

Our 5-year plan

from 2026



Two Ridings
Community Foundation



Our 5-year plan

Introduction

Community groups across our region are stepping up with extraordinary commitment. Even as demand grows and challenges become more complex, they continue to show creativity, resilience, and a deep belief in what their communities can achieve. Through careful listening, they've shared with us both the challenges they are experiencing and also the strengths and aspirations that are already shaping a better future.

Our 5-year plan builds on these foundations. It is a hopeful, community-led roadmap for the future. Shaped by the people who know their places best. A plan that strengthens what's working, supports what needs to grow, and invests in the conditions that allow everyone to flourish.

Our vision is simple:

communities where
everyone can flourish -
today, and for generations
to come

Our mission

is to inspire giving that
brings people together,
strengthens community,
and makes life better for
everyone in North & East
Yorkshire

We focus on what matters most to people



Tackling poverty

so fewer people have to
choose between
essentials



Improving health & wellbeing

so everyone can feel better
and live well



Building stronger communities

where people know each
other and feel connected



Championing equity & belonging

so no one feels left out or left
behind



Climate action

for our shared
wellbeing, and for future
generations

We are guided by our values

Rooted

We stand alongside people, strengthening
community in the places where they live

Inclusive

We listen and work together, creating
opportunities and reducing disadvantage

Accountable

We're open, honest, and committed to
excellence



Everything we do

is shaped by three
priorities

- ✓ Inspire & grow giving
- ✓ Fund & nurture community groups
- ✓ Champion community-led impact

And our commitment to being fair and green in every aspect of our work.



Inspire & grow giving

Why it's important

We want to provide sources of long-term flexible funding to support community impact across our region, in a context of growing need, rising costs and shrinking sources of income.

To do this, we need to provide donors and potential donors who want to invest in our region's community groups with compelling options for their giving. We also know that growing our endowment and attracting unrestricted donations are essential to our own ability to achieve our mission over the long term.

What we will do

Grow our lifetime and legacy income by:

- Nurturing our existing donors to encourage repeat giving
- Strategically building relationships with professional advisers

Grow our long-term flow-through income by:

- Increasing the number of long-term community benefit funds

Grow our short and medium-term flow-through income by:

- Securing new donors for our place-based and thematic funds
- Increasing the number of corporate sponsors

Grow our unrestricted income by:

- Increasing the number of corporate sponsors
- Exploring potential new strands to our business model



What success will look like

- Increasing the value of our annual grant-making year on year
- Retaining all existing long-term donors, with the majority renewing or adding to their funds
- Strong institutional relationships with targeted professional advisers, leading to new lifetime and legacy endowment fundholders
- Being a go-to partner for community benefit funds in the renewable energy field
- Growth of all our place-based and thematic funds, focused on our priority issues
- Increased giving by businesses with local and regional connections
- Endowment income covering an increased proportion of operating costs

How we will measure it

- A grant-making target of £2.5-£3m per annum by 2030 (currently c. £2m p.a), and a focus on increasing the funds available through our place-based and thematic regional funds
- Increasing the value of our endowment with a stretch target of £15m by 2030
- Increasing our long-term flow-through funds to enable distribution of £300k p.a. by 2030
- An effective donor journey, with excellent management of all funding relationships
- A year-on year increase in corporate sponsors



Fund & nurture community groups

Why it's important

Funding for community groups can have a transformative impact on the people and communities they work with, directly contributing to our vision and mission. Their activities contribute to tackling poverty, improving health and wellbeing, building stronger community relationships, championing equity and belonging and enabling action to improve our climate.

Investing in the development of leaders, and in networks and communities of practice which build skills and relationships, increases the effectiveness of community groups to make an impact on these challenges. We will take an approach of trust, openness and learning, focusing on small grassroots organisations.

