



somerset
COMMUNITY | FOUNDATION



2012/13
Annual Review

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THE PAST YEAR HAS BEEN ONE OF STEADY PROGRESS ON ALL FRONTS DESPITE THE ECONOMIC HEADWINDS WHICH HAVE CONTINUED TO MAKE LIFE CHALLENGING FOR BOTH OUR DONORS AND THE MANY VOLUNTARY GROUPS WE SUPPORT.

“...thanks to everyone who has made all this possible - our very generous donors, our volunteers, my fellow trustees and lastly our staff who yet again have gone the extra mile...”

I am delighted to be able to report that as a result of very tight cost control we have again been able to make sure our income exceeds our expenditure thus giving rise to a small unrestricted surplus. At the same time we have been able to increase slightly the level of regular grants to £372,995; this is particularly pleasing since the need is greater than ever. We have also increased our endowment fund, our legacy to future generations of Somerset people. At the year end the fund stood at £3.16m. I must therefore put on record my thanks to everyone who has made all this possible – our very

generous donors, our volunteers, my fellow trustees and lastly our staff who have gone the extra mile to enable us to achieve so much.

Yet again we ran our very successful Surviving Winter appeal. The past winter was one of the wettest on record and many parts of the county suffered from severe flooding. In response, we created an emergency relief fund which ran alongside Surviving Winter. Somerset County Council immediately made £53,750 available and as a result we were able to provide over 360 grants to flood victims, usually within three



days of their request for help. It was also an unusually long winter with the cold weather stretching into April. This caused enormous hardship as winter heating bills soared and, as a result, we were making Surviving Winter grants over a six month period. Fortunately we had the reserves to do this but we will be hard pressed to do the same again if we have a hard or long winter this year unless we can attract even more donors to respond to the appeal.

We are now starting the third year of our Raising Aspirations programme connecting students in secondary

schools with people in work who act as mentors and help them reach their potential in life. To date we have concentrated our efforts on Crispin School in Street, supported by the Ninesquare Trust. We are now exploring how we might be able to extend the programme to other schools in Somerset.

During the year we were appointed by EDF Energy to be the independent administrator of the EDF Community Fund which will come into being if and when building work commences. This is a significant fund and will require

considerable additional management resource. However, we know what will be needed and are ready to start whenever required.

“...we know what will be needed and are ready to start whenever required...”

Mrs Katherine Armstrong, Mrs Claire Blackburn, Sir Michael Ferguson Davie and Mr Chris Davies retire as trustees at the AGM this year. I would like to record particular thanks to all of them for their sustained contribution to the Foundation; I know they will continue as friends and supporters of ours in the future.

Finally, may I again thank everyone who has helped us in so many different ways to help Somerset people overcome disadvantage. Somerset is a great county to live in; with your support we can make it even better.

Peter Wyman, Chairman



Somerset County Gazette



fulfilling
potential



tackling

disadvantage

THROUGHOUT 2012/13 SOMERSET COMMUNITY FOUNDATION INCREASED ITS IMPACT IN THE COMMUNITY, RESPONDING TO IMMEDIATE NEEDS THROUGH FLOOD RELIEF GRANTS AND THE SURVIVING WINTER CAMPAIGN. WE COMPLETED THE SECOND YEAR OF THE RAISING ASPIRATIONS PROGRAMME, AND CONTINUED OUR SUPPORT OF EFFORTS TO ADDRESS LONGER-TERM LOCAL ISSUES.

Our goals are to tackle disadvantage and transform people's lives and this is only possible thanks to the generosity of local individuals, companies and trusts. Incredibly, £4 out of every £5 awarded through our regular grant-making programmes was made available through their support which is now needed more than ever.

Towards the end of the year we began the process of reviewing and reconfirming our commitment to the three strategic priorities - increasing opportunities for children and young

people, tackling isolation and loneliness amongst the elderly, and addressing issues of rural disadvantage – and we will report on the outcome of this in 2013/14.

We are part of the Philanthropy Fellowship South West network and we have also started to engage our donors in new ways, particularly through the Below the Radar project visits. This is beginning to produce a number of additional benefits, simply by bringing people who care about an issue or place together.

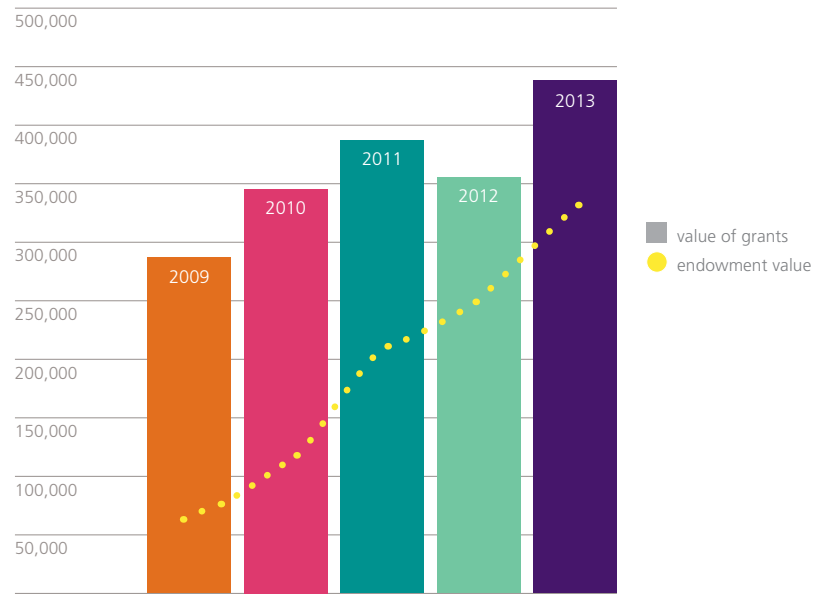
I would like to thank the Foundation's Board, my team in the office and our many volunteers for all their hard work and support. Above all I would like to express our gratitude to everyone

in our community who is committed to making Somerset a better place to live for everyone: whether you make a difference by donating funds or by turning those donations into effective action on the ground, this report is a tribute to you.

Justin Sargent, Chief Executive

FINANCIAL HEADLINES

In 2012/13 our overall expenditure on charitable work (including grants) was £564k. This includes an increase in our grant making from £361k to £432k and £23k donated through the Localgiving.com site, and even if we exclude the impact of the one-off emergency flood relief programme, we still increased our regular grant making by £12k compared to the previous year. During the same period our endowment grew from £2.56m to £3.16m. The endowment contributes an increasingly important (and sustainable) amount to our grant-making programmes each year.

