



**Community
Foundation**
for Surrey

Local giving for local need

Impact Report

A Review of the Outcomes
and Impact Achieved by the
Community Foundation for Surrey

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Foreword

It is such an honour for Barclays to be working closely with the Community Foundation for Surrey in 2018. You should feel, as we do, immensely proud to be associated with a Foundation that, through your efforts, generosity and support, has enabled nearly £8m to be awarded in grants to so many excellent projects and charities in Surrey, since establishing in 2005. That really is Impact in the Community.

We are always keen to support organisations that reflect our own Brand Purpose and Values in supporting our local communities, and the work of the Community Foundation for Surrey really demonstrates this ethos, in helping individuals and communities in every part of the county. This report reflects the extensive work and investment in Surrey over the past twelve years, and we are delighted to have supported the Foundation in bringing this report to you.

Robin Reynolds, South East Regional Director
Barclays Wealth Management

Supported by



This report has been written by the Community Foundation for Surrey's Director of Grants & Impact, Kate Peters, and Trustees Nigel Gillott and Dr. Julie Llewelyn.

Thanks to our volunteers for their assistance with the data analysis for this report - Zahran Haque, Chris Peters and Tanmayii Rao who volunteered as part of the Royal Holloway University Community Research Hub - an initiative that provides students with opportunities to partner charities and other external organisations for mutual benefit, involving research-related opportunities.

The Foundation would also like to thank Barclays who have kindly supported the publication of this report, and Royal Holloway University for generously supporting the launch, as well as the 407 Community Groups whose detailed end of grant reporting provided the information for this report.

Executive Summary

Section 1: Background

The Community Foundation for Surrey ('the Foundation') has undertaken detailed research to study whether its activities lead to the good outcomes and to the significant impact that it wishes to achieve in Surrey.

The Foundation uses two Theory of Change models to help it to deliver its mission. Theory of Change¹ is a formal well-documented process that has helped to ensure that the detailed work undertaken by the Foundation leads to good outcomes which result in significant impact in the county.

Section 2: Philanthropy

Substantial progress has been made by the Foundation in promoting philanthropy in Surrey. In particular, £22 million has been generated in twelve years and over 80 charitable funds are managed by the Foundation. However, Surrey is home to over a million people and there remains limited awareness of the opportunity for philanthropy in Surrey. As a result of the original work it commissioned^{2,3}, the Foundation has clearly demonstrated that Surrey has pockets of very marked deprivation. There is considerably more scope to grow the level of funds available to support these local needs.

Section 3: Grant Making

The Foundation has demonstrated success in its purpose of improving the lives of local individuals, in accordance with its Theory of Change model. The level of funding provided to community groups is currently over £1 million per annum (with a total of over 2,700 grants, amounting to £7.9 million having been given in the last twelve years), and the level of funding is anticipated to rise sharply over the next few years in line with increased philanthropic giving.

The qualitative and quantitative data collected from the community groups who have received grants demonstrates that these grants have led to outcomes that improve the lives of a wide range of individuals and also represent a good Social Return on Investment⁴. In terms of the desired long-term impact of achieving a happier and healthier society in Surrey, the Foundation considers that it has been successful to date but there is clearly much more to be done.

Section 4: Future Developments

Development of the Foundation's systems to improve outcomes is a continuous process. As a result of this analysis and the research published in Surrey Uncovered³, the Foundation will increase philanthropic impact by a more wide-ranging marketing and development strategy, an enhanced social media strategy, a legacy programme and an initiative to launch new funds targeted at areas of specific identified need.

Grant making impact will be improved by focusing more on the communities in Surrey where there is very significant need. Impact data collection systems will become more integral to the Foundation's grant making process and suitable projects for collection of financial data to assess Social Return on Investment will be identified. The Foundation is well placed to achieve these changes, having restructured to create two new roles: a Director of Philanthropy and a Director of Grants & Impact.

The Foundation will continue to work towards the longer-term goals of encouraging a wider involvement in philanthropy and achieving a happier and healthier society in Surrey.

Section 1: Background

The Community Foundation for Surrey was established in 2005 and is part of a national network of 46 Community Foundations, one of the fastest growing philanthropic movements in the UK.

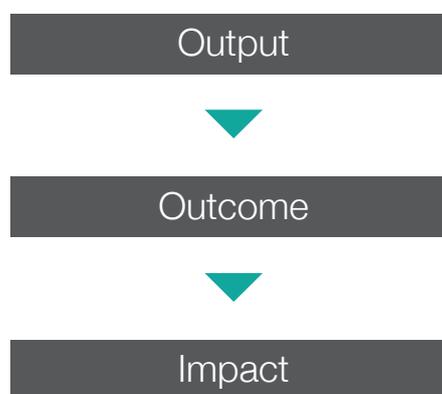
The mission of the Foundation is to inspire strategic local philanthropy for local need and to make a lasting impact in the community.

To deliver this mission the Foundation concentrates on two areas:

- **Philanthropy** - Engaging people in local philanthropy by building sustainable funds to increase the level of resources available to community and voluntary groups in Surrey.
- **Grant Making** - Identifying and understanding where need exists in Surrey and connecting this need with local donors who will fund strategic grants to strengthen communities and make a genuine difference to the lives of local people.

