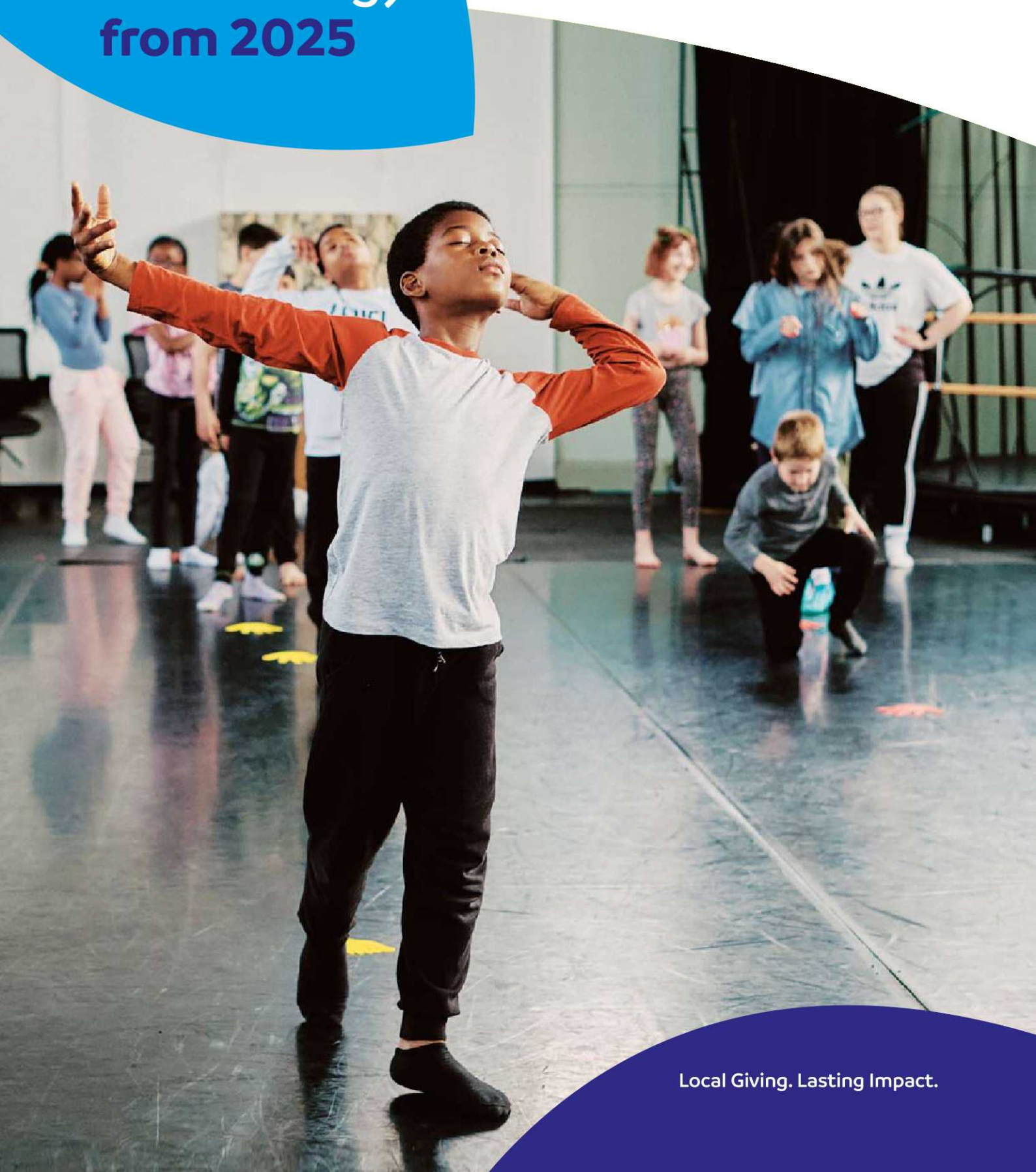




Community  
Foundation  
North East

# Our strategy from 2025



Local Giving. Lasting Impact.