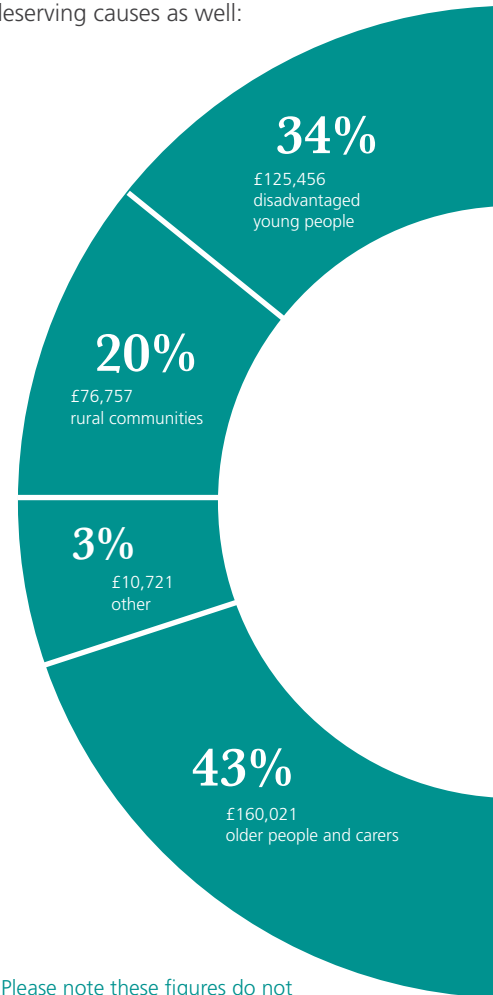


This year we are pleased to announce that we increased our regular grants programme by 11,974 or 3%.

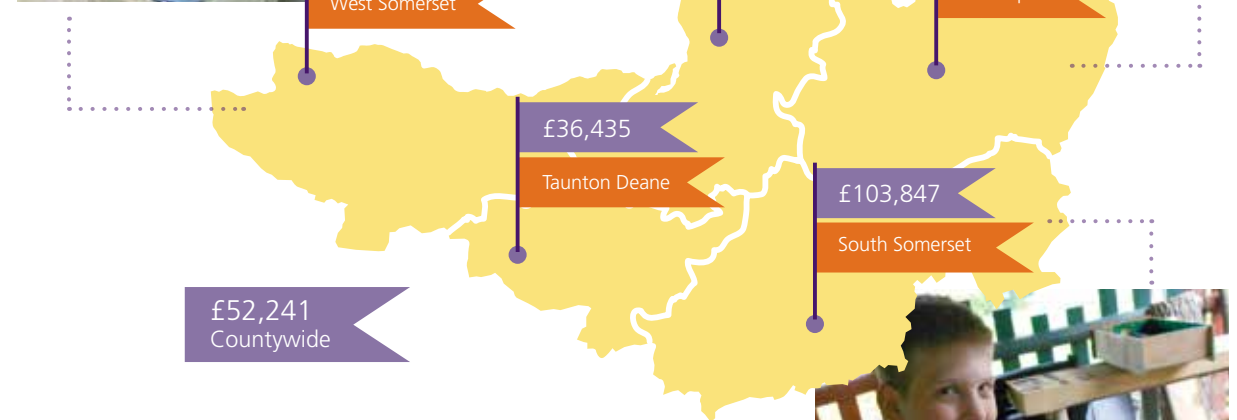
Total charitable funding provided through the foundation = **£455,872**

Grants awarded*

This year we are reporting on grants distributed across our three strategic priority areas. The Foundation's funding is focused on these areas, but we continue to award grants to other deserving causes as well:



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



“The way in which Children’s World deliver the sessions is particularly appropriate for our pupils and their use of technology to video, edit and show their practical work is invaluable.”

+++++ Senior Teacher, Children’s World



“With the help of local donations these children are able to increase their experiences and opportunities for adventure and learning in a safe environment.”

+++++ Annie Shillabeer, Langport & District Community Youth Centre





of households
in the scheme
had little or **no**
insurance cover

“It caused severe distress for both me and my wife...as I am in my eighties. We were unable to move or lift anything and felt helpless.”

+ + + + + + + + + + + + + + + +
Flood relief grant recipient

SOMERSET FLOODS 2012

England suffered its wettest year since records began in 1910, accordingly to Met Office data. Large tracts of the Somerset levels were under water for months, taking its toll on farmers and their families. Hundreds of homes and businesses were flooded, and many others were affected by extensive road closures, causing great distress through disruption and loss of earnings. The village of Mulcheney was cut off for almost a fortnight.

There had been flooding throughout 2012, but in November it hit a peak and Somerset Community Foundation approached Somerset County Council to establish an emergency relief fund for those whose homes had been flooded. SCC immediately responded with a generous donation of £53,750 and we extended the Surviving Winter appeal as a one-off measure to boost these funds.

We were able to rapidly establish a process to alleviate the temporary hardship experienced when homes were flooded. Working with County, District and Parish Councillors, as well as the local media and voluntary organisations,

flood-affected householders were made aware of the grants and supported with their applications. The majority of applicants expressed the considerable hardship that they had endured.

We received our first application for support within 24 hours of launching the scheme, and it was essential that we responded as swiftly as possible. At least 60% of grants were awarded by the third week of the scheme, and 80% of grants had been awarded by the end of the first month. By the time we closed the scheme in February 2013, we had awarded over 360 grants.

In our review of the scheme we found that 260 households we supported were occupied by either pensioners, or people with children under 5, and we estimated that 28% of households had little or no insurance cover. Our grants provided much needed short-term support to people whose world had been turned upside down.



