Our 5 year strategy
2023 to 2028

Working together to ensure our communities thrive
Introduction

This five-year strategy is being published in 2023, in the midst of a cost-of-living crisis while still recovering from the social and economic challenges of the Covid-19 pandemic.

The Foundation has risen to these challenges, increasing our grant making year on year, and raising the funds we need to do so, despite the difficult economic climate.

From 1999 - when the Foundation was set up – to the end of 2022, we have distributed over £60 million to over 4,000 organisations and 8,000 individuals. The money for those grants has come from donations we have spent in year, plus the income from over 100 active grant-making funds, which we have invested and manage according to our donor’s wishes.

We continue to learn from and build on our experience. We know our county and we are determined to expand our efforts to ensure that Cumbria is a place where needs are met, and everyone can reach their potential.

This strategy sets out how we will achieve our ambition over the next five years to 2028. It reflects the views of over 200 stakeholders who helped us determine our priorities. We will be refining our grant making, growing the funds we have available for distribution, and increasing awareness of the work we do.

We will continue to work with and fund the community groups who deliver such outstanding work on the ground in all corners of our county. Our preferred aim is to build programmes of work that get to the root causes of issues in our communities. We want to avoid sticking plasters where possible. We want long term, sustainable solutions.

Our grant making has evolved over the last few years as we increasingly work in partnership with other organisations and charities, as well as our amazingly supportive fundholders, donors and philanthropists. We want to build on and expand that partnership working – the more we work together to harness our resources, the better the outcomes for all.

We also want to expand our work with individuals and businesses who want to give back to their community – during their lifetime, or as a legacy. We have many ways of making the most of everyone’s giving in an effective, tax-efficient manner. We plan to shout loudly about what we can do and how we can help, and to be the number one choice for philanthropy and giving in Cumbria.

We want to be sure that the grants we make are targeted to where they are most needed and to illustrate the need to potential donors and supporters. To expand our knowledge base, we are building a portfolio of detailed reports on the opportunities and challenges faced by our communities. Our unrivalled knowledge will underpin the work we do.

Our plans for the next five years are summarised over the following pages. They are ambitious and far reaching but we know our committed team of experienced staff are more than up for the challenge, supported by our enthusiastic Trustees and volunteers.

Talk to us about how you can get involved or how we can help. We’d love to hear from you!
Why do we do it?

Living in Cumbria has some serious upsides. A World Heritage Status landscape with good people who look out for each other. It can also be tough. Really tough. The beautiful landscape hides intense poverty and lack of opportunity. Two things that fuel each other. Cumbria has a strong history of community and people working together to face challenges. We exist to continue and build that community.

How do we do it?

Since 1999, we’ve been bringing people together. People who want to give their time, money and expertise to the place they call home. People who want to make our county stronger so everyone can meet the challenges they face and achieve their potential.

Our vision

Cumbria is a place where needs are met, and everyone can reach their potential.

Our purpose

We exist to bring people together to use their expertise, time and donations to improve the lives of Cumbrians and to make our communities stronger.

We’re grant making experts with a deep understanding of Cumbria

We do our research so we can ensure our grants go to where they are most needed

We encourage philanthropy by giving individuals, businesses and organisations a range of options to maximise their charitable giving
All of us – our staff and trustees – agreed these values together, and we embed them in everything we do.

- We empower people through sharing knowledge and expertise.
- We work with integrity and transparency.
- We listen, learn, and respond.
- We are passionate about creating positive and sustained change in our communities.
- We are ambitious, dynamic and effective.
- We work to reflect our communities’ interests.
- We embrace equity and diversity and treat everyone fairly.
- We are a good and rewarding place to work and volunteer.

These are the words that are of importance to more than 200 stakeholders when describing the Foundation.

- Generous
- Responsive
- Caring
- Inclusive
- Influential
- Pioneering
- Sustainable
- Fair
- Visible
- Progressive
- Supportive
- Forward
- Professional
- Engaged
- Innovative
- Relevant
- Active
- Impactful
- Empowering
- Connected
- Effective
- Local
- Valued
- Successful
- Dynamic
- Effective
- Fast
- Focused
- Transformational
- Different
Cumbria has a vibrant third sector. Over 6,000 charities and community groups work hard to address the issues that affect people in our county. Issues such as poverty, inequality, rural isolation, lack of opportunity, poor mental health, all of which have an impact on individuals and the wider community.

Those charities and community groups need financial support to provide their services. That support needs to be consistent and reliable for them to be able to provide solutions for the long term. We plan to help by increasing the number of larger and longer-term grants. We will, where possible, help with their core costs to ensure they are able to function and plan for the long term rather than simply working from project to project.

We have proved with our work in Barrow during the pandemic that when charities and community groups submit a joint bid to work together, they form a powerful partnership that can be more efficient and effective. Each of those groups has their own expertise, but they are working to the common aim of improving the wellbeing of their communities. We will use that experience to encourage more joint bids for larger grants.

