

Thriving Somerset Communities



Theory of Change 2021

About this document

As part of our strategy development work, Somerset Community Foundation (SCF) has taken the opportunity to reflect upon the needs of our communities, the opportunities for residents to drive change and our role as grant makers in enabling it to happen.

We believe that we can all change the world on our doorsteps. People help people. The connections we make in our communities support us and sustain us. Small amounts of money make big differences. This is why the majority of our funding is directed to grassroots organisations.

This has been particularly important in light of the coronavirus pandemic and its ongoing social and economic impact. It is important to us that our grant making remains relevant and that we are able to direct it to those communities that have the greatest need.

SCF has developed this Theory of Change to help to reflect on, learn from and improve our work in Somerset. This document sets out the context we are working within, the changes that SCF hopes to see in Somerset, our view about how these changes might come about, the external environmental factors that may affect this, and the specific contribution SCF can make.

SCF will use this document to guide our support to the VCSE sector. It will help us to review our work and understand how we are supporting progress. It will also be a way of stimulating new and interesting conversations with our partners, donors and the groups which we fund.

Throughout this document we consider the current context we are working in and the assumptions that underpin the approach we are taking. This Theory of Change is a 'live document' that will evolve over time as we learn more about the issues facing people in Somerset and our contribution to promoting change. New ways of addressing these challenges may become available to us and their separate theory of changes added.

Language is important and often terminology is used differently by different organisations or sectors. 'Communities' in this document is used both to describe local geographical areas as well as communities of interest. 'Partners' can mean stakeholders, donors and the groups that we fund, reflecting the way in which we operate and collaborate to create common goals and drive change together.

What is the change we are trying to bring about?

Theory of Change 2021

Our view of how change might come about



Our Vision
Our vision for Somerset is a place with strong communities where everyone has the opportunity to thrive

Long Term Goals

People feel supported within their communities
Everyone in Somerset is happy, resilient and confident in their own lives, and able to access support when they want and need it

Communities are connected
Somerset communities are cohesive, inclusive and well integrated. They understand difference and celebrate diversity.

People feel supported within their communities

- Strong personal support networks resulting from well connected, active communities
- Holistic support, which is available and accessible, enables individuals to have choice and control over their own lives

Current Priorities

Communities are connected

- A range of different activities taking place that reflect community need
- Different groups within a community working together
- People from across the community actively participating in groups
- Decision makers who represent the communities they serve
- An understanding of diversity across the community and opportunities to discover what people have in common

A thriving community sector in Somerset which has strong leadership, is financially healthy, well connected and able to meet the needs of the communities they serve

- Supporting community led ideas
- Policy and decision makers who reflect the communities they serve
- Collaboration across sectors
- Sharing learning and insights of community need in Somerset
- Collaboration between funders

The role we want to play

- Deliver more flexible funding, including awarding multi-year or unrestricted grants
- Help to strengthen the infrastructure of the community sector in Somerset and support collaboration

- Increase our grant making and expand our reach to enable us to award a greater number and more targeted grants into areas of greatest need; including more diverse communities and communities of interest
- Facilitate collaboration with and influence other funders, ensuring that we all serve Somerset communities more effectively
- Share insights and learning from our grant making and ensure they inform future planning
- Being innovative with our grant making, testing grant making approaches and methodology and sharing the outcomes
- Encourage and facilitate local giving and philanthropy

The context for our work in 2021

Somerset is a rural county. According to the 2011 census, 48% of people in Somerset lived in a rural area, compared to 18% in England as a whole. With a population density of 1.5 people per hectare, it is one of the most rural counties in the country. In the west of Somerset, the density decreases further to just 0.5, and over one third of Somerset council wards have a population density of less than 1. The rurality of Somerset is key to its beauty. The diverse geography, from the wilds of Exmoor to the dramatic north Somerset coastline, to the tranquillity of the levels and the beauty of the Mendip Hills, are key attractions for those who live here. However, the beauty of the landscape masks the challenges faced by those who live in rural areas. Roughly 40% of Somerset's population live in England's 20% most deprived areas for geographical barriers. Most 'Lower Layer Super Output Areas' (LSOAs) in the district are among the 20% most deprived in the country for barriers to housing and services. Government data for 2017/18 indicated that the number of children living in rural areas in relative or absolute poverty saw a noticeable increase¹. This includes towns such as Highbridge for example, whilst almost half the population of West Somerset lives in Minehead, Watchet and Williton. Small rural towns with populations of less than 10,000 face no less significant challenges than more dispersed populations. Somerset also has significant areas of urban deprivation across the county, in neighbourhoods such as Bridgwater, Taunton and Yeovil in particular which has increased in recent years. Here, 14.5% of children are living in poverty.