GRANTS TO ORGANISATIONS 2012/2013

| Applicant | Amount | Funding for ... | Area |
|--|--------|---|-------|
| 10 Parishes Community Car Share Scheme | £550 | Community lift share scheme | TD |
| 1st Yeovil Girls Brigade | £500 | Leadership training for young people | SS |
| 2BU | £1,000 | Activities and support for young people aged 14-18 who identify as LGBT | C |
| 3D Support Services Ltd | £2,000 | Care and education to young people with challenging behaviour | WS |
| Accessible Transport West Somerset | £3,450 | Transport provision for the less able, disabled and elderly | SS |
| Arthritis Care (Bridgwater) | £600 | Activities for arthritis sufferers and their carers | WS |
| ArthritisCare (West Somerset) | £500 | Provision of transport for people with impaired mobility | S |
| Ashill Village Hall Committee | £600 | Seniors luncheon club | SS |
| Ashwick & Oakhill Village Hall & Recreational Ground Committee | £850 | Play area renovations in rural community | M |
| Bishop Fox's Community School | £1,000 | Fox's flyer greenpower race team | TD |
| Blackdown Healthy Living Centre | £2,000 | Healthy living activities and hearing loop | TD |
| Bridgwater YMCA | £500 | Volunteer training and educational trip | S |
| Bring Me Sunshine | £600 | Music sessions for older people | TD |
| British Red Cross (Taunton) | £3,885 | Door to door transport service for people with restricted mobility | TD |
| Bruton Mini Day Care Centre | £450 | Specialist transport for disabled and vulnerable older people | SS |
| Burnham and Highbridge Stroke Club | £820 | Specialist transport for people with impaired mobility/wheelchair users | S |
| Burnham on Sea Bowling Club | £1,000 | Specialist equipment for wheelchair users | S |
| Cannington in Bloom | £1,000 | Community gardening project involving students with learning difficulties | S |
| Cannington Parish Council | £800 | Community defibrillator and first aid training | S |
| Care and Share Time | £950 | Activities for people coping with bereavement or long term illness | SS |
| Carers Taunton and South Somerset Branch | £5,000 | Support groups, events, information and advice for carers | TD SS |
| Carymoor Environmental Trust | £2,011 | Environmental project supporting people recovering from mental ill health | SS |
| Centenary Lunch Club | £500 | Lunch club for older people who find it difficult to prepare meals for themselves | SS |
| Chard Good Companions | £500 | Social activities for older people | SS |
| CHYPPS | £3,000 | Parent support service | C |
| Clowns | £8,793 | Mobile and static toy library, scrapstore and outreach work in West Somerset | WS |
| Community Council for Somerset | £1,000 | Advice on energy saving and efficiency to vulnerable people | M |
| Corfelifts Community Car Scheme | £700 | Community car scheme | TD |
| Craftability | £750 | Craft activities for people with mental or physical long term health issues | S |
| Crewkerne Welfare Transport Committee | £1,000 | Community transport scheme for people with disabilities | SS |
| Croft House | £500 | Garden project for people suffering from dementia | WS |
| Curry Mallet & Beercombe Village Hall | £500 | Replacement heating for village hall | TD |
| DASH Club Stogursey Church of England Primary School | £750 | Breakfast club for young people | WS |
| Earlybirds Preschool | £676 | Play equipment for rural pre school | S |

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|--|---------|--|-------|
| Elim Connect Centre | £3,500 | Hot food provision for people sleeping rough | M |
| Engage CVS | £7,500 | Furniture recycling and volunteer support | WS |
| Escape Support Group | £500 | Day trips for disabled children and their families | TD |
| Evercreech Friendship Club | £572 | Transport, venue hire and activities for senior citizens | M |
| Evercreech Youth Club | £800 | Disabled access for youth club building | M |
| Exford Parish Memorial Hall | £1,868 | Kitchen upgrade and hearing loop for community facility | WS |
| Exmoor Community Bus Association | £990 | Affordable transport in rural isolated area | WS |
| Friends in Retirement | £300 | Meetings and social activities for older people | SS |
| Frome Cheese and Grain | £1,000 | Wheelchair access ramp | M |
| Frome and District Day Centre | £1,100 | Provision of hot lunches for older people during the winter months | M |
| Golden Oldies | £1,916 | Singing and movement workshops for elderly people | M |
| Happy Companions Over 55's Club | £1,000 | Social activities for the over 55s | S |
| Health and Local Food for Families (HALFF) | £3,000 | Healthy eating project for families on low incomes | SS |
| Heather Club (Speech After Stroke) | £3,222 | Specialist transport for people affected by stroke | S |
| Henstridge RDA | £2,000 | Horse riding for disabled adults and children | S |
| Highbridge Area Food Bank | £1,500 | Emergency food parcels for people in crisis | WS |
| Hinton St George & Locality Rural Community Services | £30,150 | Refurbishment of community shop | SS |
| Home-Start Bridgwater | £9,815 | Support and friendship to vulnerable families in Sedgemoor | S |
| Home-Start West Somerset | £4,072 | Training for home visiting volunteers and support for disadvantaged families | WS |
| Isle of Wedmore Rural Transport Association | £650 | Refresher training for volunteer drivers | S |
| IT Help @ Home | £1,500 | IT sessions for isolated people | SS |
| Kilmersdon Community Park | £4,000 | Play park and community garden | M |
| Kilve Village Hall | £3,250 | Kitchen upgrade for community facility | WS |
| Kingsbury Community Enterprise Ltd | £3,000 | Community shop serving rural community | SS |
| Langport & District Community Youth Centre | £1,000 | Educational camping trips for disadvantaged young people | SS |
| Langport and Huish Senior Citizens Club | £500 | Social activities for older people | SS |
| Langport Church Community Trust | £750 | Social and welfare activities | SS |
| Lawrence Centre | £2,000 | Transport for older people | M |
| Little Otters | £1,000 | Pre-school activities | S |
| Mendip Community Transport | £1,000 | Transport to hospital for vulnerable people | M |
| Mendip Disability Forum | £1,000 | Consultation forum for people with physical disabilities and service providers | M |
| Mendip YMCA | £2,500 | Volunteer support | M |
| Midwest European Communities Association | £2,500 | Lingo Link project for EU citizens in Somerset | M |
| Mind in Sedgemoor | £2,235 | Lunch clubs and counselling for people suffering mental ill health | S |
| Mind in Taunton & West Somerset | £750 | One-to-one emotional support for people suffering from mental ill health | TD WS |
| Minehead Cricket Club | £6,000 | Cricket club facilities and coaching for students with learning difficulties | WS |
| Minehead EYE Community Interest Company | £3,000 | Taster sports sessions for children from low income families | WS |
| Misterton Women's Institute | £1,250 | Replacement oven for senior citizens luncheon club | SS |