These two activities of the Foundation, philanthropy and grant making, are fundamental to the success of the Foundation in meeting its purpose and ensuring a better life for many of the residents of Surrey.

The Foundation's work is based on two Theory of Change models - one for philanthropy and one for grant making. Theory of Change provides a methodology to describe how the activities of an organisation produce a desired impact by describing the process from output to outcome to impact.



The Foundation has undertaken detailed research to determine how successful it has been in implementing its two Theories of Change. This is the first major report investigating the impact made by the Foundation. It answers the question of what impact the Foundation has achieved in its two main areas of activity: philanthropy and grant making. Further it considers what the Foundation should do in future to ensure that the successes of the past can be built upon and multiplied.

Section 2: Philanthropy

Philanthropy is the desire to promote the welfare of others, expressed primarily by the donation of money.

The aim of the Foundation is to promote philanthropy and, by doing so, to raise significant resources to provide help for those in need in Surrey.

The Foundation has studied the impact it has had in this area to assess the effectiveness of its strategy to date and to inform its future strategy for the development of philanthropy in the county.

The Foundation's philanthropy model can be briefly described by the following Theory of Change:



Output

The Foundation promotes philanthropy by providing:

- events and materials to publicise the work of the Foundation and the impact its grants have made
- research and publication of relevant reports such as 'Surrey Uncovered'³ which outlines the need in Surrey
- narratives about the giving of existing donors and the importance of local philanthropy
- information around financial strategies to make giving tax efficient and cost effective
- establishment of emergency funds in response to unexpected disasters in Surrey
- access to the wider Community Foundation network in the UK

The Foundation provides the following services to philanthropists who have established funds:

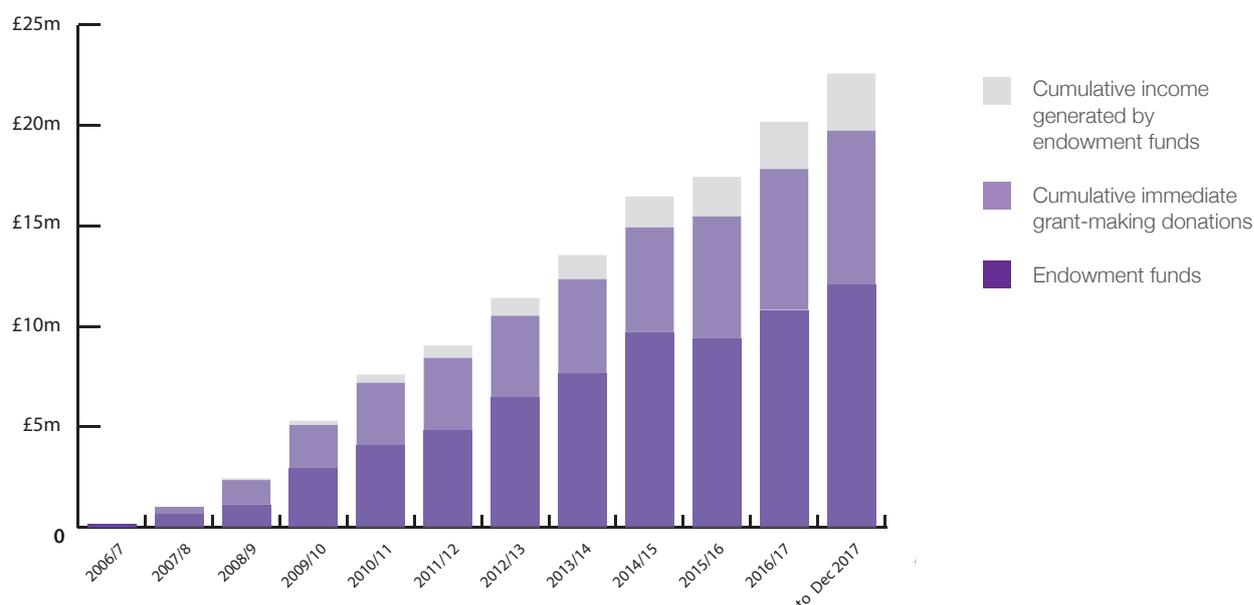
- a dedicated adviser who provides a bespoke service according to the desired level of involvement from the individual fund holder
- advice on how best to incorporate local giving into a philanthropic strategy
- a unique and in-depth knowledge of the charitable sector and unmet needs in Surrey
- a range of funds including endowment and immediate grant making funds and, more recently, collective funds for those who do not wish to set up their own fund
- a comprehensive due diligence process which includes grant assessment and grant monitoring
- investment expertise
- site visits to community groups
- individual and small group meetings to exchange information with other philanthropists

Section 2: Philanthropy

Outcome

Since the Foundation's launch, the total amount of resource which has been generated for the benefit of Surrey's communities up to 31 December 2017 is just over £22 million. This figure includes total endowment funds of £12 million, as well as £2.5 million in income generated by the endowment funds and made available for grant-making, plus total donations provided for immediate grant-making of £7.5 million:

Figure 1: Total Philanthropic Resources generated by the Foundation to 31 December 2017



The table below shows the total amount of resource which has been generated for the benefit of Surrey's communities up to 31 December 2017, broken down by type of fund.

