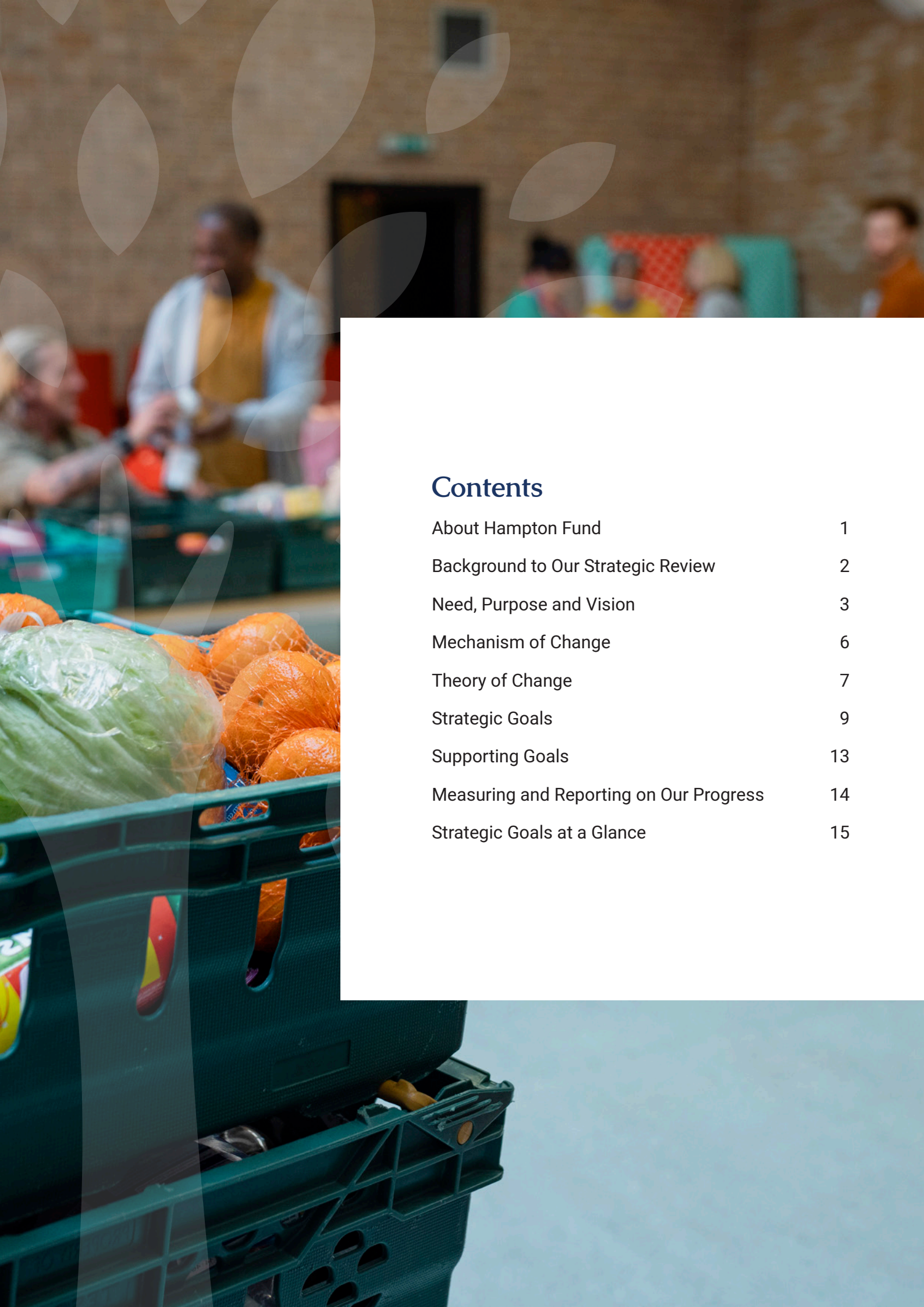


# Strategy

2024–2027







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## About Hampton Fund

Our origins date back to the 1811 Enclosures Act, when land was granted for producing a supply of fuel to the poor of the ancient parish of Hampton. Subsequently, the land was rented out for nurseries, but in 1988 it was sold. The sale proceeds form the financial basis for our current work.