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|--|--------|--|----|
| Montacute Wednesday Club | £180 | Monthly luncheons and outings for over 60s | SS |
| North Newton Primary School PTFA | £1,500 | Minibus for rurally isolated primary school | S |
| North Taunton Partnership | £3,000 | Advice surgeries and activities for the elderly | TD |
| Norton Fitzwarren Village Hall | £2,500 | Senior citizens luncheon club | TD |
| Nunney Pre School | £322 | IT equipment for rurally isolated pre school | M |
| Openstorytellers Ltd | £1,572 | Activities for people with learning and /or communication difficulties | M |
| Outdoor Challenge | £720 | Social activities and life skills for young people | S |
| PACE (Personal Achievements Creative Experiences) | £3,372 | Social and creative opportunities for people with physical /sensory impairment | M |
| Positive Action on Cancer | £1,000 | Professional counselling sessions for older people affected by cancer | M |
| PROMISEworks | £4,026 | Mentoring service for vulnerable young people | C |
| Relate Dorset and South Wiltshire | £2,000 | Counselling for people on low incomes | SS |
| Reminiscence Learning | £7,442 | Dementia awareness project | TD |
| Revive Youth CIC | £2,000 | Educational activities for young people not in education, employment or training | TD |
| Rotary Club of Langport | £2,000 | Community cafe for people with memory problems and their carers | SS |
| Seavington Community Shop & Services Association | £1,300 | Replacement kitchen equipment to maintain lunch service to older people | SS |
| Sedgemoor Citizens Advice Bureau | £3,000 | Outreach activity to support older people over the winter months | S |
| Shepton Mallet University of the Third Age (SMU3A) | £400 | Singing for pleasure sessions for older people | M |
| Shipham Community Car Scheme (SCCS) | £600 | Community car scheme | M |
| Somerset Army Cadet Force | £2,000 | Summer camp places for cadets from disadvantaged backgrounds | TD |
| Somerset County Sports Association for Disabled | £600 | Have a Go sports days for people with physical and learn disabilities | M |
| Somerset Earth Science Centre | £750 | Intergenerational community events for retired quarrymen | M |
| Somerset Motor Project | £1,985 | Vehicle maintenance workshops for disengaged young people and adults | SS |
| Somerset Rural Youth Project | £3,227 | Volunteer support and research into attitudes and aspirations of young people | C |
| Somerset Youth & Community Sailing Association | £1,000 | Sailing activities for disadvantaged children | S |
| South Petherton 60 Club | £1,000 | Transport and activities for the over 60s club | SS |
| South Petherton Parish Council | £968 | Community library | SS |
| South Somerset Disability Forum | £900 | Disability sport showcase and healthy living day | SS |
| South Somerset MIND | £5,000 | Outreach work with young people | SS |
| Spaxton Village Hall | £500 | Replacement flooring for rural community venue | S |
| St Benedicts Parish Council | £750 | Christmas lunch for disadvantaged and isolated people in the community | SS |
| St Francis of Assisi PCC | £750 | Equipment for community venue in a deprived area of Somerset | S |
| St Francis Youth Club | £2,100 | Holiday play activities for disadvantaged children | S |
| St John Fellowship | £750 | Social activities and support for former members of the St John Ambulance | WS |
| St Michael's First School PTFA | £5,000 | Trainer swimming pool for school and community use | WS |
| STAR | £2,572 | Sports activities for disadvantaged young people | C |
| Stogursey Oral History Project (SOH) | £480 | Oral history project on daily life in the Stogursey parish | WS |
| Stoke St Gregory Baptist Church Luncheon Club | £1,500 | Lunch club for elderly residents | TD |
| Streetspace Youth Project | £1,000 | Counselling service for young people in crisis | SS |
| SWEDA | £8,500 | Support for people affected by eating disorders | C |

| | | | |
|--|--------|--|----|
| Tai Chi For Health | £2,250 | Training of volunteer Tai Chi instructors | WS |
| Taunton Asthmatic Swimming Club | £450 | Volunteer training | TD |
| Taunton Foodbank | £5,000 | Emergency food for local people in crisis | TD |
| The Balsam Centre | £2,816 | Work related skills training/support for vulnerable unemployed people | SS |
| Timberscombe Village Hall | £1,500 | Film projector and black out curtains | WS |
| Towards Tomorrow Together | £2,000 | Support for bereaved parents | C |
| Transport around Baltonsborough (TABS) | £1,000 | Community transport service for vulnerable persons. | M |
| TS5C | £3,511 | Wheelchair basketball league bringing together able bodied and disabled athletes | C |
| Ups and Downs South West | £3,000 | Youth club activities for teenagers with Downs Syndrome | C |
| Watchet Energy Group (primary applicant) with Forum 21 and Friends of Little Vikings | £2,320 | Volunteer training and home energy efficiency support to vulnerable families | WS |
| Wells Active Living Group | £500 | Transport to day centre for vulnerable and isolated older people | M |
| Wells Vineyard | £1,170 | Support for people who are homeless or in unstable accommodation | M |
| West Buckland Friendship Club | £1,000 | Activities and outings for senior/ disabled club members | TD |
| West Huntspill Allotment Society | £1,000 | Drainage system for community allotments | S |
| West Huntspill Mini Day Centre | £653 | Equipment for people with impaired hearing and provision of hot lunches | S |
| West Somerset Advice Bureau | £3,000 | Outreach sessions and home visits to advise on benefits and home energy savings | WS |
| WHEELS | £1,100 | Community transport for vulnerable people | WS |
| WHERE | £6,000 | Transport and home cooked food for disabled or isolated vulnerable elderly | TD |
| Wincanton Live at Home | £2,000 | Safe social contact and support for lonely and isolated older people | SS |
| Witham Friary Village Hall | £1,500 | Improvements to rural village hall | M |
| Yeovil Day Centre | £1,850 | Chair based exercise activities to aid older people and those with disabilities | SS |
| Yeovil Opportunity Group | £5,000 | Preschool provision for children with additional needs | SS |
| Young People Frome | £3,000 | Young people's retail and services market | M |

Key

M Mendip
S Sedgemoor

SS South Somerset
TD Taunton Deane

WS West Somerset
C Countywide

FOCUS: CREATING OPPORTUNITIES FOR DISADVANTAGED YOUNGER PEOPLE

GROWING UP IN SOMERSET HAS MANY ADVANTAGES, BUT THERE ARE CLEAR SIGNS THAT MANY CHILDREN AND TEENAGERS FACE CHALLENGES. AT ANY TIME THERE ARE AROUND 500 'LOOKED AFTER' CHILDREN IN THE CARE OF SOMERSET COUNTY COUNCIL, AND ROUGHLY 15% CHILDREN AND YOUNG PEOPLE LIVE IN POVERTY.