What we will do

Strategically build our fund portfolio:

- Provide appropriate distribution of funds with increased relevance and responsiveness to local and regional needs

Provide flexible, unrestricted multi-year funding wherever possible:

- Increase the proportion of grants awarded as general or designated unrestricted
- Increase the number of multi-year grant commitments

Strengthen community voice and agency in our decision-making processes:

- More programmes designed by and decisions made with community participation
- Ongoing process of listening to the needs and opportunities that community groups are identifying

Expand and deepen our investment in leadership development, networks and communities of practice:

- Deliver Phase 3 of the HEY Confident Futures leadership development programme
- Increase the number of networking, advisory and peer learning opportunities available for grant applicants and funded groups



What success will look like

- Strategic and impactful portfolio of grant-making that contributes to a stronger ecosystem of grassroots and community-led organisations across our region
- A higher proportion of flexible, multi-year and unrestricted funding awarded, increasing year on year, resulting in longer-term outcomes from funded projects, and improved opportunities for development and sustainability among funded groups
- An increase in the number and range of people contributing effectively to grant programme design and decision-making processes, resulting in strengthened community capacities
- Simple, streamlined funding processes, built on a framework of equity, diversity and inclusion, that are user-friendly, accessible and flexible
- HEY Confident Futures Phase 3 evidences effectiveness across all impact areas and increased financial sustainability, complemented by drop-ins and piloting of communities of practice in other parts of the region.

How we will measure it

- Indicative allocation of funds: Community Funds 50%, Organisational Development and Capacity Building 25%, Thematic 20%, Response and Recovery 5%
- 75% of funds allocated to work supporting thriving communities, 25% allocated to urgent need/crisis response. Average applicant success rate: 50%
- All funds reviewed, and flexible adjustments made as feasible, with 85% of grantees reporting improved flexibility
- A larger proportion of grants are multi-year and/or continuation funding (proportion to be confirmed once baseline mapping is complete in 26/27)
- Strengthen community voice in decision-making, with 20% of programmes shaped by communities and 80% of decisions made by community panels
- HEYCF Phase 3 results in an expanded network of 500 leaders, 100 New To Leadership Alumni and contributions to organisational and sector effectiveness
- Well-attended and evaluated drop-ins and communities of practice



Champion community-led impact

Why it's important

Local community groups are often the ones making real change happen – but they don't always get the credit or support they need. We're in a great position to shine a light on their work.

When we show the real difference grassroots groups make, it inspires funders, decision-makers, and partners to get involved and invest in local solutions.

What we will do

Champion people and places

- Share at least 20 community stories each year – through blogs, videos, and case studies
- Run regular 'Meet the Person' features to spotlight individual journeys, 'Growth Journey' stories showing how our support helps organisations grow and connect to wider change, and 'Bigger Picture' content showing how all the groups we support together strengthen the social fabric
- Publish a bi-annual "State of Communities" report combining data, community voices, and local insights

Share what we're learning

- Use social media, blogs, and traditional media to spread the word about the value of community-led work
- Team up with local media outlets, influencers, and networks to reach more people
- Host events that showcase the work and impact of community groups

Grow our influence and reach

- Strengthen relationships with councils, combined authorities, and other key players
- Share insights that shape policy and unlock funding from both public and philanthropic sources
- Bring people together to respond to current issues and opportunities



What success will look like

- More people understand why investing in community-led work matters
- We're seen as a trusted voice on grassroots impact
- Community groups feel recognised and supported
- Partners invite us to share our insights at events and in conversations
- Media outlets come to us for stories and commentary
- Three new strategic advisor relationships are established each year
- More donors and partners work with us because they see the results

How we will measure it

- Growth on website sessions and social media engagement measured via analytics
- Growth of general newsletter subscribers using Opt In options within Salesforce
- Year on year growth in media coverage
- Well-attended events that attract key audiences and lead to new partnerships
- Evidence of active partnerships with councils, Combined Authorities, and business networks – with clear results in funding and support
- Client referrals from strategic advisor relationships



Enablers

Our five enablers are the core organisational activities that support delivery of our three strategic priorities

People:

Passionate, skilled and supported

Governance:

Transparent, robust and accountable

Finance & Investment:

Strong, sustainable and responsible

Digital Systems:

Efficient, responsive and agile

Communications:

Simple, relatable and impactful



People

People are at the heart of all we do. To support a skilled and engaged team, we encourage an inclusive culture that values diversity, supports professional growth, and promotes health and wellbeing.