Rural isolation is an overarching issue which exacerbates other challenges. Loneliness, poor access to vital services such as GP surgeries, shops and banks, and significant barriers to opportunities for work and learning are all areas of need in our county. Statutory services are often based in urban centres, based on economies of scale.

Lack of access to transport is the most significant issue. In parts of Exmoor, for example, households are an average of 40 minutes away from their nearest food store and 50 minutes away from a GP. However, for a young person living in Martock, a mile outside Yeovil who needs to get to work for 9am there are equivalent transport challenges. There is a lack of public transport infrastructure with communities continually seeing bus services being taken away because they are not economical. The proportion of households without a car in Somerset is less than 1 in 5 in most of the countryside, although of course not all members of the household will have access to it at once. To add additional challenges, 88% of Somerset's roads are categorised as 'rural' compared with 64% in Great Britain as a whole. Community transport solutions are vital to meeting community needs, but often prove costly to provide and are dependent upon volunteers to resource.

¹ [Poverty - August 2019.pdf \(publishing.service.gov.uk\)](#)

Our situational analysis highlighted challenges, such as transport infrastructure, that go beyond the resources of SCF to meet. The Somerset economy is primarily based around small and medium sized businesses and tourism and hospitality are vital. Young people are more likely to be working multiple, seasonal jobs with lower pay, which combined with high housing costs, means home ownership is impossible for many young families. In fact, housing insecurity is an increasing need in Somerset, where official figures are not always able to capture the 'sofa surfers' or those facing risk of eviction, often at the mercy of private rental landlords who see opportunities to increase rent.

Coronavirus has exacerbated the needs of young people, with those aged between 16-24 having faced the biggest challenges in employment during the pandemic. The lack of a university in the county and few adult education options has a further impact on the ability of our young people to progress. Providing the environment and opportunities for all to develop skills and access the career paths they aspire to has been a common thread during the work that we have done throughout this process, whilst the increasing challenges faced by young people such as county lines drug running need a coordinated approach to enable it to be overcome.

The low wage seasonal economy is a contributing factor to the increasing issue of food poverty which we were beginning to uncover prior to the pandemic. The work of food banks and other agencies during the coronavirus outbreak has shown that food poverty in fact cuts through our communities. We have heard reports of 'the revolving doors' of foodbanks before, particularly within communities that are dependent upon tourism. What we have learned over the last year is that whilst not categorised as low income or poor, there are many who lack financial resilience; many who were not able to feed themselves or their families and who were in fact hidden until mutual-aid volunteer groups provided a community support network that reached out to them.

This is particularly true of some of our older residents. There has been a rapid increase in the elderly population in the county. 90% of the growth since 2011 has been in the 65+ group, 25% of the population in Somerset. An ageing population faces its own challenges to health (physical and mental), loneliness and isolation. Fuel poverty also remains a significant issue and one that SCF has addressed through our Surviving Winter programme for the last 10 years. However, our delivery partners are now finding that the choice to eat or keep warm is not only one that is confined to older people. Increasingly, families are reaching out for help during the colder months.

Digital exclusion across the community has been thrown into sharp relief by the pandemic when, as a society, we have seen so much of everyday life and work move online. Those that lack digital skills and access to devices or high-speed broadband and mobile data are at risk of being left behind, often remaining hidden and isolated.