Throughout our 200+ year history we have been a steadfast source of support to the local community. Through two world wars and the recent pandemic, we have been a particularly important resource at times of crisis. Our support has always been direct – helping those on low income to heat their homes. However, more recently it has extended to provide help with other household essentials, but also to offer broader support by funding a range of voluntary sector organisations within our local community. In 2023/24, the total value of our grant making was £2.68m.

Our focus has always been within the local vicinity. Our area of benefit is the London Borough of Richmond upon Thames, but our priority areas are Hampton, Hampton Hill, Hampton Wick, Teddington, Twickenham and Whitton.

Throughout our 200+ year history we have been a steadfast source of support to the local community.

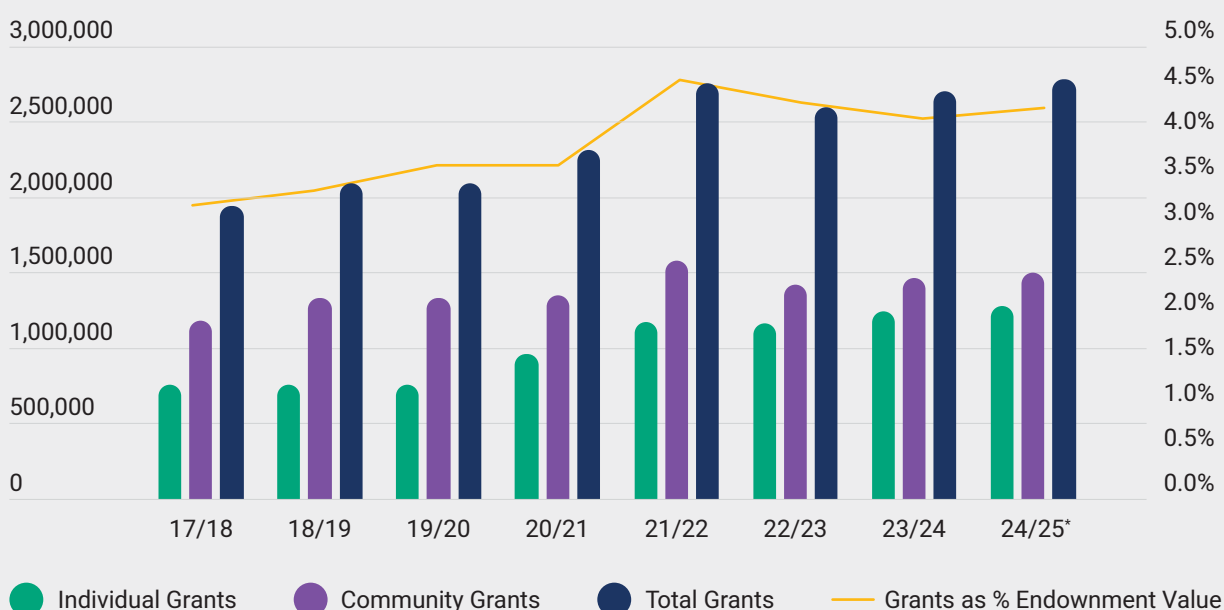
## Background to Our Strategic Review

In recent years the need for support from the voluntary sector has risen, both in our local borough of Richmond as well as the rest of the UK. The impact of the pandemic and the cost of living crisis on the most vulnerable in our communities has been significant, and while the effect of these events on the broader population may be starting to be less sharply felt, the cumulative impact on the most vulnerable will have an impact for a long time to come.

In response to these crises, Hampton Fund's grant making has increased by nearly 30% as the graph below shows. Our resources are finite, but while we can consider different ways of managing them, they form a permanent endowment and this means that Trustees have a duty to balance the needs of both today and tomorrow. So, we cannot spend all our funds - in any given year the total we can distribute is always set within limits.

