



# our strategy

2021 - 2024



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# introduction

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The Foundation has grown significantly over the last three years, we have had many successes and challenges along the way but what remains paramount is our commitment to support our West Midlands and Warwickshire communities to live happier, healthier lives.

Working collaboratively with our board and staff team we have refreshed our vision, values and mission to ensure they reflect the ethos and values we hold strong and have set our 3-year strategy with a clear direction of travel.

Equity, diversity and inclusion are embedded throughout our strategy, we aim to have a board and staff team that reflect the wonderful diversity of our region, we will become more data driven which will enable us to analyse our grant making and set priorities to ensure we are fair and equitable in our support to communities.

We know there are communities disproportionately impacted by COVID-19, we know certain areas of our

region have been hit hard by the pandemic so we hope with the support of both new and existing donors we can effectively support them through a range of philanthropic giving.

We want to maintain excellent relationships with our existing donors and build new relationships with generous people who care about our communities, we need to secure new funds to support our ambition to invest £10m over the next 3 years and grow our long-term funds to £25 million.

Our strategy is ambitious, but we know we can achieve this through collaboratively working alongside our existing donors, hopefully new donors and our communities.

I hope you enjoy reading our strategy and we look forward to engaging with you over the next few years.

**Tina Costello**  
Chief Executive



**our vision**

**TO HELP WEST MIDLANDS  
& WARWICKSHIRE  
COMMUNITIES LIVE  
HAPPIER, HEALTHIER LIVES.**





# our mission

TO CONNECT GENEROUS  
DONORS WHO CARE, WITH  
COMMUNITY CAUSES THAT  
MAKE A DIFFERENCE.





# our values

## CARE

We care passionately about our communities, our donors, and our team.

## FAIRNESS

We promote equality and diversity in everything we do.

## TRUST

We are trusted by all those who work with us.

## AMBITION

We give our communities the strength to achieve their aspirations.

## FUN

We take our work seriously with some fun along the way.



# our strategic aims

IN THE NEXT 3 -YEARS WE WILL:

# 1

DELIVER ACCESSIBLE, INCLUSIVE AND FLEXIBLE FUNDING.

We will explore and develop new approaches to grant making with the aim of offering flexible funding options and a simplified, improved customer service. Using our data, we will identify challenges and gaps in our funding and target areas where our funding makes a real difference.



A background image of a woman with blonde hair, wearing a dark jacket, walking on a sidewalk and carrying a large shopping bag. The image is overlaid with a semi-transparent magenta filter. The woman is positioned on the right side of the frame, walking towards the left.

# 2

**MAINTAIN STRONG RELATIONSHIPS WITH EXISTING DONORS TO ENSURE WE RETAIN THEIR INVESTMENT TO IMPROVE LIVES IN THE REGION.**

**Our donors are so important to us, without them we could not support our communities in such an impactful way. We want to celebrate our donors, showcase their generosity, and provide an outstanding bespoke service for each and every one of them.**





# 3

CONTINUALLY SEEK TO ATTRACT NEW DONORS TO INCREASE OUR SOCIAL INVESTMENT IN THE WEST MIDLANDS REGION.

We need to continually attract new donors who share our love of the West Midlands and want to make an impact at a local level. Our ambition to invest £10 million into our communities cannot be achieved without the support of local philanthropy.

We build endowment as a long-term asset for our communities now, and for generations to come. We aspire to grow this to £25 million; it is ambitious but achievable.

# 4

## TO BE AN EQUITABLE, DIVERSE AND INCLUSIVE FUNDER.

The Foundation strives to be an inclusive funder, supporting the rich diversity of our region and the people that live in it. We want our funding to be fair and equitable so we will evaluate our grant making, benchmark against protected characteristics and ensure our priorities and decision making are informed by intelligence.





# 5

**STRENGTHEN OUR EXISTING FINANCE, GOVERNANCE, AND LEADERSHIP TO ENSURE DONOR TRUST AND CONFIDENCE IN THE CHARITY'S SUSTAINABILITY AND LONGEVITY.**

**We are a trusted organisation, trusted by our donors and the communities we support. We will develop and implement continuous improvement strategies to maintain our robust governance and financial procedures.**



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