting people with arts, culture, heritage and environment

**£25,792**

Value of grants awarded

Access to the arts, culture and heritage is inconsistent across Somerset, and while our county is ranked the fifth most beautiful natural area in England, not everyone is able to enjoy the local environment.

Many local groups organise cultural events that bring their communities together, while others employ arts and heritage to engage those who face considerable challenges in their lives.

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## Case Study: Actiontrack

Actiontrack uses music and theatre to improve lives and enhance communities. Working in partnership with the education sector, community organisations, local authorities and public services they deliver and develop participatory music and theatre projects that engage those who do not normally access the arts.

This year we awarded Actiontrack a grant of £23,440 to refurbish their studio and purchase new instruments. This was a major capital development for the group that has allowed them to increase the number of young people who can take part.







“

This grant has made the most positive difference possible. The most obvious result has been the development of our ability to run fully resourced sessions on a local outreach basis simultaneously with studio-based activity. This has resulted in increased project delivery to the point where we are now engaging a second part-time studio project worker to cover the increase in demand.

NICK BRACE, ARTISTIC DIRECTOR

# Raising Aspirations

Raising Aspirations, developed and piloted by Somerset Community Foundation, is a distinct and proven mentoring programme which matches volunteers from local businesses and community networks to provide support to young people.

The programme is focused on encouraging students to develop their self-belief and aspirational life goals by building a relationship of trust and respect between the mentor and mentee.

The pilot commenced in autumn 2011. Following early success, and with funding from Taunton Deane Borough Council, we were able to extend the pilot to Taunton Academy and Court Fields in Wellington.

We have been working with Dr Chris Pawson from the University of the West of England to evaluate the impact of the programme. He has been analysing data by tracking the progress of the mentees against control groups and has been able to demonstrate impacts on individual pupils' self-esteem and self-belief, aspirations and support networks. The majority of the first cohort took their GCSEs in 2016 and for the first time the results showed that the pupils who were mentored achieved statistically significantly better GCSE results than a corresponding control group.



“

**My mentee has become more open and a good deal more confident. His mother wrote a note to the school to this effect; she was impressed by the change in her son.**

**COURT FIELDS SCHOOL MENTOR**



“

**I used to care so much what people thought of me that I would take time off sick from school as I was so worried. Mentoring has given me so much confidence, encouraged me to put myself forward for things and try things I've never done before.**

**CRISPIN SCHOOL STUDENT**

“

**“Mentoring is the best thing about The Taunton Academy.” That was the succinct assessment of the students from Ofsted Inspectors. Mentors are people who our students trust and they help our students to achieve their goals, to learn and grow, and to live life in all its fullness.**

**REVD MIKE HASLAM,  
THE TAUNTON ACADEMY**





# Surviving Winter

Our award-winning Surviving Winter programme continues to go from strength to strength every year.

In November 2016, we launched our seventh fundraising campaign, which attracted support from 480 people who donated the equivalent of their Winter Fuel Payment. Nearly 28% of these donors had never contributed to the Surviving Winter campaign before, and we're heartened to know that pensioners in Somerset are inspired to directly help their local peers who are living in fuel poverty.

In 2016/17, the appeal raised £78,486 in total, helping nearly 500 older people's households stay warm, active and better connected through the winter period.

---

## Case Study:

Surviving Winter has connected Mrs. Watts to a case worker from Knightstone Housing. She had a fall 3 years ago and suffered an injury to her shoulder, which continuously causes her a lot of pain. She also suffers from osteoporosis in her knee, septic arthritis and a heart condition. During the winter months Mrs. Watts has the heating on for most of the day and will sit next to the radiator. The cold really affects her joints so she wears Long Johns under her trousers to keep warm. Mrs. Watts used a grant from Surviving Winter to purchase a warm pair of trousers and a long cardigan to wear when she does the weekly shop on a Thursday and her case worker also connected her with many other resources in the community to help Mrs. Watts stay warm and healthy.



To find out more about the programme,  
go to [www.somersetcf.org.uk/winter](http://www.somersetcf.org.uk/winter)

# Working in Partnership

We are exceptionally fortunate to work closely with so many people and organisations that share our passion and enthusiasm for making Somerset the great county where we live and work.

Our supporters are local families, individual donors, corporate partners and other charitable trusts. Their exceptional generosity allows us to invest in communities and provide leadership where needed.

We also have a growing portfolio of funds that we manage on behalf of local authorities, making the most of our knowledge of the voluntary and community sectors at the grassroots level.

The addition of two new funds, the Hinkley Point C Community Fund and the Access Foundation Growth Fund, are taking us to a new level, and our success will depend on the future partnerships that are created as we take these programmes forward. We look forward to working closely with these new partners.

Perhaps most importantly, we thank our partners in local charities, voluntary groups and social enterprises. Without their commitment, skill and passion, the positive changes we seek in our communities would not be possible.

**Thank  
you!**



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South West  
Academic Health  
Science Network



Esmée  
Fairbairn  
FOUNDATION

# Celebrating our 15th Anniversary



Move to office in Lower Godney



**grassroots grants**  
Planned by the Community Development Foundation



**£18.4k**  
in grants made to date

Start delivering the Government's Local Network Fund

**Surviving Winter**



Peter Wyman CBE becomes Chairman

Endowment reaches **£2million**

Move to Yeoman House

Community First Endowment Match Challenge launched

**£3m**  
in grants made to date

Endowment reaches **£3million**

**£4m**  
in grants made to date

Lord Wei guest speaker at Annual Celebration

First social investment made from Somerset Social Enterprise Fund

Jane Barrie OBE DL becomes Chairman

Hinkley Point C Community Fund launches

Endowment reaches **£5million**

**£7.2m**  
in grants made to date

2002

2003

2004

2005

2006

2007

2008

2009

2010

2011

2012

2013

2014

2015

2016

2017

Foundation registered as a charity

Founding Chairman Angela Yeoman

Launch ESF Fund Community Grants Programme

First Endowment Fund established

**£1.2m**  
in grants made to date

Grassroots Grants and SCF Endowment Match Challenge launched

Launch first Surviving Winter campaign

SCF receives national 'Charity Award'



Dame "Steve" Shirley CH DBE FREng FBCS guest speaker at Annual Celebration

**£1.5m** Somerset Flood Relief Fund launched

Endowment reaches **£4million**

Publication of first **Vital Signs** report



local network fund  
for children and young people



First Director appointed





#### Patron

Lady Gass DCVO JP

#### President

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#### Vice-Presidents

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**Programmes Manager** Andrew Ridgewell

**External Communications Executive** Sue Wheeler

**Administrator** Kirsty Campbell

\* these trustees retired in the year 2016/17

\*\* these trustees retired in the year 2017/18

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