Table 1: Breakdown of Philanthropic Resources generated by the Foundation to 31 December 2017

Type of fund	Value (£ million)
Individual and family giving	£9.16
Legacies and in memoriam	£1.45
Corporate giving	£0.85
Charitable trusts	£2.73
TOTAL bespoke giving	£14.19
Area funds	£4.50
Themed funds	£2.19
TOTAL collective giving	£6.69
Grassroots Grants ⁵ programme (2008-11)	£1.17
TOTAL	£22.05

Table 2: Breakdown of the Foundation's Funds by type at 31 December 2017

Type of fund	Number of current funds
Individual and family giving	22
Legacies and in memoriam	6
Corporate giving	13
Charitable trusts	13
TOTAL bespoke giving	54
Area funds	15
Themed funds	13
TOTAL collective giving	28
TOTAL	82

The table above provides a breakdown of the Foundation's current Funds by type.

Funds

The largest bespoke fund, as at 31 December 2017, has contributed a total of almost £2 million in support of Surrey's communities. This figure includes a total endowment of £1.5 million, as well as £200,000 in income generated by the endowment which has been made available for grant-making, plus total donations for immediate grant-making of £250,000.

The largest Area Fund is currently the Haslemere Challice Community Fund. Originally established from a bequest made to the Haslemere community by Mrs Ruth Challice Bush, the fund has built to a total endowment of £1.1 million at 31 December 2017. Donations from local residents, legacies, and funds raised in the Bordon, Liphook and Haslemere Charity's shop in Haslemere have contributed to this significant milestone. Over £200,000 has been awarded in support of local community groups to date.

It is the Foundation's intention to grow other funds to this level – and beyond. The Foundation will also actively promote the opportunity to leave a legacy for local communities.

When the Foundation was established in 2005, it aimed to reach an endowment target of £10 million and an annual grant giving target of £1 million within ten years. It reached both of these targets and continues to increase both the level of its endowment funds and the amount given away in grants.

While this is a considerable achievement, the Foundation is acutely aware that:

- there is significant need in Surrey as witnessed by the Foundation's Surrey Uncovered³ reports in 2013 and 2017
- in difficult economic times, national and local government has materially reduced its contribution to community groups across the country
- the Community Foundation for Surrey is young compared with the other Community Foundations in the UK who have collectively given away over £1 billion to good causes

Bespoke Funds

The Foundation's bespoke funds allow donors to direct their giving into the areas and community needs about which they are most passionate. One couple describes this:

"We have our own fund that focuses on our interests and we can be as involved as we wish. By working with the Foundation, we do not have the burden and costs of compliance with the Charity Commission had we set up our own charitable trust. We have visited projects and had huge support from the Foundation's team who source and assess applications for us to consider... We have made some exciting grants, learned a lot and uncovered the hidden Surrey behind the wealthy exterior."

In addition to providing grant making services and expertise, the Foundation facilitates regular donor gatherings in order to encourage donors to meet and share their philanthropy experiences. This wider community is something donors have indicated is important to them and creates a feeling of being part of something bigger.

Section 2: Philanthropy

Collective Funds (including Area and Themed Funds)

The Foundation has succeeded in establishing various collective funds which bring together a number of donors with a shared interest, and take a strategic approach to direct giving where it is most needed.

A prime example of this is the **Surrey Flood Recovery Appeal** which the Foundation launched in early 2014 in response to the devastating winter floods that left many residents homeless and severely affected many local community groups. The Foundation's crisis campaign raised £184,000 in donations from sources such as the Office for Civil Society, Surrey County Council, businesses, foundations, local groups and individual residents. The Foundation was able to fund a variety of vital services in the aftermath of the flooding, including providing equipment replacement for charities, and counselling and support for victims of the flooding, as well as supporting individual households to replace belongings or repair damage caused by the floods.

Another example of the Foundation's collective funds is the **Surrey Young People's Fund** which supports young people from disadvantaged backgrounds into training and employment. The Foundation brought together four founding donors who each gave £5,000 to establish the Fund, which is now open to anyone to make a contribution. To date, the Fund has supported 185 young people.

One young person supported by the Fund said:
"Thank you for funding me, I'm grateful for your help. Your funding will help me get a long term and secure job which will help me stay on my feet. Thank you for your help."

Developing Philanthropy

There are many ways to encourage people into philanthropy. However, in most cases, the potential philanthropist is likely to want to be sure their money will be well used. People may think in terms of a good return on capital or an appropriate return on investment.

This financial concept is increasingly being used in the charity sector to measure whether money provided by grant making bodies to charities is used effectively. In the case of charities, the concept of Social Return on Investment⁴ is used. This entails putting monetary values on all the outcomes that a community group achieves. While this can be difficult, it is not impossible, and there is a growing body of knowledge concerning the best ways to do this.

The Foundation is increasingly experimenting with such measures to better inform its donors (and potential donors) of the impact that is being made by the community groups it supports.