# Introduction



**We're a charity that since 1988 has guided effective giving so people can change the world on their doorstep. Together with our donors, we have provided nearly £180m in funding to support causes across the region. We inspire philanthropy, invest in communities and influence change to build a thriving, generous and inclusive North East today and for generations to come.**

In setting our strategy from 2025, we've reflected on the challenges of the past five years – pandemic, inflation, global political uncertainty and more. We are proud of our achievements. We've increased grant-making and non-financial support for local charities and community organisations. We've mobilised resources around Covid, the cost-of-living crisis and poverty. We've grown giving and donor engagement. We've shone a light on issues through our Vital Signs research and heard from a thousand people in our On the Table conversations. And we've adopted a responsible investment approach to our endowment. But we are ambitious to do more, and to evolve our work so we better support the most effective community responses to our region's challenges.

We are honoured to have the trust of donors and partners who have built our £100 million endowment as a growing community asset for today and tomorrow, and whose generosity means we now provide funding of over £8m a year. Looking ahead, giving must remain at the heart of our work, ensuring that we grow the philanthropy available to benefit our region by bringing people and businesses from all walks of life together to make a lasting difference.

This strategy sets out how we'll do this, using all our resources towards our mission of building a thriving, generous and inclusive region. We've based the strategy on evidence, experience and listening to communities. It includes the measures by which we will judge our success and hold ourselves accountable. It is a strategy that will, subject to review each year, take us to at least 2028 when we will mark our 40th anniversary. But we have deliberately set some goals based on what we want to work towards by 2030.

The strategy also sees us adopt a refreshed identity – Community Foundation North East. While our roots are firmly in Tyne and Wear and Northumberland, our new name recognises that our donors, our funding and our research cover a wider area more aligned with that of the North East Combined Authority. But the change doesn't mean diluting current commitments. Instead, we will look to collaborate with partners who have complementary expertise and resources so together we can build thriving, generous and inclusive communities across the region.

# **Our vision**

A North East where everyone can be part of thriving, generous and inclusive communities.

# **Our mission**

To build a thriving, generous and inclusive North East today and for generations to come by inspiring philanthropy, investing in communities and influencing change.



# Our values

## Seeking to make a difference by

- sharing our love for the North East and wanting it to thrive
  - believing in the importance of giving and philanthropy
  - backing the brilliant work of local charities
  - championing disadvantaged people and less well supported causes
  - responding to the area's challenges and opportunities
- 

## Earning the trust of grantees and donors by

- starting where they are and encouraging their ambitions
  - being respectful, reliable and responsive
  - building lifelong relationships
  - applying sound judgement and knowing our stuff
  - staying independent and accountable
- 

## Getting better by

- sparking off and challenging each other across our organisation
- taking personal and collective responsibility
- learning from our successes and mistakes
- using outside knowledge and insights
- embracing diversity and treating people fairly
- having a healthy workplace and positive balance in our lives
- taking our work seriously but not ourselves



# Impact areas

**Our experience, research and community conversations have identified five regional challenges for philanthropy and funding to address so we can have thriving, generous and inclusive communities in the North East. While we will continue to connect donors to the causes they care about, for this strategy we will focus efforts on having an impact on these challenges.**



## **Tackle poverty**

Poverty in our region places households under stress, holds children back and leaves neighbourhoods behind. We want to help organisations meeting basic needs for food, shelter and services, those working to prevent people falling into poverty, and those giving a voice to the people it most affects.



## **Widen access to opportunity**

Our region has areas of growing prosperity but not everyone is getting the chance to benefit. We want to back efforts to raise educational attainment and skills, remove barriers to learning, training and jobs, and support home-grown talent and local enterprise.



## **Improve health and community safety**

Our region has worse physical and mental health than others. And we have worrying levels of domestic abuse, hate crime and anti-social behaviour. We want to support community interventions helping people and places at greatest risk. That includes healthy living activities, advice and advocacy, counselling, crisis intervention, and work on re-offending.



## **Strengthen culture and community life**

Arts, heritage, sport and community activities showcase our region, provide enjoyment and inspire change. We want more people to engage in culture for fun as well as for skills and opportunities. We want to support efforts to grow volunteering and participation. And we want to back organisations led by people they serve, and the vital community hubs in our towns, villages and neighbourhoods.