Somerset has an active VCSE sector although the geography of the county means that some areas are more cohesive than others, with better infrastructure. Rural

areas tend to be served by a wider network of smaller organisations. The NCVO Almanac reports that rural charities are a third of the size of urban ones. The emergence of a single strong CVS (community and voluntary support organisation) in the county has provided a focus for support but there remain areas where constituted groups are sparse and there is a need for community development. It is recognised that registered charities decline in number the more deprived a community is.

As we begin to come through the pandemic and look to reboot and rebuild, the needs that seem most prevalent are mental health and wellbeing. Many in our communities have been shielding or in lockdown for much of the last year, and even when people have emerged it has been a different world to step into. Isolation and loneliness have been faced by possibly all of us, in some form or another. There is, it seems more need than ever to be part of a community. A community to provide support, to provide services, to connect, to inform, a community that cares.

Whilst the last year has been turbulent, and whilst it has shone a light on many disparities in our society, it has also shone a light on the inherent strength of our communities. Mutual aid groups, charities, community groups, centres, friends, neighbours and businesses have stood up, stood out and stood together.

Now we look to the future.

What is the change we are trying to bring about?

Our Vision

Our vision for Somerset is a place with strong communities where everyone has the opportunity to thrive.

Long Term Goals

Through our situational analysis of the issues and needs of communities in Somerset that Somerset Community Foundation has the resources and expertise to address, we began to understand that there were common themes emerging; both in terms of what we do currently, and where we saw our role in the future.

These have been brought together into two areas of focus which summarise the long term goals of our work; providing access to networks, amenities and services and strengthening communities to promote integration and cohesion.

Long term goals are by their nature, long -term goals and something that we will strive towards. They are not goals that we expect to achieve on our own and are rather a shared vision that our work feeds into. It is therefore important to understand what external data sources can tell us about Somerset and the progress we are making towards these goals. We will ensure that we consider this information as part of our monitoring framework to help us to judge how our work is contributing to change.

We will be able to measure our contribution to this overall vision through monitoring the current priorities we have highlighted below for this theory of change.

What are we striving for?

1. People feel supported within their communities

Long-term Goal	How will we know it has been achieved?
Everyone in Somerset is happy, resilient and confident in their own lives, and able to access support when they want and need it	<ul style="list-style-type: none">• Data from public health; VCSE groups; mental health networks; children & young people's services and social care services• Sufficient statutory and non-statutory support structures exist

2. Communities are well connected

Long-term Goal	How will we know it has been achieved?
<p>Somerset communities are cohesive, inclusive and well integrated. They understand difference and celebrate diversity.</p>	<ul style="list-style-type: none"> • Government wellbeing and happiness data incl. but not limited to: personal and economic wellbeing; young people’s wellbeing measures; social capital in the UK; disability, wellbeing and loneliness; exploring loneliness in children; measures of national wellbeing • Personal wellbeing estimates in Somerset • Data sets relating to coronavirus and loneliness in addition to its impact on overall social impacts • Crime data including hate crime, violent crime and anti social behaviour.

Our Current Priorities

1. People feel supported within their communities

We want to see...	How will we know it has been achieved?
<p>Strong personal support networks resulting from well connected, active communities</p>	<ul style="list-style-type: none"> • People feel better connected to services, amenities and support within their community • Increased number of personal success stories (e.g. seen through grant monitoring reports) • Increased number of people completing successful pathways through key support organisations
<p>Holistic support, which is available and accessible, enables individuals to have choice and control over their own lives</p>	<ul style="list-style-type: none"> • Community facilities exist/are active; have strong governance • Community groups covering a wide age group exist • Community activities are inclusive and have a wide reach • Increased support and services available to/within rural communities • Increased number of social support & services existing within Somerset (e.g. counselling, debt advice) • Services available according to community need

- Services and support reach all community members (inclusivity)

2. Communities are well connected

We want to see...	How will we know it has been achieved?
A range of different activities taking place that reflect community need	<ul style="list-style-type: none"> • An increase in activities that are led by the community for the community • Increased diversity of groups applying • Increased numbers of first time applicants • Increased percentage of groups led by the community they serve² • Increased number of projects indicating collaborative working • Increased level of participation in funded projects
Different groups within a community working together	
People from across the community actively participating in groups	
Decision makers who represent the communities they serve	
An understanding of diversity across the community and opportunities to discover what people have in common	