By 2028 we will have:

- Grown sustained long-term grant making.
- Reduced poverty.
- Improved quality of life.
- Built stronger and more resilient communities.
- Developed more powerful partnerships.
- Achieved annual grant making of at least £6 million.

Our strategic priorities

› Create positive and lasting change through our grant making

To achieve our aim, we will:

- Focus on improving lives and strengthening communities.
- Understand community needs and address the root causes.
- Increase the number of larger and longer-term grants.
- Collaborate with other funders, donors and organisations to build better targeted programmes.
- Support essential charitable and community organisations to become more resilient.
- Be ready to respond to new and emerging needs.

We have also shown that building programmes of work such as the Transforming West Cumbria social investment programme helps focus support where it is most needed. Funded and developed in partnership with Sellafield Ltd, it encourages a collaborative approach and supports joint working by charities, community groups and organisations. We plan to expand our partnerships and targeted programmes across the county, and we hope to continue working with the organisations and partners who have put their trust in us to deliver programmes for them. By working together, we can increase the impact of our grants and ensure they reach where they are most needed.

To support that work we have increased our research capacity. Our Transforming West Cumbria programme grew from the research we did on the opportunities and challenges in West Cumbria, and we plan to replicate this in other regions across the county. This research will help us to understand community needs and address the root causes, and give us the evidence we need to focus on improving lives and strengthening communities.

As well as research evidence, we will also increase our engagement with those who benefit from some of the grants we make. Incorporating lived experience into our grant making will help ensure communities’ needs are addressed in a way that works for them, rather than programmes being imposed on them.

And while we build our programmes, we won’t forget our roots. We know the big difference that a small grant can make to a community organisation delivering services in isolated areas.

We know there will be future urgent needs to be dealt with, and we will be ready.

Cumbria is a proud and resilient county. It has had to be. As well as the day-to-day issues faced by our communities, we have had to deal with pandemics and floods. The Foundation has become the focal point for helping the county back on its feet. Launching appeals and distributing grants quickly and effectively.

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To be able to respond to the needs in our communities we want to expand our grant making and our programmes. To do that, we need to grow the funds that we have available to distribute. The key role of community foundations is to support people in need by promoting local philanthropy. At the start of this five-year strategy, we are managing 116 grant-making funds, which have been donated to the Foundation by individuals, businesses, and charitable trusts, to address different issues across the county. The bulk of those funds are invested, and, at the start of 2023, we hold an endowment of over £26 million. That endowment gives us longevity which gives confidence that we are here to support communities for the long term. But the need is acute and there is always more we can do. The more supporters and philanthropists we attract and inspire, the more grants and programmes we can deliver. Over the next five years, we will be working to grow that endowment to at least £40 million as well as working with donors who want to make a more immediate impact by spending their donations in the year they donate it.

By 2028 we will:

• Be the first choice for philanthropy and charitable giving in the county.
• Increase awareness of our work.
• Grow our endowment to at least £40 million.

When we first started to consider our plans for the next five years, we asked a wide range of stakeholders – fundholders, members, community groups, grant recipients, representatives from local government and other Cumbrian organisations etc - for their views. Our stakeholders are rightly proud of their association with the Foundation and the work we do, but the point most widely raised was that the work we do is not as well-known as it could be. If more people were aware, then more people may get involved.

We listened. We plan to make our communications more effective by increasing the resources we devote to them. Our website is a great showcase of the work we do, but we will develop it to better promote the services we can offer to those who want to give efficiently and effectively. And we will use our Cumbria Club and our events programme to further raise awareness of what we do – we will be shouting loudly in 2024/2025 as we celebrate the Foundation’s 25th birthday.

We look forward to working with new donors and supporters, but we also want to show our appreciation for those who have supported us over a number of years. Many of our fundholders, members and supporters are willing to increase their donations and participation in our work, and we want to encourage and acknowledge their commitment. They are great ambassadors for the work we do, as are our friends in financial and legal services across Cumbria, and we will increase our engagement with them all to encourage everyone to spread the word about how we can manage charitable giving for individuals and businesses.

And as well as giving in life – which we always encourage so that people can see how their money is making a difference – we will be promoting our legacy offering more widely. We want everyone connected to Cumbria to have the opportunity to give back to the county that gives them so much.

By 2028 we plan to be the first choice for philanthropy and charitable giving in the county. An ambitious aim, but we are up for the challenge.

Our strategic priorities

› Grow funds available for distribution

To achieve our aim, we will:

• Attract, engage and inspire more donors.
• Effectively manage relationships with our current supporters.
• Increase funds available for immediate and longer-term distribution.
• Increase awareness of what we do, and the services we offer.
We are one of 47 community foundations across the UK, and over 1,700 similar foundations around the world. We work with fundholders to provide a permanent, flexible and growing source of local charitable funding that will directly address the needs of Cumbria’s most vulnerable.

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