



STRONG ROOTS, SHARED FUTURES.

Our 10-year strategy to build
community-led change together



The Growing Space

OUR VISION, MISSION AND VALUES

OUR VISION

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

OUR MISSION

We help passionate people in Somerset change the world on their doorstep by funding local causes and inspiring local giving and philanthropy.

OUR VALUES

- **We're here for everyone** – we embed diverse perspectives throughout everything we do and welcome and value the uniqueness in everyone.
- **We drive equity** – we work to better understand the needs, challenges, dreams and aspirations of **historically underfunded communities and take positive action to redress the balance.
- **We act with integrity** – we're transparent about how and why we do things and always do the best we can.
- **We lead with kindness** – we're supportive, compassionate and respectful to each other and everyone we serve.
- **We strive to be better** – we seek and reflect on feedback and insight, foster collaboration and share our learnings to get better results.

* By communities we mean communities of place, shared characteristics, interests and experiences.

** For us, historically underfunded communities are communities who are marginalised or otherwise disadvantaged due to background, geography or other socio-economic factors that we have historically underfunded. This includes, but isn't limited to, organisations led by and for minority ethnic communities, people with disabilities and people who identify as LGBTQ+, as well as people living in the most deprived neighbourhoods and isolated rural communities.

STRONG ROOTS THE BACKGROUND TO OUR STRATEGY

Our work always has been, and always will be, rooted in the people and places of our wonderful county. This strategy is born out of more than 20 years' experience and expertise working in partnership with hundreds of passionate local change-makers.

Together with donors, partners and funders who are dedicated to changing the world on their doorstep, we've awarded over £33 million of funding to thousands of inspiring local organisations working across our county.

At a time when pressure on the charities and community groups we support is greater than ever, we're committing to transforming the scale and impact of our funding. We'll raise the bar on local philanthropy and inspire more people from all walks of life to give locally – and give well.

At its best, local philanthropy is ambitious, courageous and nimble. It touches the hearts of generous people and reaches the heart of our communities. It sustains the most vital community work and is a catalyst for innovation. It moves swiftly when it needs to, but it is also patient and adapts to changing needs and opportunities.

Every day we meet bold and creative people at the heart of our communities, changing thousands of lives.

We know that our communities best understand the challenges they face, and are best placed to respond. They understand local needs that might be hidden to others and know how to unlock the potential on their doorsteps to create a better future.



Justin Sargent OBE DL
Chief Executive



Michael Samuel MBE
Chair

A stylized white signature of Justin Sargent on a dark green background.

A stylized white signature of Michael Samuel on a dark green background.

SHARED FUTURES OUR VISION FOR 2035



We've written this 10-year strategy recognising that deep-rooted, long-lasting change takes time and acknowledging the importance of stable, long-term funding.

It's our roadmap to building a more ambitious and impactful Foundation for our communities, not only in the coming decade, but for generations to come.

We believe local giving is most effective when it's directed by the communities we serve.

Through our work, we aim to build a more equitable society while understanding and acknowledging our limits. We can't change the systems that uphold inequality alone. But we can build a stronger civil society and help our communities define and create their futures.

To do this we'll:

- build long-term funds and hold them as community assets for today and for future generations
- use our funding to remove barriers to opportunity and help people to thrive where they are
- place equity at the heart of our funding practice, providing more support to historically underfunded communities
- be innovative in our approach and fund innovation that's scalable and replicable
- use our voice, insight and influence, working with others to create lasting change.

OUR GOALS FOR 2035

BY 2035 WE'LL:

- have built a much larger community of donors and partners and increased the scale and impact of giving through SCF
- have more than tripled our long-term funds that communities can depend on and that adapt to Somerset's changing needs
- be focusing more of our funding on historically underfunded communities and groups led by the communities we serve
- have built significant, flexible funding through our Collective Giving Funds that will support long-term funding programmes
- be using our data and insight to demonstrate the impact of local philanthropy and influence wider social change
- be making the most of technology to deliver better services to our communities, donors and partners.

Fusion Dance Circus Academy



REPORTING ON OUR PROGRESS

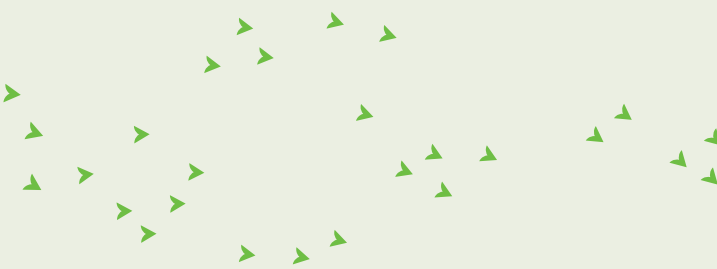
We know that our goals and objectives need to be flexible and adaptable to a rapidly changing world. So, alongside this strategy, we'll produce 3-year business plans that we'll regularly review to ensure our work remains dynamic, relevant and aligned to our long-term goals.

THINKING GLOBALLY, ACTING LOCALLY

In the past we didn't consider broader sustainability issues as much as we could have. We need to provide more support for communities to meet their environmental goals and reduce our own environmental impact. Plus, we'll align our impact reporting to the UN Sustainable Development Goals.