Unmet Need

It is clear that the demand for finance from community groups doing good work in Surrey far outstrips the available supply. In 2017 40% of approaches to the Foundation were not invited to apply for a grant. Of these, 40% were outside Surrey or were not ready for funding or did not meet the criteria: however 60% could not be invited to apply because there was no suitable philanthropic fund to support the project.

This represents almost £1 million in project costs the Foundation was unable to consider.

Applications for such support to the Foundation will inevitably increase as more community groups become aware of the funding that the Foundation can provide.

To meet this unmet need, more philanthropists are required. Philanthropists come from all backgrounds and vary from the very wealthy to those who would not be described as wealthy at all. The one thing they all have in common is a wish to support those in society who struggle. Within the Foundation, some may set up their own large dedicated funds while others with more modest means may support the Foundation with smaller but significant amounts of money through collective funds. It is important for the Foundation to inspire a wide and diverse range of potential philanthropists in Surrey to provide local funds for local needs.

Impact

Awareness of philanthropy has increased in recent years (with the Foundation now having over 80 different funds provided by those who wish to help local communities). This increase in awareness is seen across the UK as well as in Surrey. **While this increase in awareness in the county is due to many factors, there have been new philanthropic donors to the Foundation who were attracted by the work of the Foundation.** These donors have made significant amounts of money available in Surrey that would not otherwise have been available. **By providing a unique service in Surrey, the Foundation has achieved an increased philanthropic involvement for those who wish to support local communities.**

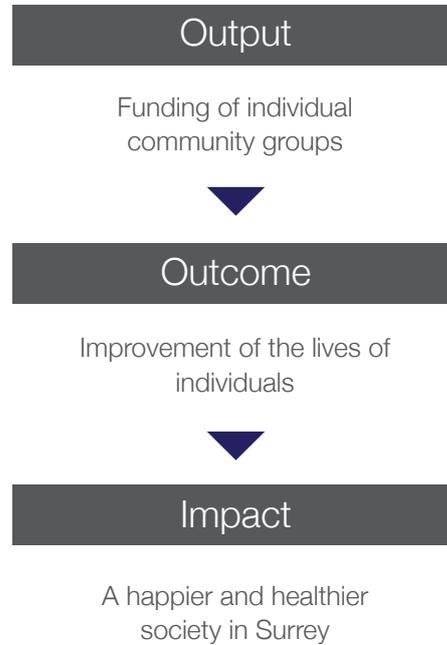
While the Foundation can legitimately claim a positive impact on the awareness of and involvement in philanthropy, it recognises that many people who have the financial resources and the desire to use these for the public good have yet to hear of the Foundation (or any other organisation who can help them to achieve their ambition). If they hear about the work of the Foundation, some may recognise it as the answer to their needs. The Foundation needs to do significantly more work in this area.

Section 3: Grant Making

In the area of grant making, the aim of the Foundation is to identify and understand where need exists in Surrey and to provide money and other help to meet this need. This is achieved through community networking, discussions with voluntary sector groups and formal research which resulted in the Hidden Surrey² and Surrey Uncovered reports³.

The Foundation has studied the impact it has had in this area to assess the effectiveness of its strategy to date and to inform its future grant making strategy.

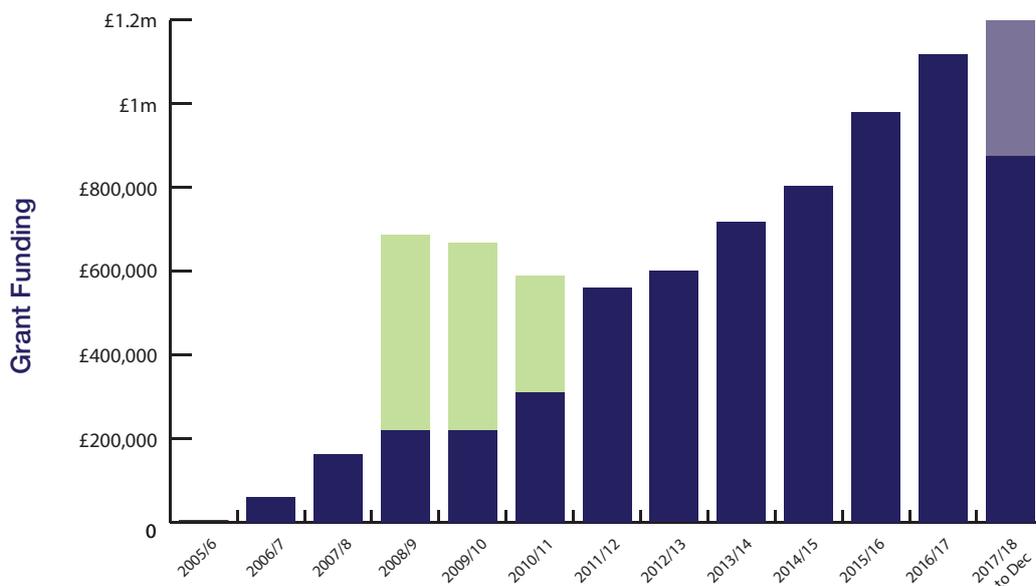
The Foundation's grant making model can be briefly described by the following Theory of Change:



Output

An increase to the annual level of funding provided to local communities has been achieved year on year, as shown by the following graph:

Figure 2: Grants awarded by the Foundation by Financial Year



During 2008 – 2011 the Foundation delivered the national Grassroots Grants programme in Surrey⁵ which awarded £1.17 million in grants

Projection to end of Financial Year 2017/18

In the twelve years since the Foundation was established, 1,446 community groups and individuals had received £7,964,780 in 2,748 separate grants.

