

Strategic Plan 2025-2030

Our Vision

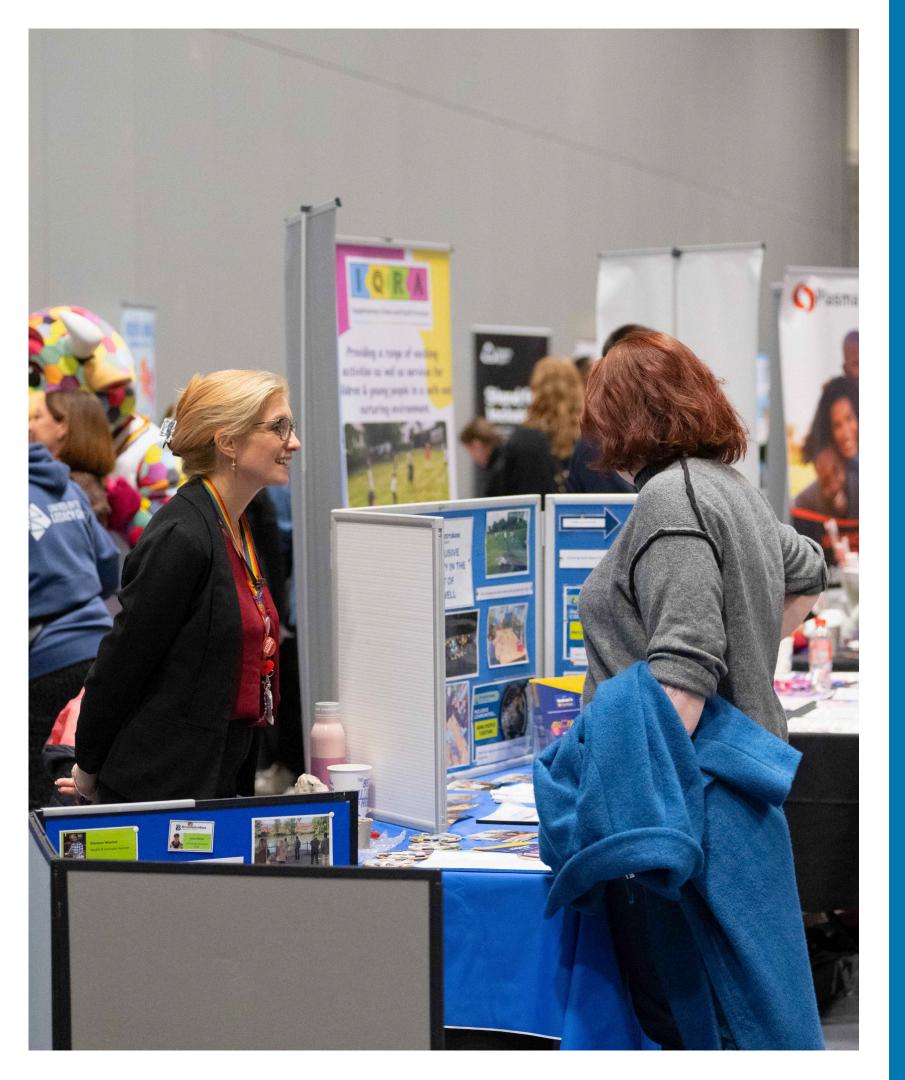
We nurture philanthropy, connecting people who care, with incredible causes that matter. We help to unlock the resources to tackle local issues and to support people and communities to thrive across the region.

Our Mission

We believe in supporting communities to create a **fairer, happier and healthier Midlands** – where everyone has equal access to opportunities, experiences genuine wellbeing, and enjoys a healthy and active life as part of their community.

Our Values





Our Strategy

We are pleased to present the new five Year Strategy for Heart of England Community Foundation, which outlines our vision, goals, and key initiatives for the next several years. This strategy represents a forward-thinking approach to building on our successes, addressing current challenges, and positioning us for sustainable growth and impact in the future.

Through careful planning and collaboration, we have developed a roadmap that aligns with our mission, strengthens our operational capabilities, and enhances the value we deliver to our stakeholders.

The following plan provides an overview of the strategy, its strategic objectives, and the key priorities that will guide us through the coming years.

Our Goals

Grant making
Fund Development
Endowment

Excellence

Technology

Belonging

Sustainability 0

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1 Grant making

Transform our grant making to align with the needs of our communities.

In the next five years we will:

- Give more responsibility to decision-makers, and make applications forms more accessible for everyone.
- Ensure our end-of-grant forms are relative to the size of the grant.
- Promote our funds with a targeted marketing plan, identify areas that need more support, and connect with communities through roadshows, workshops, and surgeries.
- Get ready for the Salesforce Lightning update by cleaning and standardising our data.

02 Fund Development

Grow our income base across all flow through funding streams. Distribute grants totalling £25million by 2030.

In the next five years we will:

- Diversify our income by targeting specific sectors.
- Develop a suite of marketing assets for use at key events and meetings to engage with relevant stakeholders and build connections.
- Ensure time is spent effectively on nurturing valuable connections.

17 Endowment

Grow our endowment to £30million by 2030.

In the next five years we will:

- Identify and engage dormant assets to unlock potential funding.
- Maximise our income and expand our network by leveraging current connections.
- Actively explore available opportunities and make better use of available resources.

1 Excellence

Continually refine our operations and governance to remain a trusted organisation.

In the next five years we will:

- Celebrate and engage our Donors by hosting an annual event, giving them a platform to share their inspiring stories and encourage new supporters to get involved.
- Identify any skills gaps in our Board of Trustees and recruit new members to enhance our team.
- Successfully pass QA6 and implement any necessary improvements.
- Establish a baseline to track and measure our impact on social media for better decision-making.

05 Technology

Establish a data and Al strategy.

In the next five years we will:

- Conduct a data audit to better understand and support marginalised communities in our region.
- Develop a strong ethical framework to guide our work and decisions.
- Strengthen our data security by upholding good data governance and cyber security practices.
- Invest in our team's development and technical abilities to ensure skills are relevant and current.

06 Belonging

Embed Diversity, Equity, and Inclusion across all activities.

In the next five years we will:

- Promote inclusion and well-being for all staff by providing workshops and training.
- Create a clear and consistent onboarding process for all new staff and Trustees to ensure everyone starts off on the right foot.
- Recruit with transparency and ensure diverse representation across staff, Trustees, and panel members.
- Measure progress of our staff satisfaction and make improvements where necessary.

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Sustainability

Embed ESG (Environmental, Social, and Governance) at the heart of core operations, investments and grant making.

In the next five years, we will:

- Align our website and marketing assets with the UN Sustainable Development Goals we actively contribute to.
- Create marketing materials focused on ESG themes, tailored specifically for different donor groups.
- Conduct research to explore key issues and identify solutions related to climate change.
- Reduce the use of physical materials by transitioning to electronic versions where possible to support sustainability efforts.

