

Strategic Plan 2018-2021

1. Introduction

- 1.1. Quartet Community Foundation's (Quartet) Strategic Plan is important to us in identifying the purpose, direction and goals for the organisation. We have aimed to produce a plan that is clear at the same time as being flexible enough to respond to the changing global, national, local political and economic scenes which we see at the time of writing.
- 1.2. This Strategic Plan has been reviewed as part of our preparation for the new financial year with input from staff and Trustees at our Away Day in March 2018 and it was approved at the Board meeting in June 2018.

2. Executive summary

- 2.1. Our vision is of philanthropic funds supporting local communities forever.
- 2.2. Our mission is to take the lead in inspiring philanthropy in the West of England, growing an enduring fund that meets local needs and aspirations now and forever.
- 2.3. We believe that if we inspire local philanthropy, grow our resources and make best use of these to meet local needs and aspirations then we, alongside others, will build local communities that give local people the best possible chance to fulfil their potential now and in the future.

- 2.4. Our Theory of Change details the social change we aim to affect:

Stronger, more resilient local communities where people are better able to organise and respond to the needs and aspirations of all who live there.

- 2.5. We will focus on four goals for the next three years:

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| Goal 1 | To continue to build Quartet Community Foundation's permanent funds as the basis for long term, sustainable local philanthropy at the same time as meeting immediate needs through efficiently managed flow-through funding |
| Goal 2 | To inspire more local philanthropy using our in-depth knowledge of local needs and how financial and other support can most effectively make a difference |
| Goal 3 | To use our grant-making to respond to local needs empowering the most vulnerable people in our communities and acting as a catalyst for positive change |
| Goal 4 | As thought leaders in the community, to share our knowledge and the evidence of the impact of our work to inspire others and encourage partnerships and collaborative working. |

- 2.6. We will track progress through our detailed Operational Plan and report through our impact framework and through measuring key KPIs.

3. Background

3.1. Quartet was established in 1987 and serves a population of over 1.1 million people across the four unitary authorities of Bath and North East Somerset, Bristol, North Somerset and South Gloucestershire. It is one of the oldest and largest of the UK's 46 Community Foundations.

3.2. In the three decades since we were established we have given more than £44 million in grants which have helped transform the lives of hundreds of thousands of people here. We have built up an endowment worth over £27 million, made up of more than 250 funds, which is the cornerstone of our ability to make almost £3 million in grants each year to around 1,000 good causes.

3.3. Our Vital Signs reports, published each October, show that although the West of England can be a great place to live and work, not everyone here is sharing in the benefits of its vibrant, thriving economy and environment.

3.4. Vital Signs 2016 goes on to say:

“Our thirty years’ experience supporting our local communities tells us that early intervention and prevention work with vulnerable people works and saves money in the long term, but we see public sector funding ever more focussed on crisis and find ourselves in an increasingly lonely place supporting preventative work in the community.”

3.5. The climate will continue to be challenging for charities with a low growth environment, rising inflation, uncertainties surrounding Brexit and the ongoing flow of bad news stories about charities. Nevertheless surveys show that people are increasingly inclined to be philanthropic and value high quality advice to guide their giving.

3.6. We believe local philanthropy plays a vital role in supporting disadvantaged local people and we are committed to engaging our existing supporters and new donors to work with us to identify and support key preventative services that will stop problems from escalating further. We are also committed to strengthening our strategic partnerships with public, private and voluntary sector stakeholders to build the skills, capacity and confidence of our communities and strengthen the safety net for those in need.

3.7. Staff, Trustees and past Trustees play an active part in UKCF (the network organisation for the UK's 46 accredited community foundations). We contribute time and ideas to developing the network from helping to develop the philanthropy training programme and sharing our experience with other community foundations to collaborating on ideas about donor development and developing the shared database system.

3.8. Transparent, good governance is central to Quartet being trusted to look after people's funds and donations and also to being seen as an impartial, responsive grant-maker. Through our Committee structure, regular briefing sessions with fund holders and staff training we ensure that good governance is well integrated into our daily activities.

4. Organisational structure

4.1. Despite being an organisation with considerable reach and impact we endeavour to keep our organisational structure simple and transparent. As the organogram below shows, our Board of Trustees is our governing body and is supported by sub-committees and a team of staff and volunteers to look after the interests of our funders and grantees.



5. Vision, Mission and Guiding Principle

5.1. Our Vision, Mission and Guiding Principle are:

Vision

Philanthropic funds supporting local communities forever

Mission

To take the lead in inspiring philanthropy in the West of England, growing an enduring fund that meets local needs and aspirations now and forever

Guiding Principle

We believe that if we inspire local philanthropy, grow our resources and make best use of these to meet local needs and aspirations then we, alongside others, will build local communities that give local people the best possible chance to fulfil their potential now and in the future.

6. Theory of Change

6.1. In 2018 we developed our first Theory of Change (attached) which details the short and long-term goals our work is directed to achieving and the overarching social change we aim to affect.