The total amount of grants awarded to community groups in the financial year ended 31 March 2017 was £1.115m. The average grant was £3,600 and grants in that year ranged from £81* to £25,000.

*Relatively modest grants to small local community groups often make a significant difference to the beneficiaries of those community groups. For example, the smallest grant made in 2016-17 of £81 enabled a sheltered housing charity to repair a piano so that a volunteer could play it for the benefit of the 32 residents.

The breakdown of the grants between the Impact Assessment Framework themes and between the different geographical areas is shown below.

Figure 3: Value of Grants awarded to 31 December 2017 by Impact Assessment Framework theme

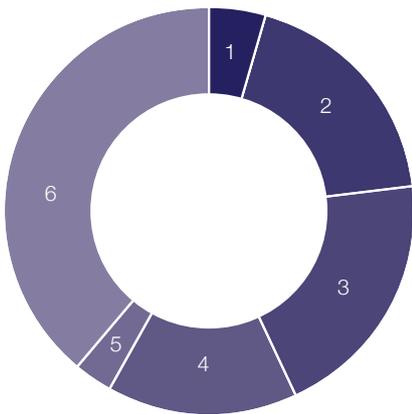
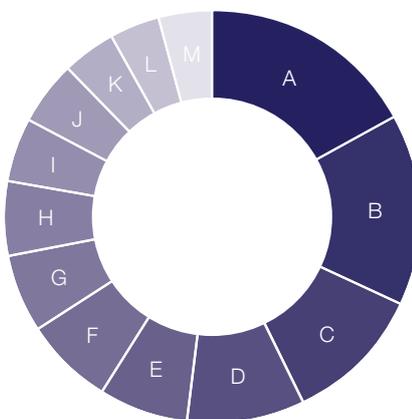


Table 3: Breakdown of grants awarded by the Foundation to 31 December 2017 by Impact Assessment Framework theme

Theme	Number of Awards	Amount Awarded	% of Value Awarded
1. Arts Culture & Heritage	146	£ 364,831	5%
2. Community Cohesion	480	£ 1,486,021	19%
3. Disadvantage & Exclusion	478	£ 1,586,072	20%
4. Education & Skills	571	£ 1,201,481	15%
5. Environment	83	£ 233,577	3%
6. Health & Wellbeing	990	£ 3,092,798	39%
	2,748	£ 7,964,780	

Figure 4: Value of Grants awarded to 31 December 2017 by geographic area



A. Waverley	17%	H. Runnymede	6%
B. Guildford	15%	I. Surrey Heath	5%
C. Mole Valley	11%	J. Spelthorne	5%
D. Reigate & Banstead	9%	K. Region wide	4%
E. Woking	7%	L. Epsom and Ewell	4%
F. Elmbridge	7%	M. Tandridge	4%
G. Surrey wide	6%		

The Foundation continues to pursue a strategy of developing funds and widening its grant-giving across all parts of the county.

Section 3: Grant Making

Outcomes

An increase to the funding of individual community groups is only helpful if that funding is used effectively and improves the lives of individuals. Two important aspects of this are that the lives of a significant number of people have been touched and that the funding has made an improvement in those lives.

The aim of the Foundation is to respond to the need in Surrey and to facilitate the philanthropic giving of its local donors. The result is a diverse spread of projects across many themes. While this breadth of support is to be celebrated, it presents a challenge in measuring impact. It is difficult to compare such varied work as, for example, supporting isolated older people, environmental projects, health education programmes, and training for young parents.

Impact Assessment Framework Method

The Foundation collects qualitative and quantitative data from every grantee, during the grant application process and from an End of Grant Report. The Foundation was involved in developing and piloting an Impact Assessment Framework on behalf of the national network of UK Community Foundations. From 2012 a framework of outcomes and associated indicators, or measures, under six overall themes, was developed and has since been rolled out across the country for use in grant applications and end of grant reporting.

Applicants are able to select outcomes which are appropriate to their work and indicators which provide measurable results for the project.

Example Themes, Outcomes and Indicators

Theme: Community Cohesion
Outcome: Improve access to volunteering
Indicator:

- Number of new volunteering opportunities available
- Number of people engaged in regular volunteering
- Number of volunteering opportunities available

Or

Theme: Disadvantage & Exclusion
Outcome: Support vulnerable people
Indicator:

- Number of people accessing support services
- Number of people achieving independent living/no longer requiring support
- Number of people who participated in community activities

The data provided directly by the community groups was collated to assess the impact of the Foundation's grant making. The data was well documented and in a consistent format. It represented the opinions of the community groups who were directly involved with the individuals they helped and were thus best placed to measure the change made by each grant. There were inevitably some differences between community groups in how they assessed the various numbers for each indicator. For example, some community groups have reported on the results of the entire funded project where the Foundation only contributed part of the cost, some community groups included an individual in more than one indicator, and some individuals may be included in more than one funded project. In some instances, there appears to be under reporting of outcomes as well as over reporting. Nevertheless, it is believed that the data gives a broad indication of the outcomes produced by funded projects.