Hampton Fund is the custodian of an important community asset. Working within limits means that greater clarity on the need we exist to meet, and our purpose in addressing that need, will help us to maximise the impact of this asset at a time when demand for it continues to be so high.

This has been the starting point for our strategic review, which began in February 2024.



\*Forecast



## Need, Purpose and Vision

Our history is rooted in supporting those struggling to meet their basic needs. This has remained important to us, and drove our response to the pandemic and cost of living crisis. Therefore, we have recognised through our review the problem we exist to address, above all others, is that 'people are experiencing financial and other hardships'.

The term 'hardship' is one that helps us to describe those facing a range of definable challenges whether financial, related to health or disability, or emotional. It captures those who are 'barely surviving' through to those who are 'just about managing'.

The three statements below take these insights to clarify: who we exist for; what we are here to do; and our ambitions as an organisation. From this our priorities are clearer, and this will guide the decisions we make going forwards.

### Need

Some of us are struggling with financial, physical and emotional hardship without adequate support.

### Purpose

Creating opportunities to live well by relieving the burden of financial, physical and emotional hardship in our community.

### Vision

An empowered, resilient and compassionate community where everyone has an equal opportunity to thrive.



The diagram below shows a model which underpins our defined purpose. It also helps us to recognise that it is a combination of relieving the burden of material hardship with that of creating opportunities to live well that will create the best chance of an individual or family moving towards a situation where they can 'thrive'.

Our funding will therefore be targeted at supporting those at the 'surviving' or 'striving' stages, and it will be most powerful when it is working in combination across these two stages.

## Survive

Those that are facing:

- Immediate challenges of hardship
- Insecurity
- Not having basic needs met

## Hampton Fund core focus

Helping those experiencing hardship and those who are struggling and striving to overcome life's challenges.

We provide relief from hardship and create the opportunity for people to move beyond it.

Whilst not a substitute for the welfare state, we are here when other processes and systems of support are failing.

## Strive

Those in a transitional phase who are:

- Overcoming challenges
- Working towards better outcomes
- Making positive changes

## Thrive

Those at a stage where they can:

- Flourish and grow
- Fulfil their potential
- Lead more meaningful lives

## Hampton Fund aspiration

Whilst our vision is that everyone has an opportunity to thrive, this is not an area of direct focus or investment.

Another way of thinking about this is that our funding can help provide support in relation to income (or material) deprivation as well those missing the social connections and resources to live well. That which sits outside of these two areas is unlikely to be supported.

## Protecting people from hardship

### Income Safety Net\*

**Enough money to at least afford the essentials.**

*For example:*

- Emergency and crisis funds
- Practical help to get people back on their feet
- Help in accessing other financial support

### Social Safety Net\*

**Being able to find connection, purpose, relationships and the right help at the right time.**

*For example:*

- Strengthening connections across services, signposting
- Creating opportunities (places and spaces) for people to meet and receive support
- Services focused on improving wellbeing

We are clear that our focus is to reach individuals and families. We can do this both through supporting the work of community organisations, as well as direct support by making grants to individuals.

Our longer-term vision is about an individual's ability to thrive as part of the local community, and the type of community we would like that to be. However, with limited resources, we will focus on support targeted at individuals and families, rather than the broader community, as our contribution to achieving this vision.

**Our longer-term vision is about an individual's ability to thrive as part of the local community, and the type of community we would like that to be**

\*Joseph Rowntree Foundation - Designing Out Hardship and Destitution (October, 2023)

## Mechanism of Change

We recognise that we are an integral part of the local social care 'ecosystem' and that we can make more impact if we understand and optimise our role in this system.

A constant focus on the impact we are achieving will make us more intentional in our approach to grant making. It can also help us develop as a 'learning organisation', one that uses the insights it gains from trying to better understand its impact to improve both its own grant making, but also in support of the work, and shared goals, of the wider social care ecosystem.

The diagram below illustrates how we will work as an organisation in service of these aims.





