



Foundation Scotland

Scotland's Community Foundation

Strategic Plan

2020 - 2030



Our vision is of confident, thriving, resilient communities across Scotland

Our purpose is to support communities to shape their future with the capacity and resources to deliver it

Our ambitions

Harnessing finance for investment into communities

Working at the heart of transformational giving

Ensuring our impact and learning informs practice, policy and creates new opportunities

Achieving excellence through our people, practice, and systems

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Foundation Scotland at a glance



We are trusted by over
300
communities



We are part of a global
movement of
2,000+
community foundations



Over
400
clients count on our
support



We have invested
£100
million
in communities since 1994



Over
3,000
grants are distributed
each year



We work with
60
decision making panels
across Scotland

1. Who we are and what we do

We are Scotland's community foundation. Our purpose is to support communities to shape their future, to work alongside them to develop the capacity and resources to deliver their future vision.

Our ability to combine knowledge, finance, and expertise to work with communities has supported young people into employment; tackled homelessness; reduced elderly isolation; grown community food projects; improved physical and mental health; and created community facilities, including village shops, energy schemes, community halls, green spaces, and a primary school. All contributing to lasting benefit.

A blend of knowledge, finance and expertise

This blend lies at the heart of what we do. We enable community finance to support the building blocks of a community – the varied groups, charities, organisations and enterprises. We focus on communities of place, and of shared interest.

We've been doing this for twenty-five years. We are trusted in hundreds of communities, from Shetland to Stranraer, from Portree to Dundee. Over 400 donors count on our services. To date we have invested £100million in communities.

Uniquely placed as Scotland's Community Foundation, we are part of a family of 50 such foundations in the UK, and part of a global movement of 2,000 foundations, each inspiring change in their communities.

As an independent funder we have the opportunity to think and act differently

- we test new ideas and ways of working; we can take risks which public funders often can't
- we take the initiative, alongside responding to immediate and vital demands
- we take a long-term view, not limited by short-term funding cycles
- we enable citizens to gather around a common vision and provide the resources to take action

As Scotland’s Community Foundation, we believe that for every community to thrive, communities are resourced to match their vision, powered by transformative funding. We champion this belief.

We have built up knowledge from many years working with communities, donors and other funders. We channel our expertise into strengthening community leadership and governance. We have know-how to provide guidance and support for funders, including philanthropists and companies. We enable them to develop their plans and to make real impact with their funding.

We believe community finance comes in many forms:

- Grant funding – a traditional mainstay of our role
- Endowments - we build long-term funds and adapt the model to enable communities to grow their own
- Dormant and obsolete charitable funds - we are a custodian, trusted to revitalise these
- Individual giving – we support personal and family philanthropy, including legacy bequests
- Loans and other social finance – we champion this approach, one which is gaining momentum

A strengths-based and inclusive approach

In programme design and decision-making we involve people with personal experience of their community and of the issues the programme seeks to address.

We are a trusted relationship broker, bringing together communities, donors / funders and finance. We engage with local, regional and national organisations.

We learn and grow from our successes, and from our mistakes. All these inform our practice and funding programmes. We gather stories of impact and assess outcomes against funding plans. We connect donors first-hand with funded organisations, and communities. This serves to underline and renew donor commitment, and share and celebrate achievements.

Our values

We make things happen

Being bold. We roll up our sleeves, find solutions and take action.

We never stop learning

Being curious. We keep learning and sharing what works and what doesn't.

We do the right thing

Owning it. We own our responsibilities, our decisions, our actions.

We meet you where you're at

Being inclusive. We show understanding and generosity.

We are open

Being transparent. We exchange thoughts and ideas.

We act sustainably

Investing in people and planet. We think long-term.

3. What we will deliver: Our ambitions and strategic objectives

We set out our 11 Objectives under 4 Ambitions below. Overleaf, for each objective we note its alignment with the UN Sustainable Development Goals [SDGs] and the Scottish Government National Performance Framework [NPF Outcomes].