7. Strategic goals

We have four strategic goals, detailed below together with the key associated actions.

Goal 1

To continue to build Quartet Community Foundation's permanent funds as the basis for long term, sustainable local philanthropy at the same time as meeting immediate needs through efficiently managed flow-through funding

Actions:

- I) **Permanent funds** – continue to ensure Quartet is operating in a financially sustainable way with strong governance and endowment building at its heart. Be alive to any opportunities to create endowment match funds and increase awareness of endowment options for developer contributions.
- II) **Flow-through funding** – seek to secure new revenue funding streams by building relationships with public sector funders and grant-making bodies that may have difficulty in getting funds to grass roots organisations efficiently or that wish to outsource this activity.
- III) **Corporate relationships** – continue to develop coherent services to engage and inspire businesses and their employees.
- IV) **Legacies** – develop new ways to work with Professional Advisers and individuals to raise awareness of the impact gifts in Wills can have on local people; continue to spread messages to existing supporters.
- V) **Profile raising** – continue to raise Quartet's profile to increase awareness amongst key potential donors.
- VI) **New types of funding** – continue to review our role in new types of funding such as social investment, social impact bonds and the use of technology and social media to facilitate giving.

Goal 2

To inspire more local philanthropy using our in-depth knowledge of local needs and how financial and other support can most effectively make a difference

Actions:

- I. **Inspire more local philanthropy** – communicate with and engage new and existing supporters. We will do this by:
 - Developing flagship projects where we identify an issue, devise (with partners) the strategic response which will make a significant difference to the problem and raise new funding to finance the activities resulting from the projects. In doing so we will remember that we are a philanthropy broker and will not extend our mission to become a high street fundraising organisation

- Ensuring existing donors and fund holders know they are valued, understand the good their donations do and are encouraged to do more through our revised engagement plan including a range of events and communications
- Broadening the pool of potential new donors and fund holders (directly and through professional advisers) and ensuring more people are moving through the pipeline to becoming fund holders
- Exploring new ways to reach next generation donors – from young people who may want to give from a much younger age than previous generations to people currently building and running businesses
- Developing our use of digital technology and social media to involve and better inform people, where this is cost effective.

II. **Knowledge** – collect, understand and disseminate information to widen and deepen our influence with philanthropists, charitable trusts, public sector bodies and the third sector. Our knowledge will come from:

- The annual Vital Signs reports – our key sources of information on changing social needs
- Collating and analysing our existing internal information on the issues facing communities and projects
- Analysing in depth the impact of our grants with reference to our Vital Signs reports and our Theory of Change.

Goal 3

To use our grant-making to respond to local needs empowering the most vulnerable people in our communities and acting as a catalyst for positive change

Actions:

- I. **Focused grant-making** – focus our grant-making on prevention, early-intervention and diversionary initiatives that reach those most in need in our communities.
- II. **Proactive and responsive grant-making** – run open, accessible grant-making programmes that respond to the aspirations and needs of people in our area of benefit. Continue to develop and review our grant-making, including:
 - smaller, responsive grants
 - larger, long-term strategic grants, particularly those that develop confidence, capacity and skills of local people and organisations
 - reaching and supporting groups that are “under the radar”
 - sustaining important services for vulnerable people that will never be self-supporting.
- III. **Raise awareness** – become better known particularly for our strategic, proactive grant-making.
- IV. **Information and knowledge** – continue to deepen our understanding of local needs and collate it in ways that make it easy to share with fund holders and other potential partners. We will also use our information and knowledge continually to improve our grant-making.
- V. **High standards** – be thorough, professional, transparent and consistent in all our grant-making processes.

Goal 4

As thought leaders in the community, to share our knowledge and the evidence of the impact of our work to inspire others and encourage partnerships and collaborative working

Actions:

- I. **Leadership in the VSCE sector** – convene, connect and support organisations to respond better to specific issues. Where appropriate, represent the sector and advocate for changes that support our priorities, ensuring we are equipped to deal with the spotlight being on Quartet.
- II. **Collaboration** – work with other funders to make the best, sustainable use of limited resources and as a catalyst to inspire giving.
- III. **Selective participation** – participate in initiatives where we can see a clear role for the difference philanthropy can make.
- IV. **Diversity and inclusivity** – ensure all aspects of our work reflect the communities we serve.

8. Evaluation

- 8.1. The effectiveness of our work will be tracked through:
 - KPIs relating to donor development
 - grant-making KPIs
 - the development of a new impact framework, drawing on our Vital Signs reports and our Theory of Change, through which we will analyse and report on the impact of our grant-making, philanthropy and community leadership work.
- 8.2. The SMT and all staff will also use the Operational Plan (derived from this Strategic Plan) to record steps taken to achieve the tasks in each goal so progress can be seen, sticking points noted and training or support given where it is required.

Theory of Change

We believe that if we inspire local philanthropy, grow our resources and make best use of these to meet local needs and aspirations then we, alongside others, will build local communities that give local people the best possible chance to fulfill their potential now and in the future.