## Theory of Change

Our 'theory of change' is the tool that describes the relationship between the need we are trying to address, the changes we want to make and what we plan to do to achieve this. It aims to align all this as simply as possible to create a shared understanding internally and externally. This will help us to be clear and focused around our purpose and the impact we are seeking, but also that our partners and stakeholders are too.

In addition, it will help us test the logic of our thinking and uncover any assumptions, so that we can make sure that they are either holding true or, if not, that we dismiss them and shift our thinking.

Finally, it will shape our priorities for monitoring and evaluation, the data we collect and what we report.

Our Theory of Change will help us to be clear and focused around our purpose and the impact we are seeking.



# Theory of Change

## Need

Some of us are struggling with financial, physical and emotional hardship without adequate support.

## Purpose

Creating opportunities to live well by relieving the burden of financial, physical and emotional hardship in our community.

## Vision

An empowered, resilient and compassionate community where everyone has an equal opportunity to thrive.

### Hampton Fund activities

### The change we hope to see

### Impact

Direct

- Understanding local needs
- Raising awareness and understanding of funding/support
- Impactful, adaptable, equitable grant making
- Relationship building with grantees

#### Short Term

- Increased confidence - both internally and of external stakeholders - in HF's grant making decisions
- Improved awareness and confidence of grantees in accessing available support
- Those identified as being in most need report tangible changes through having their basic needs met

#### Long Term

- Funded community organisations can demonstrate consistent achievement of outcomes (relevant to HF) for their users
- Households and individuals report improved financial, physical and emotional resilience and wellbeing

- People experience reduced hardship and more access to opportunities to live well

Collaborative

- Collaborating, convening and influencing with social support sector partners and others to deliver a shared vision

- More holistic shared understanding of identified issues and needs

- A social support sector that offers increasingly effective support and more opportunities for those in hardship

## Strategic Goals

In order to ensure that we are delivering our work as outlined in the theory of change we have set ourselves a series of goals. Within the next three years we will have created an organisation, and developed our ways of working, as described by the following.

### GOAL 1:

**We will build an agile, collaborative organisation, one willing to develop new and different approaches.**

**We will understand and maximise our role in the local social care sector, building partnerships and collaborations that help us deliver both our purpose and more impact.** We recognise that we are part of the local social care 'ecosystem', but we also have an overview of it. Other organisations may understand an issue in more depth, but our broader knowledge is also a strength. We cannot create change on our own: collaboration with other charities and bodies, where we share their goals, will help us all deliver more for those that we exist to support.

We have experience of a wide spectrum of local need and, while we can always know and understand more, where our knowledge and understanding provides us with insights about unmet need **we will work with the local Voluntary and Community Sector (VCS) and others to consider how best to close those gaps.**

We will look for longer term solutions wherever we can, but understand that change first requires meeting immediate needs.

**We will be open to funding new initiatives or use funding differently to support our goals.**

We will be more intentional in terms of the decisions we make when we identify gaps and will strive to be as creative as we can about how our funding can best be utilised in relation to this. We will be clear when it is right to take something new on ourselves, because we can see how our grant making can help address it, but we will also be clear when change is best affected elsewhere. In these cases, we will decide if there is still a useful contribution we can make to the conversation.

**We will be supportive of a resilient, adaptable and innovative VCS** so that more people have access to opportunities to live well as a result. We will listen to what organisations need, consider where best they can get that and what we can do to facilitate it.

While we have been collaborative in the past, we will now formalise our approach. Working in this way will help define us as an organisation, and be the engine of ongoing development. It is hoped that it will have a multiplier effect on the grants that we give, and it will help us remain outward looking, alive to changing circumstances, and maintain an agile approach.

We will be prepared to take managed risks and be constantly asking ourselves **can we do more and better?**



## GOAL 2:

We will develop our grant making approach and processes to be of the highest quality & efficacy.

