

## **CFLM Strategic Overview 2016/17 – 2019/20**

**Our Purpose:** Our purpose as community foundations is to grow stronger communities together.

**Our Vision:** Our vision is to enrich the lives of people in and around Lancashire and Merseyside and through them create 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 charity of choice for philanthropists and funding partners, and the primary grant-maker for the local social sector.

**Our Strategic View:** We understand the needs of local communities and donors and, by creating partnerships and involving donors, ensure that these needs are met.

**The Context:** The Community Foundations operate in an ever changing economic and political landscape at this time. Due to this we work proactively to be fit for purpose and relevant to our communities as Lancashire and Merseyside's local community foundations. During our previous strategic plan period of 2013 to 2016 the Community Foundations made the successful transition from majority public funding to majority private funding to operate in a new environment and enhance our work as a philanthropy hub. We grew our joint endowment fund to £12 million by March 2016, having begun endowment building in 2007 with around £130,000, and this investment is a significant contributor to our sustainability as well as to ensure community philanthropy in Lancashire and Merseyside for future generations.

Our financial cycle aims to operate over a three-year period of a surplus, a break-even and a deficit year-end situation, balancing out over the three years to allow for moments in time when new donors join us, Appeals take place and existing donors wish to support communities. We aim from 2016/17 to ambitiously secure £2 million in new endowment donations a year with a minimum of £400,000 a year, working with new and existing donors who wish to support communities for the long term and also unlocking dormant and inactive charitable trust assets for the area.

**Our Strategic Objectives:** Our strategic objectives reflect the three key roles that form a community foundation in any country which are as a philanthropy facilitator, as a grant-maker and investor in the social sector and as a community leader as defined by CS Mott Foundation.

**Our Strategic Objectives in 2016/17 – 2019/20 are as follows:**

- 1. We will be informed by our community knowledge;**
- 2. We will enable social change in our communities as their local community foundation;**
- 3. We will grow community philanthropy for Lancashire and Merseyside;**
- 4. We will deliver as the North West's leading philanthropy hub;**
- 5. We will continue to operate on a sustainable pathway;**
- 6. We will continue to be business-like as a charitable entity;**
- 7. 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 annual Vital Signs findings from research and community consultations as our operating system for community philanthropy, grant-making and community leadership activities;
- From our Vital Signs findings especially prioritising support in communities for Education, Community Cohesion and Health & Well-Being for the next three years;
- Based on our primary donor advised fund interests prioritising children and young people as a beneficiary group and especially their health and well-being, including mental health.

### **2. We will enable social change in our communities via as their local community foundation**

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;
- Undertaking regular 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 to grow in their communities.

### **3. We will grow community philanthropy for Lancashire and Merseyside**

We will do this principally by:

- Engaging and working with companies, business people, trusts, foundations and families who are committed to their communities and wish to give back, especially with significant gifts;
- 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 support current and future generations of communities as a collective with the Community Foundations.

### **4. We will deliver as the North West's leading philanthropy hub**

We will do this principally by:

- Offering philanthropy advice based on a 'ground breaking' UK advising model for community foundations which is at least competitive with national charity and private sector offers;
- Celebrating philanthropy across the region via our stories and ambassadors;
- Offering education opportunities to Philanthropy Fellows and donors to enhance their giving for the benefit of communities.

**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 philanthropy;
- Operating in the most time and cost effective way, maximising the use of digital tools as appropriate;
- Operating with an expert core staff team and ad hoc additional specialist resources for flexibility;
- Ensuring our bench-marked administration costs and modest expenses are covered as a registered charity.

**6. We will continue to be business-like as a charitable entity**

We will do this principally by:

- Offering high standards in customer service, especially to our donors, Fellows, grant applicants and funding recipients;
- Tracking the performance of our Board and Staff Team against annual targets and strategic objectives;
- Regularly reporting on our organisational performance to our stakeholders and the general public;
- Undertaking proactive risk management, including via a Heat Map system.

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

We will do this principally by:

- Operating as Quality Accredited community foundations in the UK network;
- Supporting neighbouring community foundations and geographies for local efficiencies and community foundation development for the promotion of community philanthropy and communities;
- Developing and delivering geographical partnerships and foundations for communities wishing to work together for social growth;
- Contributing to relevant forums, such as VS6 and the Local Enterprise Partnerships, as their local community foundation.

***Our ultimate aim is to drive as much investment into Lancashire's and Merseyside's social sector to enrich the lives of people in and around those areas and grow stronger communities together.***

July 2016