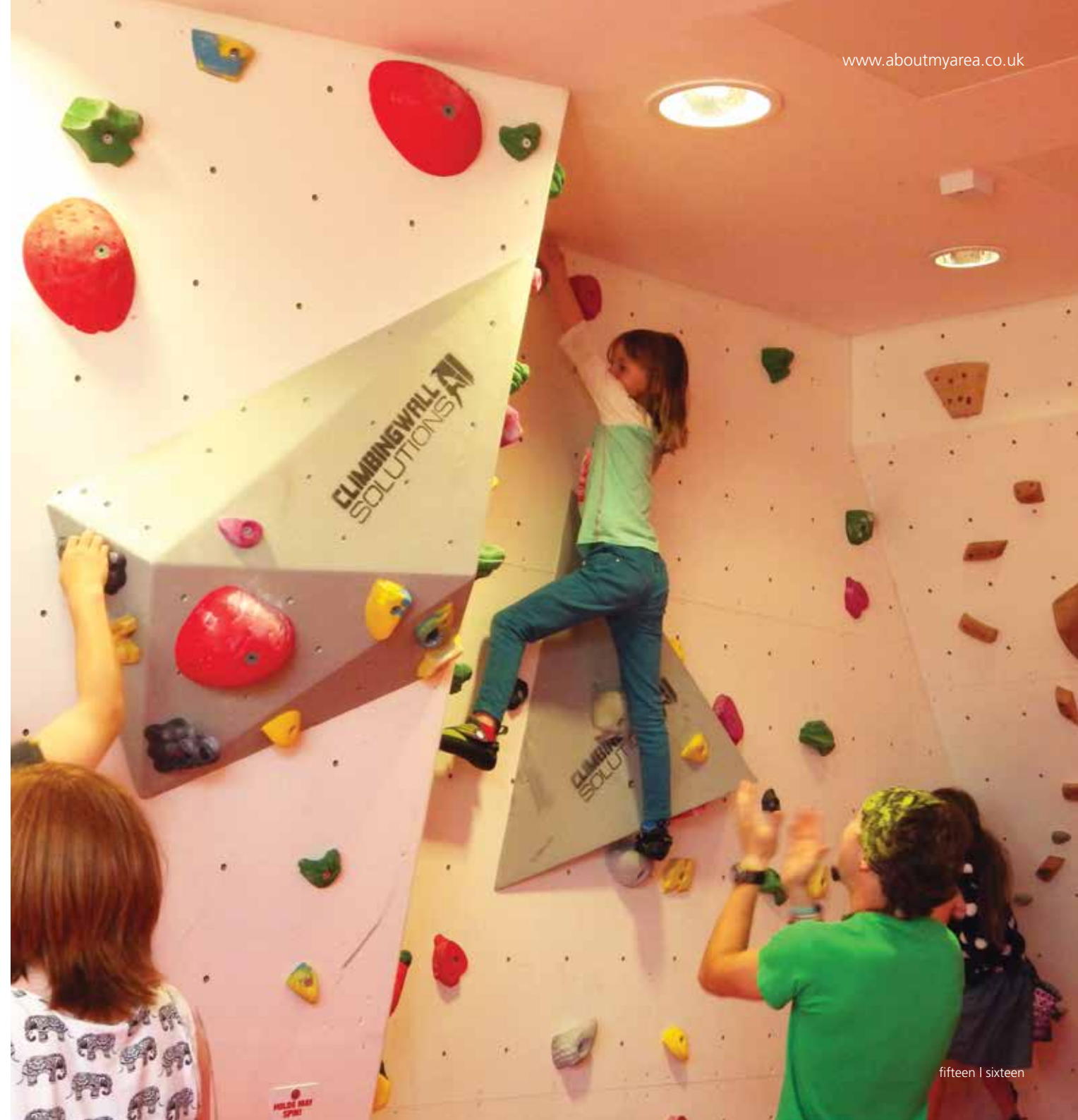
Somerset has a significantly higher number of admissions to hospital for self-harm than national averages, and the number of young people accessing mental health support services is rising.

These issues are just two of the most visible indicators that more must be done to give our next generation a better start in life. Local charities and voluntary organisations provide both preventative and recovery services to many of the most vulnerable children. In 2012/13 we awarded £125,456 in grants to such organisations. In addition we awarded over 50 grants up to £500 each from the Eagle House Trust Fund to assist young people leaving the care system, helping them in their personal development towards a fulfilling and enriched life.

Yeovil Opportunity Group is a voluntary specialist pre-school for children with physical, sensory, learning and communication difficulties. Not only do they provide essential support for the children in their development, they also give parents, many of whom will feel isolated and under considerable pressure, a place to meet others in the same situation while also providing volunteering opportunities and work experience placements for young people. Our grant of £5,000 has helped them to retain a specialist Child Care worker.

St Francis Holiday Club operates a holiday club for 6 - 12 year olds in the Sydenham Ward of Bridgwater, one of most deprived areas nationally. Not only does it engage the children, but it also helps parents and carers continue working through the holidays. Many of their volunteers are young people who previously benefitted from the scheme. Our grant of £1,000 helped make the activities affordable for the families on the lowest incomes, including many single parent families.

Minedhead EYE is a social enterprise, set up to combat the social exclusion many young people in rural areas experience. It is a place where young people can feel confident and safe, can have fun and learn. It includes a skate/BMX/inline arena, IT suite, media lab, recording studio, a cafe and many other things. Our grant of £3,000 has enabled Minehead Eye to fund equipment and provide 'taster' sessions to support its latest initiative, a bouldering wall.



THERE ARE AROUND 113,000 PEOPLE AGED OVER 65 IN SOMERSET TODAY, AROUND 21% OF THE CURRENT POPULATION. BY 2021 IT IS ESTIMATED THAT THIS WILL HAVE RISEN TO OVER 146,000. OUR COMMUNITIES ARE BENEFITTING IN MANY WAYS FROM THE TIME AND SKILLS THIS GENERATION HAVE TO OFFER, BUT AN AGEING POPULATION ALSO INEVITABLY NEEDS ADDITIONAL SUPPORT.

There are already an estimated 58,000 people (including 1 in 4 women aged between 50 and 65) providing unpaid care to family and friends, 12,000 of whom do so for more than 50 hours a week.