**We will not be rigid in our approach, we are not a big bureaucracy or a machine, so we will listen to the human stories at the centre of any application.**

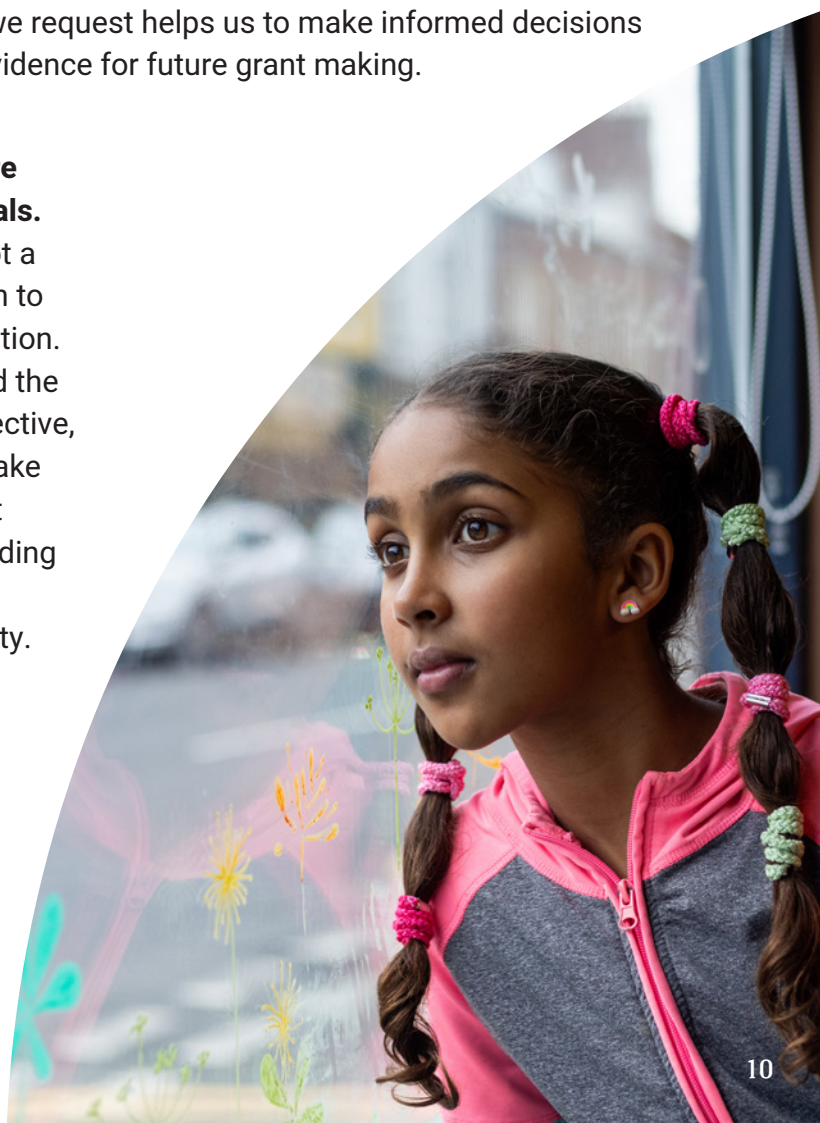
**We will ensure our systems and processes are effective in supporting the delivery of our goals.**

We will not be rigid in our approach, we are not a big bureaucracy or a machine, so we will listen to the human stories at the centre of any application. We will ensure that our definitions of need and the criteria for acceptance or rejection are as objective, evidence based and transparent as we can make them. We will review and improve all our grant making systems. All barriers to accessing funding will be constantly assessed and changes and adaptations made to increase fairness and equity.

We will not waste people's time, **we will make decisions quickly and be transparent on our priorities and decisions.**

**We will make decisions based on an ongoing process of gathering evidence and assessing the level and nature of local need.** We will increase our depth of understanding through a range of sources: from published research; data and knowledge of local organisations; and from individuals' direct experiences of hardship. Where evidence does not exist elsewhere, we may commission new research ourselves.