	Ambitions		5-Year Objectives
1	Harnessing finance for investment into communities	1	Unlock and revitalise inactive funds
		2	Grow the range and value of endowment funds
		3	Integrate repayable finance within our funding programmes and support it to become more widespread in the social enterprise sector
2	Working at the heart of transformational giving	4	Engage in strategic approaches to giving
		5	Develop strategic partnerships with other funders
3	Ensuring our impact and learning informs practice, policy and creates new opportunities	6	Support community organisations to achieve their desired social, environmental, and economic change
		7	Use our knowledge and practical experience to provide a collective evidence base which evidences impact and improves practice and programmes
		8	Increase awareness, build our reputation, and deliver growth – to distribute more funding, improve current funding distribution and inform good practice and policy making
4	Achieving excellence through our people, practice, and systems	9	Attract, inspire, and develop high performing people
		10	Embed a culture of continuous improvement across all our systems and practice
		11	Become a sustainable organisation – from financial, social justice and environmental viewpoints

Ambition 1: Harnessing finance for investment into communities



3.1 Harnessing finance

Independent long-term funds are pivotal for communities, enabling them to be agents of their own change. We have supported communities on this journey. We will continue to grow our role as part of a wider system of support in Scotland.

As state funding is squeezed, we seek to generate more funds, to achieve our purpose and in line with our values. We know that substantial capital is locked-up within inactive charitable trusts, yet this can be released.

An endowment fund widens the assets of a community – like long-term savings, funds will support planned and/or reactive activity. Loans and other non-grant finance will help money go further, recycled finance for use by social enterprises and other communities.

	Objectives	SDG	SDG	NPF Outcomes
1	Unlock and revitalise inactive funds			We tackle poverty by sharing opportunities, wealth, and power more equally
2	Grow the range and value of endowment funds			We have a globally competitive, entrepreneurial, inclusive, and sustainable economy
3	Integrate repayable finance within our funding programmes and support it to become more widespread in the social enterprise sector			We live in communities that are inclusive, empowered, resilient and safe

Ambition 2: Working at the heart of transformational giving



3.2 Transformational giving

We see a difference between charitable giving – often supporting the status quo, and strategic giving – aiming to find solutions to change socio-economic situations for the better, and for the long-term.

Our services cover this spectrum, enabling donors to set-up funds under our single, governance roof. Donors, and other funders, are all welcome. They can choose charitable objectives, themes and places to fund in Scotland. Through engagement, we aim to guide and influence objectives.

Our big-picture purpose is to encourage and support developmental approaches in Scotland, working towards our vision of confident, thriving, resilient communities. We encourage donors to consider this approach.

	Objectives	SDG	SDG	NPF Outcomes
4	Engage in strategic approaches to giving			We tackle poverty by sharing opportunities, wealth, and power more equally
5	Develop strategic partnerships with other funders			We have a globally competitive, entrepreneurial, inclusive, and sustainable economy

Ambition 3: Ensuring our impact and learning informs practice, policy and creates new opportunities



3.3 Impact and learning

We learn as we work. And then we apply that learning to improve our practice, systems, relationships and decision-making processes.

We also take stock to share the knowledge, insights and impact our work is achieving in collaboration with others.

We plan to do this more. And in considered and intentional ways, to help drive positive change and development for people and communities.

	Objectives	SDG	SDG	NPF Outcomes
6	Support community organisations to achieve their desired social, environmental, and economic change			We are well educated, skilled and able to contribute to society
7	Use our knowledge and practical experience to provide a collective evidence base - which evidences impact and improves practice and programmes			We are open, connected and make a positive contribution We live in communities that are inclusive, empowered, resilient and safe
8	Increase awareness, build our reputation, and deliver growth – to distribute more funding, improve current funding distribution and inform good practice and policy making			We value, enjoy, protect and enhance our environment

Ambition 4: Achieving excellence through our people, practice, and systems



3.4 Achieving excellence

We will deliver our strategy against a backdrop of reducing global resources. To achieve our ambitions, we recognise we need to find new and innovative ways to deliver our services.