## **Sustain our environment**

Our region is vulnerable to climate change including extreme weather. We face a decline in biodiversity. And there are our everyday challenges like pollution and waste. At the same time our green spaces are key to what attracts people to live, work and visit here. So we want to help organisations addressing the local impact of these global environmental issues. We also support the transition to net zero through our investments and operations.





Through our strategy we will work with others to ensure the whole region is well served by effective philanthropy. But we will strive to have the greatest impact for communities who are most affected by the above challenges. That includes people and places less well served by charitable funding and those who face prejudice and discrimination.

To achieve our mission and address the five impact areas, our strategy has three pillars: **inspire philanthropy, invest in communities and influence change.**

# Inspire philanthropy

## Our aim

**We will be the North East's go-to place for philanthropy, engaging more people and businesses in giving money, time and expertise, and using our knowledge to ensure current and future donors have the most impact.**

### Why it's important

The UK is witnessing a decline in giving and the value of donations. But at the same time, charities need donors more than ever. We are proud of what we've achieved building on our region's tradition of generosity. Now we must keep growing giving, ensuring philanthropy adds value alongside what the public and private sectors do. Continuing to build our endowment as a community asset for today and tomorrow is at the heart of our approach. While our focus is gifts to funds, we also support those giving their time and skills pro bono.

### How we'll do it

1. Inspire and enable more people and businesses to set up and add to funds through lifetime and legacy gifts
2. Provide options for a wider range of people in the region to become donors by growing collective giving including via our North East Giving Network and North East Women's Fund
3. Build a network of people outside the region engaged in 'bringing opportunity home' through a Homecoming initiative and North East Roots fund
4. Expand opportunities for engaging business leaders and companies beyond funds e.g. membership, sponsorship, pro bono support and collective giving
5. Deliver excellent philanthropy advice and stewardship, giving donors opportunities to learn about and support effective responses to our impact areas, including through core and longer-term funding
6. Celebrate and demonstrate the impact of philanthropy enabled through our expertise and reach





### **What success will look like**

- Referrals and introductions from existing supporters and professional advisors
- Gifts added to endowment and philanthropic revenue funds
- Increased active relationships with businesses, professionals and diaspora
- Positive donor feedback and satisfaction rates
- Funds supporting all our impact areas including new funds being established

### **Key performance measures we'll use**

- Being on track to add at least £10m in new gifts to endowment by 2030
- Securing at least £1.5m through annual donor revenue funds
- Averaging 70% annual grant-making from philanthropic endowment and revenue funds (excluding third-party programmes)

# Invest in communities

## Our aim

We will harness more funding and support to have a long-term impact on the challenges facing our region's communities.

## Why it's important

Local charities and community organisations play a vital role in tackling the key challenges in our region. They do brilliant work with modest resources and are the catalyst for millions of hours of volunteer time. But they face increased costs and rising demand as well as greater competition for resources. We have a strong track record in supporting these organisations. But we need to strengthen their hand by providing more and better funding and by using our networks to lever more pro bono support.

## How we'll do it

1. Revise our grant-making policy and processes during the first year of this strategy so we can better support our impact areas and inspire our donors to provide more core and longer-term funding
2. Review how we best ask for and use feedback from funded organisations to understand our impact and inspire more donors
3. Encourage donors and partners towards more collective action, pooling of resources and increased discretionary funding to address our impact areas
4. Use our discretionary funds to address strategic issues, fill gaps and help lever in other investment to address our impact areas
5. Partner with other funders on programmes which add value alongside our philanthropic funds, ensure regional reach and target our impact areas
6. Develop training, networks and pro bono help, and work with sector infrastructure bodies, to increase resilience of charities working in our impact areas





### What success will look like

- Increase in our total grant-making
- Greater proportion of core/ longer-term grants
- Funding and support alignment with impact areas and geographic reach
- Scale and value of non-financial support brokered
- Evidence of our grants being successful against their aims

### Key performance measures we'll use

- Growth of annual grant-making towards £10m by 2030
- Leverage of third-party programmes worth at least £3m annually
- 10% minimum funding annually supporting each impact area
- Growth of core/unrestricted support to 65% of total awarded annually

# Influence change

## Our aim

We will shine a light on our region's challenges and use our knowledge and networks to champion actions which better address them.