**We will build trusting relationships with grantees.** Through building partnerships with those that we support our funding can achieve more - both in individuals' lives or in organisations' work - and that in turn means we will too. We already have long and trusting relationships with many organisations, we will build on this by always seeking to understand what they are trying to achieve, and the challenges they face, and consider appropriate adaptations to our grant making to best support them. We will challenge ourselves to ask whether we have the right balance of risk between ourselves and funded organisations. We will reduce barriers and lighten the burden on applicants wherever we can, by striving to only ask relevant questions and collect the information we really need, and by minimising the impact of the processes we require them to go through. We will communicate clearly and articulate how the information we request helps us to make informed decisions and gather evidence for future grant making.



## GOAL 3:

We will understand our impact and use the learning from this process to constantly seek to improve what we do.

Through building trusting relationships, we will encourage grantees to be honest about what they really need and their challenges.

Because we have limited resources, we will strive for each pound granted to deliver the maximum positive impact.

**We will develop the right systems and measurement tools to help us understand our impact,** but we will work to ensure that our desire to understand impact does not become a burden on grantees. We will aim for the quantitative and qualitative measures of grant making we develop to be applied consistently and transparently, and we will strengthen the objective measures of outcomes, both in terms of quality as well as quantity, as far as we can. We will recognise we cannot always measure the same outcomes across organisations but will take account of the nature of their work; what that organisation is trying to achieve and the data that is being collected anyway.

**We will use the insights from learning more about our impact to consistently improve our grant making.** We will create processes for feeding this learning back into our decision making. We recognise that learning is a two-way street, and we will learn from the impact reporting and good practice of other organisations.

Through building trusting relationships, we will encourage grantees to be honest about what they really need and their challenges. We will encourage genuine feedback on how we operate that we can use to help us improve.

**We will stop seeing our two grant programmes as serving separate ends.** We will work to establish if they deliver more impact when they work in tandem. We will question why it is that our individual grantees are not accessing particular services that we are funding, and that could be benefiting them. We will therefore look to see if there are better ways to cross refer between those benefiting from individual grants and the community organisations that we fund.

**We will share our impact and what we learn externally.** We understand that sharing information can be the catalyst to creating change. The more people that are aware of an issue - and both the successes and challenges in addressing it - the greater the chance of better or alternative solutions. We will therefore share our learning where this can help create more change. Greater transparency will also build more trust amongst our wider stakeholders.



## GOAL 4:

We will communicate the organisation's purpose, grant offer and impact clearly, effectively and transparently.

We will identify the barriers to communicating effectively, and work to address them.

**We will make clear our purpose and priorities, and communicate this consistently to all our stakeholders.** We recognise the more information we communicate externally, the more people will know we are here and how we can help them. We will identify the barriers to communicating effectively, and work to address them.

**We will champion those we support.** We understand that as a grant maker we can amplify the voice of those that we support, both individuals and organisations. We will therefore highlight their successes and increase awareness of challenges they face. We will engage in forums and debates in the local sector (and beyond) where we believe doing this will help us to increase the impact of our grant making to those we support.

**We will determine areas where we are not reaching those that could benefit from our funds and promote our grant making to them.** We will undertake ongoing analysis of where our funds are reaching and how this maps to local need. Where we identify that we can reach more who may be able to benefit, we will use a range of different methods to promote the availability of our grants.

**We will be transparent in our decision making** and strengthen our accountability with our stakeholders. We recognise the importance of doing this for those we exist to support, but how it can also benefit us in achieving all our goals.





## Supporting Goals

Delivering the following will support us in achieving our overarching strategic goals.

### SUPPORTING GOAL 1:

#### Ensure the most effective use of our resources, both now and for the future

We will challenge ourselves as to whether we can be leveraging more impact with our available resources by doing things in a different way.

We will ensure our approach to managing the endowment aligns with our broader strategy goals; in particular, that we maintain the right balance between utilising funds today and in the future; but also between maximising financial returns and the social impact of investments.

We will ensure that we remain cost effective by maximising the funds we can give out within the resources we have available, while carefully considering any investment in our infrastructure needed to deliver our goals.