Our Assumptions

- Coronavirus and the economic consequences of the pandemic will continue to impact communities for the coming years as we learn to live with the virus as part of our everyday lives. This may mean direct health impacts and further social consequences of further lockdowns and social distancing. Economic challenges are likely to increase and the most vulnerable in Somerset will suffer disproportionately. People will lose jobs, their health and wellbeing and that of their families will suffer. The public sector is likely to become more and

² This may be a representative cross-section of a place-based community, or representation from community of interest eg minority ethnic communities, people with learning disabilities, young people, LGBTQ+

more stretched as it struggles to meet increased need across the communities in areas that are already under pressure such as adult social care. There is also likely to be an impact on philanthropy, as pressures are felt throughout society.

It is worth acknowledging however that the impact of these latter two is likely to be mixed. Giving can increase in difficult times, and the public sector can see the VCSE sector as a 'go to' with both funding and increased referrals. The importance of community during the last 18 months has been a reoccurring theme, and it is possible that there will be an increased interest in this as we move forward over the coming months. However, it is likely that we can also expect sophisticated appeals and stronger competition from national charities.

There will be increased pressures on communities that will test relationships and connections, whilst, conversely, strong communities remain vital in supporting everyone through hard economic and social times. The VCSE sector will continue to play an important role in providing formal and informal support structures. Funding will be important, but so will building connections between organisations, whether they are geographical or interest based. It is likely that those communities with the greatest need will be those with less developed infrastructures for support.

- Somerset will transition into unitary authority/authorities during the coming years which will preclude a period of uncertainty and transition for our communities, and the VCSE sector, particularly those larger charities that are dependent upon public sector funding. There may however be an opportunity to re-shape the VCSE sector and its relationship with statutory authorities.
- Somerset's ethnic minority communities have increased over the last 10 years and we await data from the census to fully understand the trends. The worker uplift at the Hinkley Point C project is likely to bring further migration to the area, although the modelling is currently focusing on 50% of the uplift number being comprised of home-based workers. Other large projects such as Gravity will cause additional changes to environment and communities.
- The VCSE sector in Somerset is primarily comprised of community groups with annual income below £20,000. These groups survive rather than thrive. Coronavirus will have impacted their resilience still further both through depleting reserves and the numbers of volunteers able and willing to deliver

services. Infrastructure and statutory agencies will have to work hard and work together to ensure that the sector is able to deliver the support communities need.

Priorities we continue to monitor closely

A number of focus themes were also identified through our situational analysis. Some of these we have begun to address recently such as homelessness. Others we are partly able to address through specific funding programmes, such as Surviving Winter. Our theory of change is a live document and it is our intention to add each issue as separate theory of change in collaboration with partners and donors as we have the resource to deliver funding programmes. This will ensure that we are responding to the external environment as it develops.

- Food Poverty
- Fuel Poverty
- Social Mobility
- County Lines and drugs issues
- Housing Insecurity

The assumptions we have made above are likely to amplify these issues in Somerset and we need to be ready to rise to the challenge of meeting them.

Our work and the sustainable development goals

In 2015 the world leaders agreed 17 Sustainable Development Goals (SDGs) which aim to create a better, fairer, world by 2030 – ending poverty, urgently addressing climate change and ending inequality.

SCF believes, in common with other community foundations, that our work aligns closely with many of these objectives. Inequality, poverty and injustice have no place in any community. Whilst we are committed to supporting all goals, we have identified those below as being most relevant to our work in Somerset

No Poverty Access to basic human needs of health, education, sanitation

Zero Hunger Providing food and humanitarian relief, establishing sustainable food production

Good Health and Wellbeing Better, more accessible health systems to increase life-expectancy

Quality Education Inclusive education to enable upward social mobility and end poverty

Gender Equality Education regardless of gender, advancement of equality laws, fairer representation of women

Reduced Inequalities Reducing income and other inequalities, within and between countries

Sustainable Cities and Communities Making cities safe, inclusive, resilient and sustainable

Peace, Justice and Strong Institutions Inclusive societies, strong institutions and equal access to justice

How do we think this change might come about?