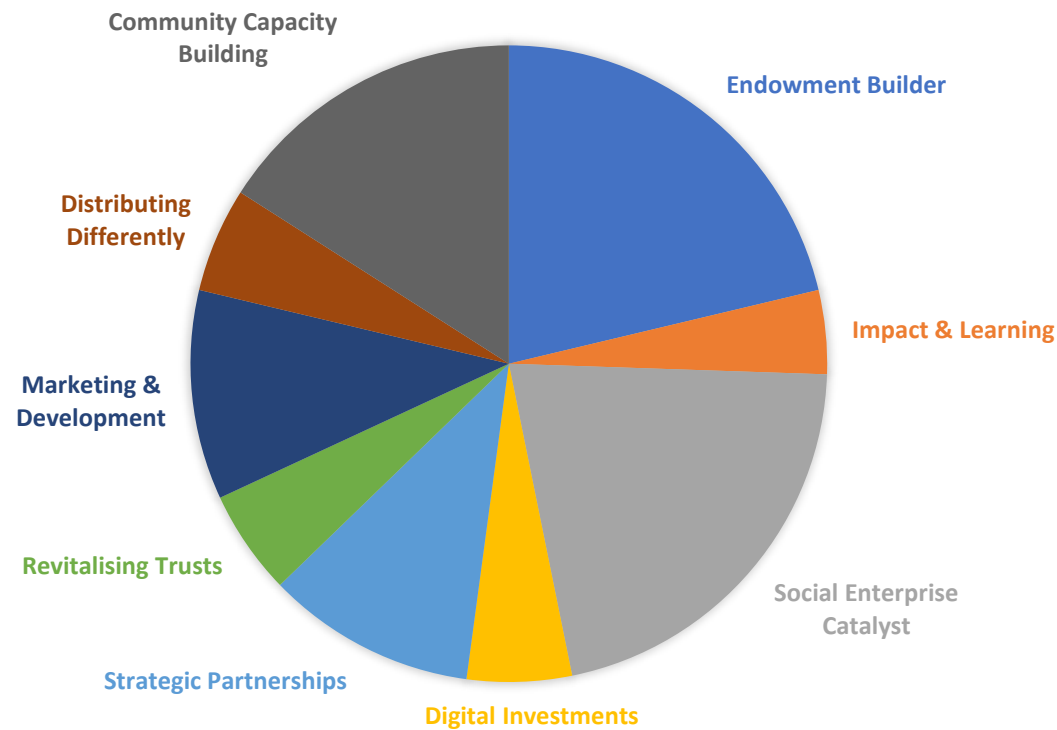
By operating sustainably, with engaged colleagues and efficient systems in an organisation that fosters a culture of continuous improvement, we believe we can deliver.

	Objectives	SDG	SDG	NPF Outcomes
9	Attract, inspire, and develop high performing people	 <p>8 DECENT WORK AND ECONOMIC GROWTH</p>	 <p>3 GOOD HEALTH AND WELL-BEING</p>	We have thriving and innovative businesses with quality jobs and fair work for everyone
10	Embed a culture of continuous improvement across all our systems and practice	 <p>12 RESPONSIBLE CONSUMPTION AND PRODUCTION</p>	 <p>9 INDUSTRY, INNOVATION AND INFRASTRUCTURE</p>	We value, enjoy, protect, and enhance our environment
11	Become a sustainable organisation – from financial, social justice and environmental viewpoints	 <p>11 SUSTAINABLE CITIES AND COMMUNITIES</p>	 <p>13 CLIMATE ACTION</p>	We are well educated, skilled and able to contribute to society

4. Our investment plan

To deliver this plan to 2025 we will invest £5million across our objectives. This is in addition to our business-as-usual financial base and is the largest investment in our growth during our 25-year journey.

Income and expenditure forecasts will remain focussed on the current and forthcoming financial year, because things change, and longer projections are soon out of date. Approximate proportions of our investment in various activities to accelerate delivery of our strategic objectives are shown below.



5. Governance and accountability

With record investment and stretch objectives, we will improve transparency and accountability in our progress and impact reporting. We will celebrate success, learn from our failures and be open about both.

Inside the Foundation

We have adopted strategy management software which will help us move from static annual objectives to a rolling and dynamic quarterly system. With a transparent online view, all colleagues can see how their development work fits in and supports the wider organisation objectives. Our Board has full visibility of our progress.

External Reporting

Our revised Impact Framework will enable us to improve reporting, based on progress against the indicators which each funded project selects. This will show specific impact, collated by funding programme. We recognise that we are a part of a much larger system, therefore we are aligning our impact measurement with the Scottish Government's National Performance Framework. And as part of a global network of over 2,000 community foundations, we are also aligning our objectives with the United Nations Sustainable Development Goals.

We are developing our systems and processes to enable donors, applicants, decision makers and fund holders to access 'real time' information about their funds, grants and investments.