



COMMUNITY
FOUNDATIONS
FOR **LANCASHIRE**
& **MERSEYSIDE**

Our Strategy April 2023 – April 2026
To grow ***stronger communities*** together.

Our Vision

Our vision is to enrich the lives of people in Lancashire and Merseyside and through them develop and grow united, thriving and prosperous communities.

Our Mission

Our mission is to provide strategic grant-making that meets the needs of local communities, placing us as the partner of choice for philanthropists and funding partners, and the primary grant-maker for the communities we serve.

Our Strategic View

We understand the needs of local communities and donors and, by creating mutually beneficial partnerships, ensure that these needs are met. We help individuals and organisations give to causes that matter to them where there is most need and where it will have greatest impact.

The Context

As with all commercial and non-commercial entities the Community Foundations operate in an ever changing economic and political landscape. We work proactively to be fit for purpose and relevant to the communities in Lancashire and Merseyside.

Since the previous strategic plan period we have grown our endowment fund from **£16.4 million** in March 2019 to over **£20 million** in March 2023. This investment ensures a community legacy in Lancashire and Merseyside for future generations and is a significant contributor to our sustainability.

Our **Strategic** Objectives:



We will be informed by our community knowledge;



We will enable social change in our communities;



We will grow community investment for Lancashire and Merseyside;



We will be the 'go to' experts in strategic charitable giving;



We will continue to operate on a sustainable pathway;



We will continue to be commercially astute as a charitable entity;



We will work together with others for our communities and our network.

Our *Strategic* Priorities

1 We will be informed by our community knowledge

We will do this principally by:

- Using our Vital Signs findings from research and community consultations as our operating system for community philanthropy advice, grant-making and community leadership activities
- Using our bespoke issue based and area based research to inform and advise potential and existing donors plus key influencers
- Developing close relationships with community / charity leaders including a rolling programme of visits to see first-hand the community challenges and opportunities
- Actively seek relevant representation at panels i.e. individuals in the community with lived experience on a particular theme
- Presentations to the Board from community leaders
- Producing impact reports, outlining successes in community investment

2 We will enable social change in our communities

We will do this principally by:

- Providing a variety of types of grant funding for the broad spectrum of social sector organisations in our communities from community groups and charities to community businesses and social enterprises
- Encouraging sustainability, enterprise and innovation in our grant-making including more funding to ‘test and learn’
- Delivering funds for specific needs where there are gaps i.e. BAME community, Women’s funds, Refugees etc. ensuring our grants are diverse and representative of the local community
- Undertaking community consultations to identify local social priorities, concerns and aspirations
- Providing support for core activities as well as projects and pilots to enable organisations to be maintained and grow in their communities.
- Having a more diverse Board of Trustees

3 We will grow community investment for Lancashire and Merseyside

We will do this principally by:

- Engaging and working with companies, HNWIs, families, trusts, foundations and public sector bodies who are committed to their communities and wish to make significant donations
- Engaging and working with professional advisors to raise awareness of giving opportunities for their clients, including the tax benefits of giving
- Offering accessible ways to give to communities via the Community Foundations as an effective broker, recommended by the Charity Commission
- Building endowment funds with those who wish to work as part of a collective and support current and future generations of communities
- Developing a body of ‘Ambassadors’ to promote and support the work of the Community Foundation
- An effective marketing and communications strategy to target key audiences and deliver on growth KPIs

4 We will be the ‘go to’ experts in strategic charitable giving

We will do this principally by:

- Offering insight, options and sound advice that adds value to donor engagement
- Recruiting team members who have exceptional interpersonal skills, credibility and a desire to deliver for donors and our communities
- Demonstrating unrivalled levels of professional service in every aspect of our work
- Ensuring our donors are able to give to causes that matter to them, where there is most need and where it will have greatest impact
- Developing and building on our reputation for emergency and crisis support
- Using resources to mobilise and respond to emerging social issues e.g. homelessness or cost of living crisis
- Being agile and responsive to emerging social issues and or donor priorities

5 We will continue to operate on a sustainable pathway

We will do this principally by:

- Maximising our endowment fund and investment performance under charity law for community legacy and our sustainability
- Operating in the most time and cost effective way, maximising the use of digital tools
- Operating with an expert core staff team and ad hoc additional specialist resources for efficiency and effectiveness
- Ensuring we bench-mark our administration costs / income and make sound investments for growth
- Development of Lancashire Investors in Community and Merseyside Investors in Community
- Articulating our value in order to protect our fee structure
- Ensuring a financial surplus, based on a 3 year average

6 We will continue to be commercially astute as a charitable entity

We will do this principally by:

- Recognising key drivers, motivators and challenges for current and potential donors
- Offering high standards in customer service, especially to our donors, grant applicants and funding recipients
- Tracking the performance of our Team against annual targets
- Maximising the use of the expertise of our Board with the formation of advisory sub-committees
- Undertaking proactive risk management
- Regularly reporting on our organisational performance to our stakeholders

7 We will work together with others for our communities and our network

We will do this principally by:

- Operating as Quality Accredited community foundation in the UK network
- Supporting neighbouring community foundations and geographies for local efficiencies and community foundation development for the promotion of community philanthropy
- Connecting communities that want to work together by developing geographical partnerships locally, regionally and nationally
- Working with national bodies such as UKCF, NET, NHS Charities Together
- Working with key infrastructure organisations and regional influencers i.e. VS6, Local Authority Resilience Forums, Lord Lieutenants, Metro Mayor

Our ultimate **aim** is to **drive** as much investment into Lancashire and Merseyside to **enrich** the lives of people in those areas, who are most in need, and grow stronger communities together.



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