Change can never happen in a silo. Nor can we, as funders, act alone. To see our vision of Somerset come to fruition we need to widen our perspective and work together with others across the county. These are the key factors we believe will drive change.

1. A thriving community sector in Somerset which has strong leadership, is financially healthy, well connected and able to meet the needs of the communities they serve

We believe that the community sector is vital. Pre-covid the sector was facing many challenges. The State of the Sector survey in 2020³ showed that 80% of those who took part were small to medium sized, and 33% had an income under £10,000. 37% worked very locally within their village or parish. The survey showed that although there had been an increase in paid staff from the previous survey of 2016 there remained a reliance on skilled volunteers. Before the pandemic, 67% of groups were citing an increase in demand for services and groups due to statutory cuts in funding. A third believed that the people accessing services or groups had more complex needs than before.

The strains placed on the resources of small groups, the lack of ability to generate income and the ongoing impact of the pandemic on a demographic of older volunteers have all left the sector looking even more precarious. Recommendations from the State of the Sector report pointed to the tendency of funders to ‘overlook core costs associated with project delivery,’ whilst “yearly funding cycles absorb organisations’ staff time and effort and weakens their confidence in a sustainable financial future.”

We identified in our theory of change of 2015 that one of the biggest areas we were able to impact was the sector itself through provision of local, grassroots funding and grants plus work. This belief remains and is a key driver for our strategy 2021-25. We have developed this further and are building in more opportunities for flexible funding, funding that supports unrestricted or core costs and is available over multiple years. It has also become more important to work with other infrastructure bodies and statutory services to serve the community sector better and champion its role in our county.

2. Supporting community led ideas

Our core business remains grants for grassroots groups, the majority of which are small and un-incorporated. They are run by the community, for the community and by providing the small amounts of funding needed to run local community spaces

³ [Somerset VCSE State of the Sector \(sparksomerset.org.uk\)](https://sparksomerset.org.uk)

and activities we continue to strengthen the connections between people and their support structures and empower them to be the change they want to see on the world on their doorstep. If we want to increase our reach into the community and seek out new community initiatives, it may include taking risks on the un-tested, trusting the un-tried and embracing the unknown.

3. Policy and decision makers who reflect the communities they serve

Sustainable change comes from the bottom up. Creating a place where everyone can thrive is a shared responsibility but in order to ensure that this is shared by everyone, we must provide opportunities for those who feel unrepresented to have their voice heard. No one should be left behind and no one should feel that they do not have the mechanisms or representation in places of power.

4. Collaboration across sectors

We have seen how successful collaboration across public, community and business sectors can be through programmes such as The Somerset Fund as well as some of the larger projects we have been able to award money to through the HPC Community Fund. Collaboration can mean shared resources, greater value for money and more sustainable change. Working to convene stakeholders throughout Somerset around relevant issues and opportunities is an important part of our work. Our partnerships with other infrastructure organisations and across the different local authority areas means that we can share best practice and amplify successes.

5. Sharing learning and insights of community need in Somerset

We believe in learning from the grants we are making and the intelligence we receive from the 400 groups we support across the county. We also believe in the need to respond proactively to what we hear, and to share it with other organisations, change makers and influencers. Together we can respond proactively to build a shared understanding and ownership of the difference we want to see.

6. Collaboration between funders

We know that deeper funder collaboration will improve the prospects of positive change, strengthen the sector and improve accessibility for the groups we support. We believe that potential risks associated with partnership working between funders such as additional bureaucracy, slow decision-making and 'group think' can be minimised as we focus on the benefits to the community.

What role should we play and what tools are at our disposal?

As the biggest Somerset based charitable funder we recognise that we have an important role in leading and delivering this change through the resource we have. Our Strategy 2021-25 reflects this role and this responsibility.

1. Deliver more flexible funding, including awarding multi -year or unrestricted grants

We know from our consultation with the community sector both before and during the coronavirus pandemic, that there is a need for funding in Somerset to be flexible and respond to the needs of the groups we fund rather than expecting them to frame their work to meet our requirements. We have worked with the majority of the groups we award grants to for many years and we know the importance of their work. What small groups often need most of all is unrestricted money to support their core costs in delivering the work they do so effectively. Most of all they need this over multiple years to provide security and the space to grow.