This provides the Foundation with quantitative data regarding the outcomes of each of the grants awarded. In addition, each grant-funded community group is asked to provide a case study of an individual supported through their particular project, and this provides qualitative data.

Grant Making

From the beginning of the Foundation’s use of the Impact Assessment Framework in 2012 to the end of the last full financial year, 31 March 2017, 407 End of Grant Reports were returned representing £1,358,351 in grant making.

Figure 5: Value of grants by Impact Assessment Framework theme as reported in 407 End of Grant Reports

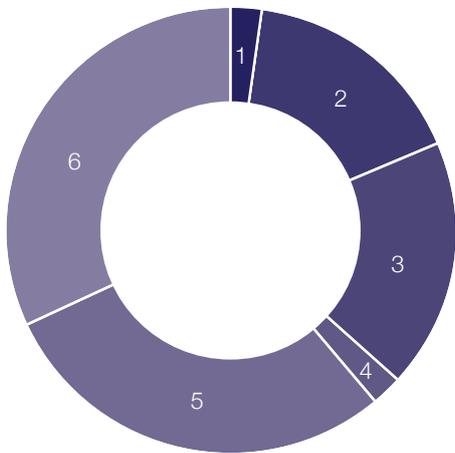


Table 4: Number and value of grants by Impact Assessment Framework theme as reported in 407 End of Grant Reports

Theme	Number of Grants Awarded	Amount Awarded
1. Arts, Culture & Heritage	16	£31,470
2. Community Cohesion	70	£221,719
3. Education & Skills	58	£247,944
4. Environment	9	£29,469
5. Health & Wellbeing	129	£394,463
6. Disadvantage & Exclusion	125	£433,286
Total	407	£1,358,351

The resulting data provides information regarding the level of participation in activities which have been enabled by the Foundation’s grant funding:

- 17,165 people participated in community activities
- 7,978 vulnerable or isolated people attended regular social activities
- 22,627 hours of sport, exercise & leisure activities have been provided
- 2,081 people were supported to achieve independent living

The Impact Assessment Framework also provides the Foundation with data regarding the differences these activities have made on individuals’ lives:

- 793 people have gained accreditations
- 1,445 people started on the path to employability
- 239 people gained sustainable employment
- 11,064 people reported improved physical, mental and/or emotional health

Section 3: Grant Making

Arts, Culture & Heritage

16 grantees reported under the theme of Arts, Culture & Heritage. This small group of grantees reported involving 2,533 people in their objective of promoting opportunities for creativity.

- 9,132 visitors/audiences were engaged by these projects along with 90 volunteers

A grant to **York Road Project** in Woking part funded a sessional worker to deliver a morning session for homeless people exploring their feelings followed by a session of music. Every client was given an instrument (guitar, drums, harmonica, percussion etc), taught a chord and together a song was produced. Other clients sang alongside staff. As part of the project, clients were introduced to other creative environments including visiting the Lightbox art gallery in Woking and inviting Dance Woking to lead a workshop. 165 people participated in the project including 58 new people participating in projects for the first time.

“Due to their homeless situation and potential addiction or mental health issues, it was at times difficult to pull together a group who were physically able to take part and to contribute. Over time however, the workshop itself became the incentive to be present in a way that enhanced the project.”

Community Cohesion

The 70 reports under the Communities theme indicated that 25,033 people had been affected by these projects.

- 2,615 people engaged in regular volunteering, 335 of whom were new to volunteering
- 9,385 people participated in community activities, 1,770 of these for the first time
- 12,017 people had used new or improved community facilities supported by these grants

A small grant of £1,300 for equipment for a new larger nursery space in an established community centre in Cobham enabled **Oasis** to improve the choices for local families who feel isolated due to poverty or abuse. 120 people had accessed this new facility at the time of reporting. Vulnerable children have been given a central well-equipped nursery environment to attend within their community.

Oasis reports positive feedback from service users and professionals that the new items have improved not only the look of the centre but also made it feel lighter and brighter. One item, the planter, has been planted by the staff and children who are continuing to tend it. This care of the plants has long term benefits and helps the children work together on a project.

Disadvantage & Exclusion

In the period 125 reports were received from groups which chose Disadvantage & Exclusion as the theme of their work. These groups collectively received £433,286 in grants.

- 20,528 people accessed support services as a result of the funded projects, 6,119 for the first time
- 7,978 people attended community activities with the outcome of reducing social isolation

A grant of £13,060 to **Farncombe Day Centre** supported the operation of a minibus to transport members to and from the centre. An average of 247 people use the minibus each month, allowing them to attend social activities (exercises and games, musical entertainment, arts & crafts), buy a hot meal and access support services. The ultimate outcome is that they are enabled to live independently.