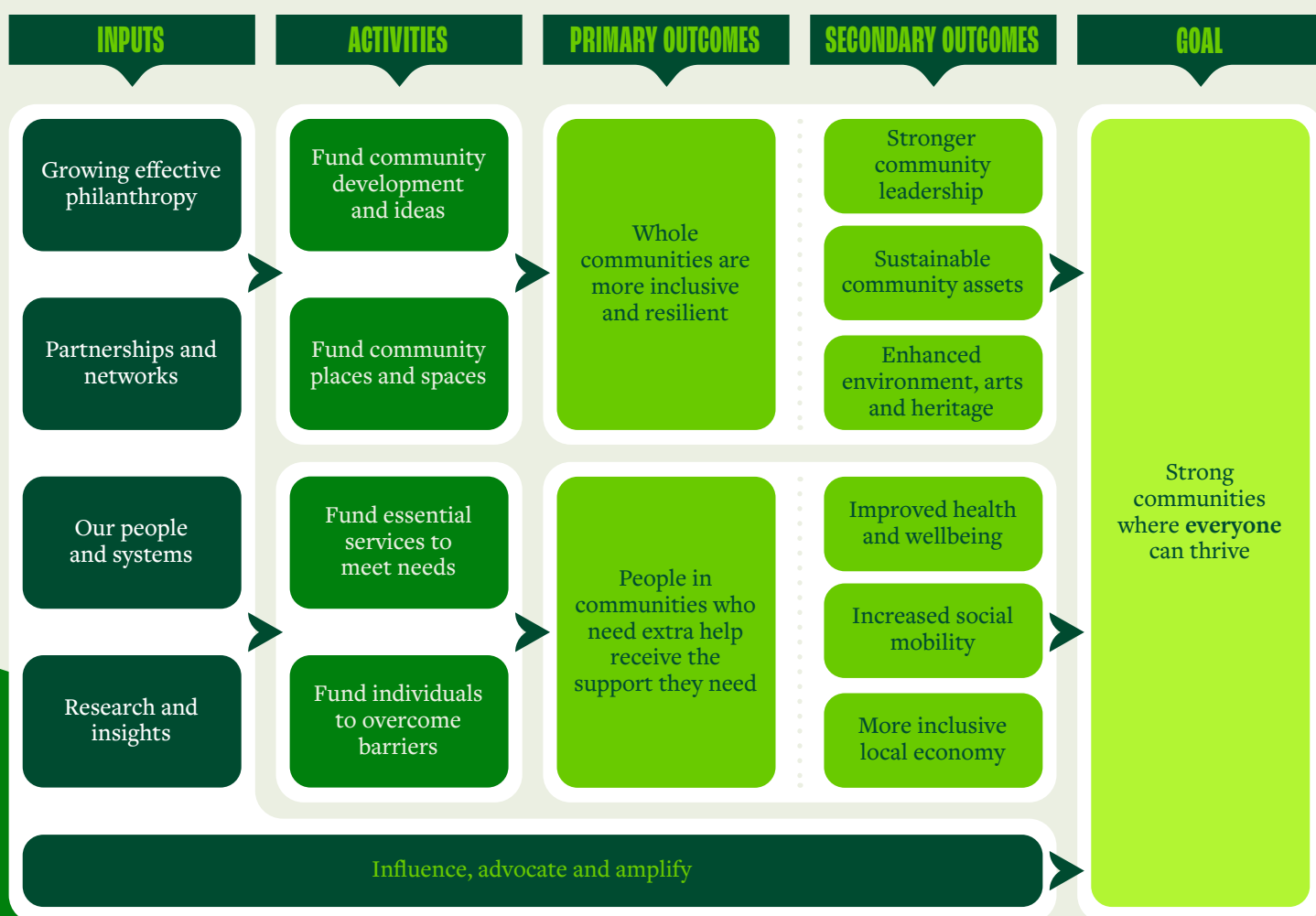
Pam Burrough,
SCF Fundholder



OUR THEORY OF CHANGE

Our Theory of Change is a practical guide for our work. It shapes how we design and deliver our programmes, ensuring that our efforts are directed towards building stronger communities.

It also provides a framework for reflection and learning by helping us to evaluate our progress, understand where we have the greatest impact, and identify where we need to improve. By returning to this roadmap, we can stay focused on our mission while remaining flexible and responsive to the changing needs of Somerset's communities.



OUR STRATEGIC GOALS

GOAL 1

Build a more equitable society by funding what matters most to different communities, underpinned by research and insights

We'll make this possible by:

- Supporting communities – particularly historically underfunded communities – to shape their own futures.
- Developing innovative approaches that help us extend and increase the impact of our funding.
- Supporting local organisations driven by the communities they serve, empowering more people to reach their full potential.
- Understanding the impact of our funding and sharing our learnings to get better results.