## Why it's important

We are in a privileged position as an endowed foundation with a strong regional and national profile. So, we need to speak up about the challenges and opportunities in our area and give a stronger voice to those working to address them. By sharing data, publishing research and engaging with policy- and decision-makers in government and elsewhere, we can influence change so philanthropy and funding can do more to help our region thrive.

## How we'll do it

1. Over the strategy period, research and publish new editions of our Vital Signs reports on the region's challenges and opportunities
2. Provide fresh data about the scale and dynamics of the region's charities and community organisations through our 2025 Third Sector Trends study
3. Promote the findings of our On the Table community conversations and plan for an expanded programme in advance of our 40th anniversary
4. Build our influence with the North East Combined Authority and Mayor, local authorities and other public bodies around common agendas
5. Work alongside national philanthropy and funding bodies, including UK Community Foundations, to inform Government policy and practice relevant to our work
6. Collaborate with other funders and partners to support sector-led research and campaigns aligned with our impact areas





### **What success will look like**

- Evidence we're seen as a go-to organisation for knowledge and research
- Publication of up-to-date Vital Signs and Third Sector Trends research
- Audience engagement at events and with publications
- Evidence of our informing and influencing wider policy and decision-making

### **Key performance measures we'll use**

- 80% of surveyed donors, partners and grantees reporting that our policy and research initiatives are important

# Enablers

Underpinning our strategy are five enablers: the building blocks of how we will be effective as an organisation.



1.

## Governance

Ensure we are accountable, transparent and responsible.

How we'll do it:

- Maintain excellence in regulatory requirements and external standards
- Review our membership offer to encourage further engagement
- Review our risk appetite and approach in line with the strategy

2.

## People

Support an effective team and positive culture.

How we'll do it:

- Support professional development to ensure knowledge, skills and capacity especially on our impact areas
- Increase our development and marketing capacity
- Use diversity data to support recruitment so we better reflect communities

3.

## Operations

Use systems and technology to support efficiency and growth.

How we'll do it:

- Explore ethical use of AI to enable time for interpersonal engagement
- Embed project management to support delivery and change
- Capture and use data effectively to support operational effectiveness







4.

## Finance

**Steward our assets and invest responsibly for the long-term.**

How we'll do it:

- Review our fund cost contribution structure to ensure appropriate resourcing of our work
- Review cash holdings in line with our responsible investment goals
- Continue to explore ways to further our mission through investments

5.

## Communications

**Steward our assets and invest responsibly for the long-term.**

How we'll do it:

- Launch new name and refreshed brand, using the opportunity to engage new and existing audiences
- Deliver a new communications plan and help trustees, staff and supporters be effective champions for our work
- Build momentum towards celebrating our 40th anniversary in 2028

## Key performance measures we'll use

- 90% satisfaction rates among donors, grantees, staff and trustees
- 6% total return on our investments plus inflation averaged over 5 years
- Break-even operating budgets annually factoring in use of designated reserves

## What success will look like

- Recruitment and retention of a diverse and talented team of staff and trustees in line with benchmarks
- Expanded scope of reporting against our responsible investment objectives
- Better Health at Work, UKCF quality accreditation, Foundation Practice Rating, Cyber Essentials
- Adoption of AI policy and approach
- Annual clean audit
- Evidence of awareness among stakeholders and that they will recommend and promote us



## Find out more

If you'd like to learn more about our plans at Community Foundation North East, or discuss how we can support your giving, please get in touch.

## Community Foundation North East

Philanthropy House, Woodbine Road  
Gosforth, Newcastle upon Tyne NE3 1DD

**Tel:** 0191 222 0945

**Email:** [general@communityfoundation.org.uk](mailto:general@communityfoundation.org.uk)

**[www.communityfoundation.org.uk](http://www.communityfoundation.org.uk)**



CommunityFoundationNorthEast

Registered Charity No. 700510

Limited Company No. 2273708

Details of the Community Foundation's Privacy Policy  
can be found on our website.

Designed by Creo Comms.

Photo credits: BalletLORENT, West End Women and Girls Centre,  
Unfolding Theatre, Gilbert Johnston Photography, New Writing North,  
Company of Others and Creo Comms.