What we will do

- Recruit and retain a diverse and effective team of staff and volunteers
- Invest in training and development
- Maintain and develop an inclusive culture
- Promote health and wellbeing

How we will measure success

- Staff retention rates and EDI statistics
- Retention, training attended, appraisal and wellbeing survey results
- Wellbeing survey results
- Absence rates, take-up of wellbeing offer

Governance

Strong governance inspires trust. A skilled and diverse board will ensure that our strategic decision-making is effective and transparent, the organisation is well-managed, that our work is contributing to greater equity, diversity and inclusion, and that we operate as a climate-aware organisation.

What we will do

- Recruit and support the retention of a skilled and diverse trustee board
- Maintain policies and uphold best practice
- Ensure regulatory compliance with Charity Commission, Fundraising Regulator and other external standards
- Improve and embed equity, diversity and inclusion (EDI)
- Develop our practice and commitments to being a climate-aware organisation

How we will measure success

- Board audit, EDI statistics, and trustee retention and engagement measures
- Successful retention of UKCF Quality Accreditation, policy reviews up to date
- Timely and compliant submissions to regulators
- Delivery of EDI accountability plans; Foundation Practice Rating self-assessment, showing continuous improvement
- Delivery of Funders Commitment on Climate Change annual accountability plans, showing continuous improvement



Finance & Investment

A sound financial strategy supports long-term grant making and organisational sustainability. We will invest and steward our funds responsibly to generate strong financial returns that avoid harm to the communities we support and contribute to a sustainable environment. Robust financial controls and processes will protect the charity's assets, manage risks and meet our regulatory and reporting responsibilities.

What we will do

- Deliver a sustainable return on investments to fund grant making, contribute towards operating costs and maintain the real value of our assets
- Explore new approaches to responsible and sustainable investing
- Maintain robust financial policies and procedures that are reviewed regularly
- Identify and manage financial risks
- Provide excellent financial service and reporting to all stakeholders

How we will measure success

- Investment performance meets or exceeds agreed targets and benchmarks, with average total return on investments of CPI + 5%
- Investment portfolios reflect better alignment to our mission and values, with compelling investment manager reporting on agreed ESG metrics
- Compliance with regulatory requirements, clean audits
- Maintain appropriate levels of reserves to mitigate identified financial risks
- Grant-making from the available funds is optimised, and reporting targets are achieved

Digital Systems

Our systems and technology should support operational efficiency, growth and learning and ensure we remain agile and forward looking. We want to capture and use relevant data to support impact reporting, foster donor relationships, inform grant making and improve decision making

What we will do

- Upgrade Salesforce and embed new processes and reporting
- Upgrade the finance system and streamline processes and reporting
- Identify and collect key strategic data to improve reporting and decision making
- Use AI where appropriate to streamline processes and free up staff time for value added and relational activities

How we will measure success

- Salesforce is fully integrated, with improved processes and reporting, and a culture of continuous learning
- Updated finance system provides efficiencies, including improved interaction/integration with Salesforce
- Enhanced impact reporting to donors
- AI policy in place, adoption of appropriate software, and staff time reallocated to add value



Communications

Clear, consistent and authentic communication is vital to expressing our purpose, impact and values, and strengthens relationships with donors, partners, communities and the wider sector. Through inclusive, human storytelling, we build trust and inspire engagement.

What we will do

- Develop and deliver a communications strategy
- Core external communications: website, social media, newsletters, impact reports, press engagement
- Host a range of events that celebrate impact and attract prospects
- Strengthen internal communications to keep the team informed and connected

How we will measure success

- Our communications are evaluated as hope-based, human and impactful
- Recording analytics to demonstrate increased visibility and engagement by our key stakeholders
- Increased awareness of community led impact that brings a return on investment
- The team, trustees and volunteers feel informed, aligned and able to represent Two Ridings effectively



Find out more

To learn more about Two Ridings Community Foundation and our plans for the future, please do get in touch

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