Ark at Egwood



We'll make this happen by:

- Doing more active outreach and targeted funding for historically underfunded communities.
- Expanding our social investment funding to help groups diversify their income and support innovation.
- Delivering thematic funding programmes that offer flexible, multi-year grants with more emphasis on funding core costs.
- Strengthening our approach to impact, evaluation and research to better understand the difference we're making and how to increase our impact in Somerset.

OUR STRATEGIC GOALS

GOAL 2

Build a larger and more diverse community of donors supporting Somerset today and for generations to come

We'll make this possible by:

- Growing our endowment to £35 million by 2035 by inspiring more gifts in Wills, trust transfers and individual philanthropy.
- Creating engaging and accessible ways for a more diverse group of donors to give, particularly through our Collective Giving Funds.
- Collaborating with other funders and public sector partners to build a more cohesive funding landscape, and using our resources to leverage more funding for Somerset.
- Developing more ways for our donors and partners to make an impact, for example through social and impact investment or expendable endowments.

Museum To You CIC



We'll make this happen by:

- Delivering a major Gifts in Wills campaign to inspire more people from all walks of life to give back to the people, places and causes they care most about.
- Engaging more professional advisers who collaborate with SCF to provide philanthropic advice to their clients and inspire more local philanthropy.
- Increasing marketing investment to reach and engage a wider audience, including next-generation donors.
- Strengthening our philanthropy advice services to inspire our donors to maximise the impact of their giving.

OUR STRATEGIC GOALS

GOAL 3

Harness our knowledge, insights and networks to influence and help others promote a more equitable society in Somerset

We'll make this possible by:

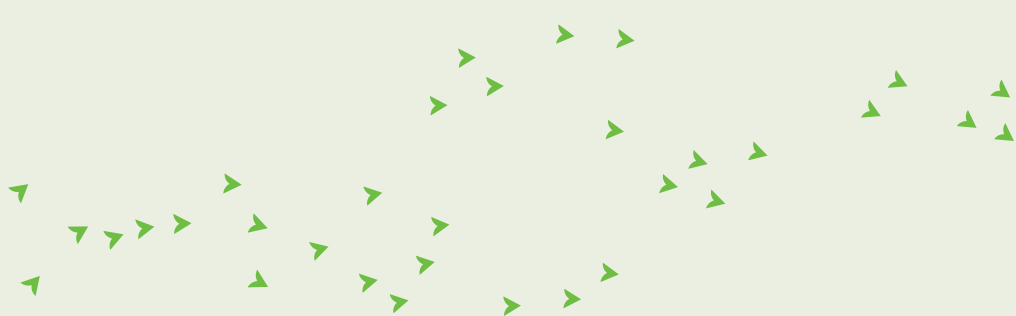
- Championing the vital role that communities play in creating sustainable social change.
- Promoting the importance of place-based philanthropy to enable community innovation and respond swiftly to emerging needs and opportunities.
- Researching local solutions to inspire philanthropy and direct our work, amplifying voices and experiences from our communities and local groups.

HPC Community Fund Networking Event



We'll make this happen by:

- Sharing data and insights from our funding programmes with philanthropists and funders, including through The Somerset Funders Forum.
- Using the power of storytelling to raise the profile of community-led change and place-based philanthropy.
- Collaborating with other community foundations and funders to develop a new field of research and practice in 'rural philanthropy'.



OUR STRATEGIC GOALS

GOAL 4

Achieve excellence in our governance and operations – ensuring our work is shaped by, and responsive to, the communities we serve

We'll make this possible by:

- Increasing opportunities for people from diverse backgrounds to shape our work and become an integral part of our story.
- Continuing to develop as an inspiring, inclusive and supportive workplace where our people can flourish, grow and give their best to our mission.
- Managing our financial assets to make the most impact possible, while stewarding them in responsible and creative ways.
- Embracing and leveraging evolving technology to enhance our efficiency and effectiveness, enabling us to provide better service to our donors and the organisations we fund.

Sedgemoor Playday



We'll make this happen by:

- Involving people from more diverse backgrounds to contribute their skills and experience to our work at all levels.
- Investing in more professional development for our staff and Trustees.
- Exploring alternative ways to manage our assets to increase our overall impact.
- Embedding a new Customer Relationship Management system, exploring AI tools and renewing our systems and processes to increase effectiveness and improve the quality of our service.

HELP US BUILD STRONGER COMMUNITIES IN SOMERSET

This strategy is about driving change with, not for, our communities. We can only succeed with the help of our many supporters and partners and the inspiring community leaders, volunteers and community members who make change happen every day.



Yeovil Together

HOW YOU CAN HELP

- **Engage** – Like and share our social media posts, forward our newsletters and share our research with people you know. Help us reach those with power and influence in our communities and beyond. This kind of support can hugely expand our reach and impact.
- **Amplify** – Tell local charities or voluntary groups about our funding and that we're here to help. We always want to hear from groups we've never funded before and many of those we fund hear about us through word of mouth.
- **Inspire** – Do your friends and neighbours know about SCF? What about your colleagues or employer? So many people still don't know we're here and how giving through SCF can make a difference on their doorstep. Your support to inspire more local giving could be truly transformational for our communities.

Thank you so much for your support and partnership. Together, we can change the world on our doorstep today and for generations to come.

Get in touch:

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