Wherever we can, we will ensure our current, or any future, property investment or interests support our strategic goals.

### SUPPORTING GOAL 2:

#### Uphold the highest standards in governance

We have a highly skilled and committed Board of Trustees, but as the organisation develops we will ensure the Board reflects the balance of skills, experience and diversity needed to continue delivering the best governance, leadership and accountability for the organisation. We will carefully consider any changes in our governance structure needed to deliver this.

We will regularly review our governance approach, and be open to developments and changes that can make it stronger. This includes ensuring our policies are effective and take account of a rapidly changing external environment, in terms of legal and regulatory developments, but also important issues such as those relating to equity, diversity and inclusion.

We will take a proactive approach to risk management, to ensure that we are always vigilant about potential threats to the organisation. At the same time, we will constantly challenge ourselves on our attitude and approach to risk, so that it is proportionate and in the best interests of those we exist to serve.

### SUPPORTING GOAL 3:

#### Develop a thriving and effective staff team

We will make sure that all staff feel invested in our strategic goals and are both motivated, and supported effectively, to deliver the work required to achieve them. At the same time, staff are always clear on their responsibilities and what the organisation expects of them. This also means making sure we have the right staffing structure and balance of skills in place.

We will ensure that staff have a positive working environment and access to a wide range of development opportunities to help them deliver to their best abilities. We will ensure that they are recognised appropriately for their efforts, and will think broadly about how this can be most effectively achieved within the resources available.

## Measuring and Reporting on Our Progress

For each year of the strategy we will create an operational plan that sets out the objectives, key activities and timelines in undertaking the work needed to deliver our strategic goals. Each member of staff will have an annual workplan that links their work to the overall operational plan. Both the overall operational plan and individual plans will be reviewed regularly – the former by trustees through Board meetings and the latter through the performance and development process.

Our overall objective is to increase our impact, this we will do by measuring the outcomes identified in our theory of change. Annually, we will then publish an Impact Report, but we will also feed the learning from this process back into our decision making and forward planning, to help us to continually challenge ourselves to do more and better.



# Strategic Goals at a Glance

## Goal 1

**We will build an agile, collaborative organisation, one willing to develop new and different approaches.**

We will understand and maximise our role in the local social care sector, building partnerships and collaborations that help us deliver our purpose and more impact.

We will work with the local Voluntary & Community Sector and others to consider how best to close gaps in unmet need.

We will be open to funding new initiatives or use funding differently to support our goals.

We will be supportive of a resilient, adaptable and innovative Voluntary & Community Sector so more people have access to opportunities to live well as a result.

## Goal 3

**We will understand our impact and use the learning from this process to constantly seek to improve what we do.**

We will develop the right systems and measurement tools to help us understand our impact.

We will use the insights from learning more about our impact to consistently improve our grant making.

We will stop seeing our two grant programmes as serving separate ends.

We will share our impact and what we learn externally.

## Goal 2

**We will develop our grant making approach and processes to be of the highest quality and efficacy.**

We will make decisions based on an ongoing process of gathering evidence and assessing the level and nature of local need.

We will build trusting relationships and partnerships with grantees.

We will ensure our systems and process are effective in supporting the delivery of our goals.

We will make decisions quickly and be transparent on our reasons.

## Goal 4

**We will clear communicate the organisation's purpose, grant offer and impact clearly, effectively and transparently.**

We will make clear our purpose and priorities, and communicate this consistently to all our stakeholders.

We will champion those we support.

We will determine areas where we are not reaching those that could benefit from our funds and promote our grant making to them.

We will be transparent in our decision making.

## Supporting Strategies

Ensure the most effective use of our resources, both now and for the future

Uphold the highest standards in governance

Develop a thriving and effective staff team





Hampton  
Fund

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[www.hamptonfund.co.uk](http://www.hamptonfund.co.uk)

Hampton Fund is the working name for Hampton Fuel Allotment Charity (Registration No.211756)