Many of the grants we award are targeted to relieve the isolation and loneliness many older people and their carers feel. In 2012/13 we awarded £160,021 in grants to such causes, including:

Accessible Transport West Somerset provides a community transport service to hundreds of the most vulnerable people in this district. The organisation sees its role as providing more than just a transport service, and in response to a growing demand it has established a new lunch and social club which meets weekly. We helped them establish this club with a grant of £3,450 while we also, separately, supported them with additional funding of £2,500 to cover the costs of escorts who help passengers during the winter.

The Blackdown Healthy Living Centre provides a range of health-related activities for people across the Blackdown Hills, particularly older people. Supported by its local GP practice, the team realised it needed to run different activities designed to reduce the impact of isolation on elderly people and help prevent or delay more serious health problems. Our grant of £1,550 contributed towards the costs of starting up this project.

Carers Taunton and South Somerset provides a source of essential support (described as a 'life-line' by one of their members) to around 1,500 unpaid carers. It is a place to share experience and information with others who are in similar caring roles, alleviating stress and helping the carers remain effective for their own benefit and those they care for. Our grant of £5,000 will help them adjust to the impact of cuts from other funders and find more cost-effective ways of delivering their services.



SOMERSET IS ONE OF ENGLAND'S MOST RURAL COUNTIES WITH AROUND 50% OF THE POPULATION LIVING IN SMALLER MARKET TOWNS, VILLAGES AND HAMLETS. WHILE MOST PEOPLE IN RURAL COMMUNITIES ENJOY A HIGH QUALITY OF LIFE, RURALITY CREATES CHALLENGING PROBLEMS FOR A SIGNIFICANT MINORITY.

Access to vital services located in larger towns can be difficult, and it can be equally difficult for those services to reach smaller rural communities.

In 2012/13 Somerset Community Foundation awarded £76,757 in grants to break down geographical barriers and easing life for many of the most vulnerable people in our smaller communities, including:

Seavington Community Shop and Services is a community owned non-profit making village store and cafe. They host a weekly lunch club to almost 30 local residents providing free transport for those who need it. Our grant of £1,300 enabled them to update their equipment and employ a part time cook for 6 months to ease the pressure on volunteers and put a more sustainable programme in place for this essential service.

Shipham Community Car Scheme's volunteer drivers offer people from local villages without their own transport access to GP surgeries and hospital appointments or just to go shopping. On average they provide one trip a day. After they lost long-term funding, our grant of £600 helped underpin essential running costs for the next two years.

Little Otters in Otterhampton is the latest rural pre-school to receive a grant from us. They provide an essential start to local children's development, particularly for families who cannot travel further afield. However serving a small rural community means their numbers can fluctuate. Good quality pre-schools help sustain local primary school and attract and retain young families in rural communities. Our grant of £1,000 has helped bridge a funding gap to sustain their work.



RAISING ASPIRATIONS

In 2011 Somerset Community Foundation, with support from Ninesquare Trust, developed the Raising Aspirations mentoring programme for young people. In partnership with Crispin School, the Foundation formed the scheme engaging volunteers from local businesses and wider community. In the first two years of the programme, 74 mentors have been recruited and trained.

As the programme moves into its third year, Somerset Community Foundation is working with researchers from the University of East London to evaluate the impact of the programme. Over the course of a three year evaluation researchers are tracking students' aspirations and achievements approaching their GCSEs.

In order to ascertain the potential added value provided by the programme, any changes observed amongst the participants will then be compared with those occurring amongst a control group of non-participants over the same time period. Semi-structured interviews took place with both child and adult participants in the programme when they met at a BBQ at Greenbank Pool in July 2012. Subsequently, an Interim Report and Preliminary Finding from the evaluation were published in 2013.

Highlights from the Preliminary Findings include:

- 53% of mentees experienced some increase in their perceived skills and beliefs about what they could achieve. This is compared with 37% of matched controls.
- 48% of mentees experienced an increase in aspiration to continue their education over the course of the programme compared with only 37% of matched control participants during the same time period.*
- Mentees experienced a significant increase in their perception of the support they received from their family and significant others over the course of the programme. Matched controls did not experience this increase over the same time period.

“[My mentor] has encouraged me, but not in a forcing way. So I can choose if I want to and I do want to.”

+ + + + + + + + + + + + + + + +
Raising Aspirations mentee



of mentees experienced
an increase in
aspiration to continue
their education*

SURVIVING WINTER APPEAL

Winter can be a period of great stress and many people become withdrawn and depressed. Some of them face the choice between heating and eating, and many health problems associated with ageing are exacerbated by cold and damp housing.

The 2012/13 winter was one of the worst on record. Fortunately we were able to respond with the largest ever Surviving Winter appeal, raising just under £80k from donations, predominantly from people donating a part of, or their entire Winter Fuel Payment. This money was supplemented by £45k from the Warm Homes Healthy People Fund, a Department of Health fund to support local authorities and their partners in reducing death and illness in England due to cold housing in the coming winter.

Working with frontline partners including Age UK and Forum 21, we directly helped over 360 households occupied by older people struggling with the cost of simply staying warm by providing financial support.

In addition, the Warm Homes Healthy People Fund enabled us to support 30 projects ranging from transport groups to lunch clubs that provide essential help to over 2,000 vulnerable people each winter. In partnership with other charities, we ensured these organisations received training and had cold weather packs to distribute to those who needed them most.

Case study: “Mrs M is diabetic, has other health problems and lives on her own. She found this winter ‘hard going’ as her flat is very damp and cold. It has storage heaters, but the bathroom one broke down for four weeks over the Christmas period. She was worried about paying her electricity bill, but it gave her peace of mind when she was told that she had been awarded a grant.”

“...working with frontline partners...we directly helped over 360 households occupied by older people struggling with cost of simply staying warm...”



working in partnership

Maureen Whitmore,
High Sheriff of Somerset



below the radar visits

“We had a most interesting day meeting very committed individuals determined to help the West Somerset Community. Somerset Community Foundation is very successful at helping small local charities.”

+ + + + + + + + + + + + + + + + + +
Maureen Whitmore, High Sheriff of Somerset

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

As part of this programme, last year, we invited Dame ‘Steve’ Shirley, formerly the Government’s Ambassador for Philanthropy, to our Annual Celebration at Taunton School where she shared her life story and, particularly, her approach to philanthropy. The Raising Aspirations event held at Queens College was also part of this programme.