Environment

- 9 grants under the Environment theme have resulted in 1,530 trees being planted and 5 new community facilities created
- 3 new low energy community facilities have been created

A £558 grant to **Transition Guildford** resulted in the creation of two new community orchard sites with 40 volunteers engaged in planting the 30 trees and in the ongoing care of these community spaces, including scything the rough grass areas.

Health & Wellbeing

Community groups receiving 129 grants totaling £394,463 reported on outcomes relating to Health & Wellbeing.

- 6,825 people took part in sport, exercise & leisure activities as part of the projects
- 11,064 people reported improved physical, mental and/or emotional health

Case studies for individuals are a useful illustration of the positive changes resulting from the work done by our grantees.

Relate Mid-Surrey is an independent, registered charity, whose principal activity is the provision of counselling services. A grant of £3,000 was awarded to support the provision of counselling for disadvantaged adults, in particular victims of domestic abuse. The charity identified Improving Health and Wellbeing as the Impact Assessment Framework theme for their project and reported that 49 people accessed support services for the first time as a result of the project and 37 people reported improved physical, mental and/or emotional health.

A & B's Story

A and B began to experience relationship problems when they started a family. A felt she had her hands full and was disappointed when B showed frustration at the state of the house. She felt increasingly criticised and turned to alcohol to numb her feelings.

Their problems continued for several years and eventually A contacted **Relate Mid-Surrey**. A and B together attended a few counselling sessions. The counsellor realised that A was distressed and invited her to an individual assessment, where A disclosed the abusive nature of the relationship and her own heavy drinking. Because B controlled the finances, A said that she would not be able to continue counselling. However, the counsellor was able to secure funding for A's counselling from a grant awarded to **Relate Mid-Surrey** by the Foundation.

A found counselling a transformative process in rebuilding her confidence. However, the relationship deteriorated further. With the support of her counsellor, A made plans to leave the family home. This process was traumatic, but gave A the opportunity to take control of her life at last. Without counselling at **Relate Mid-Surrey**, A believes she would not be here now.

Such case studies demonstrate that local work funded by the Foundation is helping a local individual.

Section 3: Grant Making

Grant Making Outcomes

A more comprehensive analysis of outcomes and whether the community group funded has provided value for money is to measure the progress of all those it is attempting to help. This can be done for all the work of a community group or for large community groups can cover a particular individual project that is funded.

The overall outcome can then be compared with the funding and resources used by that community group to produce the relevant outcome. This involves monitoring the position of its clients before and after a particular project, showing that an improvement has been made. Such improvement can then be measured against the funding provided by the Foundation.

East to West is a Surrey-based charity which helps young people who experience difficulties to get their lives back on track. This is achieved by providing support and activities which develop young people's skills, capacities and capabilities.

The Foundation provided a grant of £5,000 to **East to West** for Relational Support Work in a secondary school in North Surrey. Relational Support Work is an active, dynamic relationship based service focusing on solution based outcomes which lasts for as long as a young person needs support. The project has been running in this school for more than ten years. Over this time **East to West** have seen a steady increase in the numbers of students being referred by the school for support from their team of Relational Support Workers. There has also been an increase in students requesting drop-in help because they were facing the challenge of self-harm or low self-esteem, struggling with anxiety around exams, facing friendship or family breakdown, or had experienced the loss or terminal illness of a family member.

Funded by this grant **East to West** was able to deliver 950 sessions for 181 referred students over 721 hours during the 3 terms over which this grant supported the work. 125 of the cases were closed – i.e. no additional response for issues identified and resolved was required and the young person was able to reintegrate back into school successfully. **East to West** collect evidence from closed cases, rather than on an ongoing active case basis. **East to West** were able to identify on average five positive, evidenced changes to attitude, behaviour or situations for each of the students being supported.

In addition to one to one support this funding enabled group work activity and a series of assemblies to all the 600 students in the school looking at grief and bereavement. The Relational Support Worker was able to support several additional students who shared their own personal experiences (of which the school was not aware), but who had been struggling to cope with what had happened to them.

The staff cost of a full time Relational Support Worker is £22,000. At a direct cost of £122 per referred student this project is considered to have provided good value for money.

Education & Skills

58 grantees reported under the theme of Education & Skills. This reflected £247,944 in grants supporting projects which involved 7,304 people.

Activities provided included 68,907 hours of education and training.

- 4,356 people attended training
- 1,445 people started on the path to employability
- 793 people successfully gained accreditations

As a result of these activities:

- 449 people went into further education
- 239 people gained sustainable employment

An example of a local charity helping young people in difficulty through the provision of supported employment is the establishment of a Coffee Shop by Leatherhead Youth Project. **In this case the value for money (or Social Return on Investment⁴) of the project can be illustrated quite precisely.**

All Saints Coffee Shop, a social enterprise set up by **Leatherhead Youth Project**, runs a café which employs apprentices who otherwise would be unable to find work. Since its establishment in 2014, the coffee shop has employed 14 apprentices who work with the organisation for one year, whilst gaining their qualification and learning new skills, before being supported to find work elsewhere.