2. Help to strengthen the infrastructure of the community sector in Somerset and support collaboration

The infrastructure of the community sector in our county is stronger in some areas than others and has changed dramatically over the last year as mutual aid volunteer groups have developed across Somerset. We work closely with infrastructure partners such as Spark Somerset and Community Council for Somerset as well as with Public Health and other statutory bodies. Collaboration between key partners as well as with other funders is important in order to strengthen a sector which does not yet have the resilience to both manage the challenges they face in the present and look ahead to the future. Convening our partners and working together to address common agendas is an important role for the coming years, both to develop deeper understanding, and to avoid duplication.

3. Increase our grant making and expand our reach to enable us to award a greater number and more targeted grants into areas of greatest need; including more diverse communities and communities of interest

In order for us to work towards our current priorities we accept that there is a need to increase our grant making programmes in value which will enable us to award more grants. We also know that we may need to be more targeted with our grant making and identify those areas of Somerset in greatest need. These may be geographical,

but they may also be communities of interest. These needs will be driven, often, by the external context, and the monitoring of the external environment and exploring how it impacts our communities will be important to delivering this theory of change, as well as our wider strategy. We are aware that we are not currently working closely with many groups that represent our diverse Somerset communities, and in order to achieve our goals we need to challenge ourselves to do this more effectively, and in a more targeted way.

4. Facilitate collaboration with and influence other funders, ensuring that we all serve Somerset communities more effectively

We have begun to collaborate more closely with other local and national funders in the county and have recently begun a Somerset Funders Forum. We recognise this as a priority for the future and are seeking to explore big issues for the county within the group, as well as to address ways that we can reduce the barriers to funding that many in the sector feel they face.

5. Share insights and learning from our grant making and ensure they inform future planning

We recognise that we are able to glean a large amount of information from our grant making but have not always done this in the best possible way, or in the most productive way to enable knowledge sharing. We would like to continue providing our Hidden Somerset publication which highlights some of the unseen needs in the county however there will be other ways we can add to the shared understanding of the county and the information will inform future programme planning.

6. Being innovative with our grant making, testing grant making approaches and methodology and sharing the outcomes

Tried and tested approaches are not the only ones available to us and we recognise that in order to respond to changing need, and take into account changes in society, such as within the digital arena, we need to always be open to innovation. As we seek to reach new parts of the community and fund new ways of delivering change it is our hope that we will be able to test, develop and share new initiatives and methodologies. We seek to be an informed and open-minded funder.

7. Encourage and facilitate local giving and philanthropy

We are strongly placed to act as a catalyst for local philanthropy and encourage local giving to local groups. The community foundation message is a powerful one. We now have a Development Director in the SCF team who, alongside our CEO, advocates for local causes and local communities, allowing us to extend our reach and build collaborative working relationships between local philanthropists and the VCSE sector. In addition to specific funding programmes we hope to increase the value of our general funds for Children & Young People, Older People and Mental Wellbeing as well as The Somerset Fund which provides unrestricted and core funding grants.

Theory into Practice

These priorities and actions will now be operationalised and become part of a Monitoring and Evaluation Framework which will also speak to the IMPACT framework that has been launched by UK Community Foundations, our membership body who acts for all Community Foundations in the country. The framework will allow us to monitor our grant making more effectively and share learning and insights more regularly, helping us to understand how the work we fund, and the groups we strengthen contribute towards delivering our main goals, and changing the world on our doorsteps.

We do not wish it to be a dormant document, we will re-visit it according to the intelligence we glean from our grant making and our work with partners. We may also add to it if priorities we currently hold a watching brief on increase in their importance.

The process of developing a theory of change is more important than the product itself as it helps us to understand complexity. We will use it to demonstrate progress towards our final goals and our current priorities and to explain what's changed and why. However we recognise that the drivers behind social change are complex and non-linear, so theories of change are inherently limited in their representation of how change happens