We have also begun a programme of Below the Radar visits, bringing small groups of fundholders and other stakeholders together with local charities, community groups and social enterprises in their area of interest.

As a result of these visits one fund holder has started to mentor the leader of a mental health support group in Chard, another has offered to promote Somerset Community Foundation to potential new supporters and two corporate fund holders have offered pro-bono professional support.

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

LOCALGIVING.COM

Localgiving.com is an online platform for small, local charities to set up a webpage and receive donations. This allows grassroots groups to grow their profile in the local community and lets donors search geographically for projects to fund.

In 2012/13 over 40 community groups in Somerset were recruited by the Foundation to set up fundraising pages on Localgiving.com. We ran three training sessions, the first at the Yeovil Innovation Centre sponsored by South Somerset District Council. Subsequent sessions at Strode College and the Albemarle Centre attracted 11 and 12 groups respectively.

In 2012, Localgiving.com ran a match funding campaign sponsored by the Office for Civil Society. The Grow Your Tenner campaign raised £1.3m for local charities nationally, and 52 groups in Somerset raised an outstanding £51,622. This is an average of £1k for each group involved.

The largest fundraisers in Somerset during Grow Your Tenner 2012 were:

- Wimbleball Sailability raised over £5k
- Minehead Amateur Theatrical Association Regal Theatre raised over £2.5k
- Long Sutton CoE Primary School Swimming Pool raised over £10k

To find out more contact Karen Collins on 01749 344949 or email karen.collins@somersetcf.org.uk.

Julie Matthews, WATCH Project says, "The Grow Your Tenner campaign has been a life-saver for us. In just a few weeks, we have received 38 donations which are worth over £750 and gained regular supporters as a result of the campaign. This money has proved crucial and timely, enabling us to meet a shortfall in our funding. The process is simple and there is little administration involved. This leaves us time to focus on delivering our services to the most vulnerable people in our community."

"I have learnt a great deal and it has given me the confidence to go back and talk to the organisation about strategy for fundraising"

+ + + + + + + + + + + + + + + +
Angela McKee, MIND in Taunton

On average
£1,000
was raised by
Somerset groups in
Grow Your Tenner
2012 campaign





“...from the start we were pleased to know that some of our funding was supporting an operation which related so closely to our core business.”

+++++

Matthew Minter, Haynes

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 and trusts.

| | | |
|--|---|--|
| <u>Angela Yeoman Fund</u> | <u>Hydrex Fund</u> | <u>Shoon Fund</u> |
| <u>Beacon Fund*</u> | <u>John and Celia Bonham Christie Trust</u> | <u>Sir John Wills Memorial Fund</u> |
| <u>C&JP Fund* **</u> | <u>John and Dorothy Ball Fund</u> | <u>Somerset Fund for the Deaf and Hard of Hearing*</u> |
| <u>Christopher and Heather Virgin Fund</u> | <u>King James Exhibition Trust</u> | <u>Somerset Giving Fund</u> |
| <u>Christopher Tanner Memorial Trust</u> | <u>Long Sutton House</u> | <u>Somerset Grassroots Grants Fund</u> |
| <u>Clarke Willmott Fund*</u> | <u>McGreevy Charitable Trust Fund</u> | <u>Somerset Guardians</u> |
| <u>Comic Relief</u> | <u>Medlock Fund*</u> | <u>Somerset Masonic Fund</u> |
| <u>Coventry Building Society**</u> | <u>Michael Samuel Trust Fund**</u> | <u>Somerset Restorative Justice Fund</u> |
| <u>Courage Family Fund</u> | <u>Millenium Fund*</u> | <u>Somerset Smoke Free Fund*</u> |
| <u>David Price Fund*</u> | <u>Myakka Fund</u> | <u>Summerfield and Tauntfield Fund*</u> |
| <u>Donald Lake Memorial</u> | <u>Norah Cooke Hurle Trust**</u> | <u>Surviving Winter Fund</u> |
| <u>Grassroots Grants Fund</u> | <u>Party Packs Fund</u> | <u>TS5C Healthy Living Fund</u> |
| <u>Eagle House Trust</u> | <u>Perry's Recycling*</u> | <u>WCS Pickford Trust</u> |
| <u>EDF Neighbourhood Fund</u> | <u>Peter Wyman Fund</u> | <u>West Somerset Relief Fund</u> |
| <u>Field House Trust</u> | <u>Philip Gibbs Fund</u> | <u>Yeovil Town FC Fund*</u> |
| <u>Grave Family Fund*</u> | <u>Pilkington Fund</u> | |
| <u>Hector Tanner Memorial Fund</u> | <u>Rural Fund</u> | |

* supported by Community First Match Funding ** established during 2012/13

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

THANK YOU...

Every year we are fortunate to have an ever-increasing number of people to thank for their generosity. Being a Community Foundation means that we both need and facilitate local support and we are always exceptionally grateful to everyone who gives to and through Somerset Community Foundation.

The support we receive from local trusts, our **Friends and Ambassadors** gives us the essential breathing space to develop new ideas like Surviving Winter or the Raising Aspirations programme. They give us the capacity to research local issues to better understand how we can increase our impact, find dormant trusts and create new funds. The funding we receive from the Philanthropy Fellowship South West enables us to work more closely with donors enriching their experience and inspiring new forms of support.

We would particularly like to thank all of our fundholders, whose generosity makes supporting grassroots groups possible. We would also like to thank **EDF Energy**, **Localgiving.com**, the **Ninesquare Trust**, **Somerset County Council**, **South Somerset District Council** for the partnerships we have developed this year, and to **Butler Tanner and Dennis**, **Cetsat**, **Clarke Willmott**, **Mercer Design** and **Taunton School** for your in-kind support.

Our third Surviving Winter campaign saw a further increase in scale and capacity thanks to the generosity of hundreds of people who donated to this cause and also to our delivery partners who make sure essential and vital support reaches older people most in need: **Age UK Somerset**, **Community Council for Somerset**, **Forum 21**, **Frome Selwood Rotary Club**, **Knightstone Housing**, **Mendip Community Credit Union**, **Mendip Citizen Advice Bureau**, **Rotary Club of Langport and Somerton**, **Somerset Care and Repair**, **Taunton Citizen Advice Bureau**, **Wincanton Live at Home**, and **Yarlington Housing Group**.