Of the 10 who have completed their apprenticeship:

- 6 have gone on to another full-time job which they continue to hold
- 2 moved on to further education courses after completing their apprenticeship
- 2 were unable to finish their apprenticeship at the coffee shop because they were unable to hold down a full-time job

Given the challenges that these young people faced in their lives, the fact that 6 of them continue to hold down a full-time job and 2 progressed to further education is a great tribute to the young people concerned and to **Leatherhead Youth Project**. These young people were unable to find an apprenticeship or a job before All Saints Coffee Shop took them on and there is little doubt that these young people would still be out of work today if they had not been given an opportunity in the All Saints Coffee Shop.

Leatherhead Youth Project recently commissioned an external and independent review of the Social Return on Investment provided by All Saints Coffee Shop. It was revealed that in one year of running the coffee shop the government saves £53,063 in benefit savings and related costs, and the coffee shop adds a total social profit of £228,515 through the employment and economic contribution the apprentices make to the local economy. This results in a total Social Return on Investment of £281,578. This compares very favourably with the grants provided by the Foundation totalling £28,900 for the capital set-up costs, and a total annual project budget of £49,459. Put another way, for every £1 spent on running All Saints Coffee Shop, £5.69 is created in social value.

Add to this the noticeable increase in well-being for those individuals by having a job and there is no doubt that the funding provided by the Foundation to All Saints Coffee Shop has been good value for money and a good Social Return on Investment.

Outcome Highlights



1,530

9 grants under the Environment theme have resulted in 1,530 trees being planted



6,825

people took part in sport, exercise & leisure activities as part of Health & Wellbeing projects



2,615

people engaged in regular volunteering as part of Community Cohesion projects



239

people gained sustainable employment as part of Education & Skills projects



7,978

vulnerable or isolated people attended regular social activities

Impact

It would be naïve of the Foundation to think it could comprehensively justify that Surrey was a happier and healthier society solely because of the work it had undertaken over the twelve years since its establishment. However, **there is undoubtedly an improvement to many individual lives because of the activities of the Foundation and this is the start of the achievement of the long-term impact desired.**

Increased experience should mean an even more effective grants programme in the future. **The Foundation continues to work on improving its methodology for determining whether the grants given to community groups from the funds provided by its donors do provide real value for money.** In nearly all cases the money has been used to good effect and the Foundation believes it is important to learn from the many successes and the occasional failure to ensure that its grant giving provides more and more effective value for money.

Section 4: Future Developments

Philanthropy

This impact assessment shows a clear need to increase the number of philanthropists and the total amount given by philanthropists in Surrey.

The Foundation has therefore recently restructured and appointed a Director of Philanthropy to generate more awareness of the services provided by the Foundation through a much broader marketing and development strategy. This will include an enhanced social media strategy, a specific legacy programme, as well as funds targeting areas which the Foundation's research and impact data has demonstrated to be areas of unmet need.

Further concentration on activities to promote philanthropy, including adopting creative new approaches, is a key part of the future strategy of the Foundation. This should lead to an outcome of significantly more money being raised and, in the longer term, to an impact of wider involvement in philanthropy across Surrey.

Grant Making

To date, the Foundation has achieved many useful outcomes. Increased experience should mean an even more effective grants programme in the future. There are some geographic and thematic areas where the penetration of the Foundation is relatively weak and where there is significant need. These will be priority areas. **In particular the Foundation is developing new programmes to bring donors together to make an impact with a Mental Health Fund and a fund which will help strengthen local organisations through capacity building.**

Longer term, rather than one-year funding, gives organisations the time and resources needed to plan and embed work, and evidence the difference it makes, rather than diverting valuable resources to chasing short term funding. The Foundation is already receiving a positive response from its donors in support of this belief and will continue to develop the opportunity to provide sustained support.

Further work is being done around monitoring outcomes and the importance of this issue is reflected in the appointment of a Director of Grants & Impact. The Foundation will improve further the data collected and its analysis of this data whilst not over burdening grantees with excessive work in the area of monitoring and data collection.

The increase in impact of grant making is a long-term strategy that will ultimately bring about a happier and healthier society in Surrey. Such long-term changes to society will inevitably take time. While some progress has been made by the Foundation as illustrated in this report, there is a lot more to do. Achieving a real impact on the population of Surrey is the longer-term goal.

References: ¹ Creating Your Theory of Change. NPC's Practical Guideline. E Harris, L Hodgson and J Noble. Nov 2014. <https://inspiringimpact.org> - ² Hidden Surrey. Dr H. Bowcock. Community Foundation for Surrey. 2009. - ³ Surrey Uncovered. S. Sangarde Brown. Community Foundation for Surrey. 2013. Surrey Uncovered Update. S. Sangarde Brown. Community Foundation for Surrey. 2017. - ⁴ A Guide to Social Return on Investment. Cabinet Office, Office of the Third Sector. www.thesroinetwork.org - ⁵ Grassroots Grants programme. A programme aimed at supporting small, local voluntary sector organisations which ran from July 2008 to March 2011 and was funded by the Office of the Third Sector (OTS). The Community Foundation for Surrey delivered the programme in Surrey and awarded £1.17m in grants.



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