We would like to recognise the Somerset Guardians, local businesses who provide vital grant-making funding and support the day-to-day work of the Foundation: **Bardon Aggregates**, **Bhere Ltd**, **Brewin Dolphin**, **Golledge Electronics Ltd**, **Haynes Publishing**, **Holemoor Properties Ltd**, **Langdons Group**, **M5 Glass**, **Mulberry**, **Old Mill Accountants**, **Perry's Recycling**, **Poole & Co**, **Rathbones**, **Shepton Mallet Cider Mill**, **Smith & Williamson**, **Somerset Chamber of Commerce** and **SummerSet Associates**.

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.



strengthening
communities

Summary Financial Statement for the year ended 31 March 2013

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE)

STATEMENT OF FINANCIAL ACTIVITIES FOR THE YEAR ENDED 31 MARCH 2013

| | Unrestricted Funds
(£) | Restricted Funds
(£) | Endowment Funds
(£) | Total 2013
(£) | Total 2012
(£) |
|---|---------------------------|-------------------------|------------------------|-------------------|-------------------|
| INCOMING RESOURCES | | | | | |
| Incoming Resources from Generated Funds | | | | | |
| - Voluntary Income | 110,945 | 195,267 | 240,329 | 546,541 | 605,360 |
| Activities for Generating Funds | | | | | |
| - Fundraising | 10,703 | - | - | 10,703 | 19,026 |
| Investment Income | 913 | 93,942 | - | 94,855 | 85,136 |
| Incoming Resources from Charitable Activities | - | 136,712 | 88,574 | 225,286 | 431,105 |
| Total Incoming Resources | 122,561 | 425,921 | 328,903 | 877,385 | 1,140,627 |
| RESOURCES EXPENDED | | | | | |
| Costs of Generating Income | 65,110 | 7,316 | 10,676 | 83,102 | 99,908 |
| Charitable Activities | 73,940 | 489,636 | - | 563,576 | 528,643 |
| Governance Costs | 14,011 | - | - | 14,011 | 12,248 |
| Total Resources Expended | 153,061 | 496,952 | 10,676 | 660,689 | 640,799 |
| NET (OUTGOING)/INCOMING RESOURCES | | | | | |
| FOR THE YEAR BEFORE TRANSFERS | (30,500) | (71,031) | 318,227 | 216,696 | 499,828 |
| Transfers | 36,298 | (27,164) | (9,134) | - | - |
| NET INCOMING/(OUTGOING) RESOURCES BEFORE | | | | | |
| OTHER RECOGNISED GAINS AND LOSSES | 5,798 | (98,195) | 309,093 | 216,696 | 499,828 |
| Realised Gains | - | - | 22,498 | 22,498 | 5,457 |
| Unrealised Gains | 3,017 | - | 271,588 | 274,605 | 3,650 |
| NET MOVEMENT IN FUNDS FOR THE YEAR | 8,815 | (98,195) | 603,179 | 513,799 | 508,935 |
| FUND BALANCES BROUGHT FORWARD | 172,319 | 482,526 | 2,560,633 | 3,215,478 | 2,706,543 |
| FUND BALANCES CARRIED FORWARD | 181,134 | 384,331 | 3,163,812 | 3,729,277 | 3,215,478 |

SOMERSET COMMUNITY FOUNDATION (LIMITED BY GUARANTEE) Balance Sheet as at 31 March 2013

| | 2013
(£) | 2012
(£) |
|-----------------------------------|------------------|------------------|
| FIXED ASSETS | | |
| Investments | 3,260,010 | 2,605,182 |
| Tangible Fixed Assets | 137,600 | 144,385 |
| | 3,397,610 | 2,749,567 |
| CURRENT ASSETS | | |
| Debtors | 96,958 | 114,231 |
| Bank | 303,976 | 425,367 |
| | 400,934 | 539,598 |
| CREDITORS: AMOUNTS FALLING | | |
| DUE WITHIN ONE YEAR | (69,267) | (73,687) |
| NET CURRENT ASSETS | 331,667 | 465,911 |
| NET ASSETS | 3,729,277 | 3,215,478 |
| FUNDS | | |
| Unrestricted Fund | 132,662 | 128,356 |
| Designated Funds | 48,472 | 43,963 |
| Restricted Funds | 384,331 | 482,526 |
| Expendable Endowment Fund | 3,163,812 | 2,560,633 |
| TOTAL FUNDS | 3,729,277 | 3,215,478 |

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 2013. 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 2013 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 2013 and complies with the applicable requirements of section 427 of the Companies Act 2006, and the regulations made thereunder.

We have not considered any events between the date we signed our report on the full annual statements (1 October 2013) and the date of this statement.

Peter Haugh (Senior Statutory Auditor)
For and on behalf of Old Mill Audit LLP
Chartered Accountants and Statutory Auditor, Bishopbrook House,
Cathedral Park, Wells, Somerset, BA5 1FD
(18 October 2013)

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 – 30 September, 2013.

SOMERSET COMMUNITY FOUNDATION

President

Lady Gass, Lord Lieutenant of Somerset

Vice-Presidents

Maureen Whitmore (The High Sheriff of Somerset) * Lord Cameron of Dillington * Richard Case CBE DL * John Cullum * John Edney * Michael Fiennes * David Fothergill (Chairman, Somerset County Council) * Brigadier Hugh Pye OBE, LL.D, FRSA * Angela Yeoman OBE DL

Chairman

Peter Wyman CBE

Trustees

Katherine Armstrong* * Claire Blackburn* * Dr John Bowman CBE
Charles Clark * Chris Davies CBE* * Sir Michael Ferguson Davie Bt*
Paul Hake * David Jenkins * Martin Kitchen * Jane Lock
Andy Palmer * Mark Saxton * Stuart Thorne

*Many thanks to these trustees who are retiring in November 2013

Staff

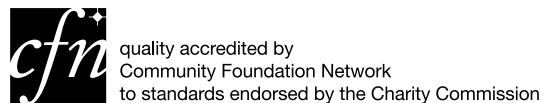
Chief Executive Justin Sargent

Deputy Chief Executive Mary Hancock

Programme Manager Jocelyn Blacker

Programmes Officer Karen Collins

Executive Assistant Lizzie Little



Contact Us

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

Tel: 01749 344949

Email: info@somersetcf.org.uk

Website: www.somersetcf.org.uk

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Somerset-Community-Foundation



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Somerset Community Foundation

Registered Charity No. 1094446

Registered in England and Wales No. 04530979

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