



National  
Benevolent  
Charity

Improving lives since 1812



# OUR STRATEGY & THEORY OF CHANGE 2026-2029

# Our Purpose, Values and Theory of Change

## Our Purpose

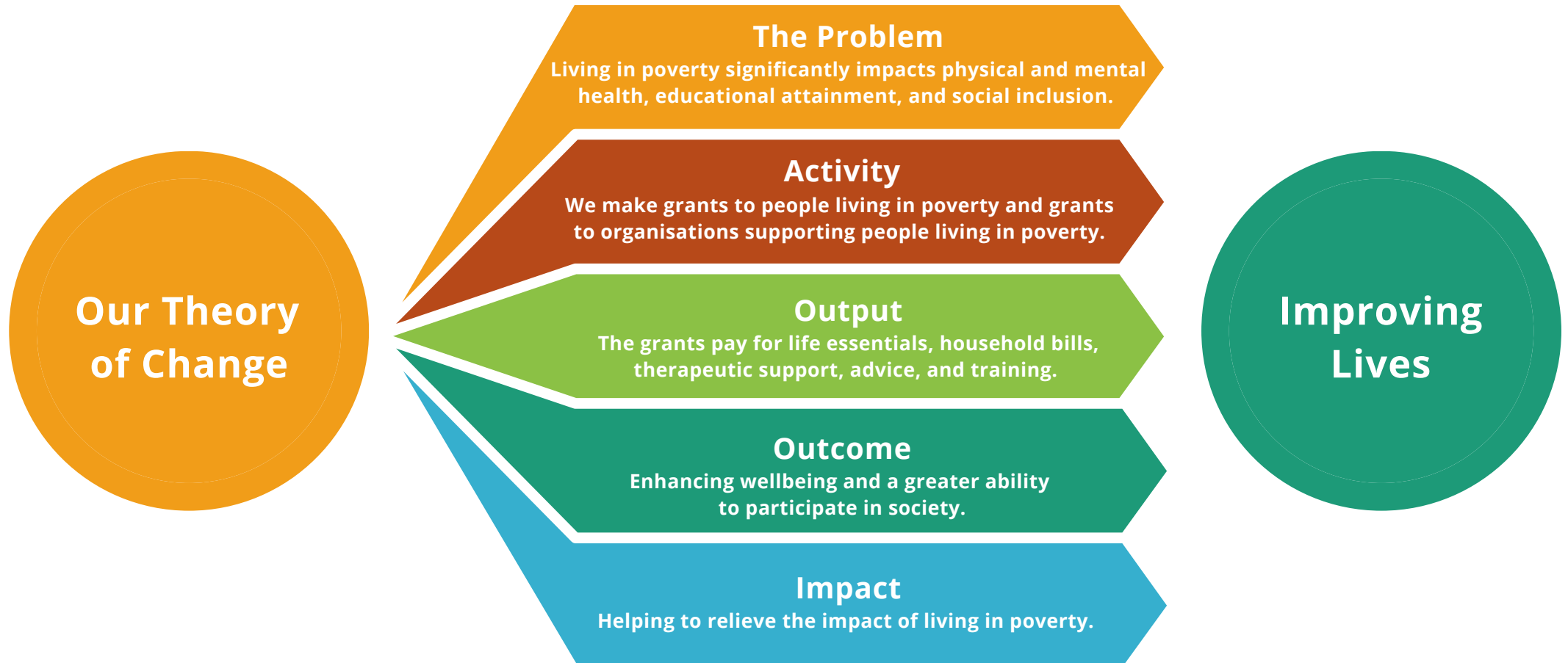
Our work is focussed on helping people in a time of need, by offering individual grants to people who are living in poverty or financial hardship and grants to organisations working to relieve poverty in the UK. We also collaborate with other funders and referral agencies to offer the widest support possible and aim to be inclusive and equitable in our grant giving.

## Our Values

**We are Compassionate.** We never forget that people are at the heart of what we do.

**We are Collaborative.** We know we can make a greater difference by working with others.

We are **Innovative** in pursuit of our purpose.



# Our Strategic Aims and how we will deliver

## Our Strategic Aims

**Aim 1** - To deliver financial support to people living in poverty or financial hardship through a programme of individual and organisational grants with the aim of enhancing wellbeing .

**Aim 2** - To deliver better impact for those living in poverty by collaborating with other organisations and co-producing with experts, including those with lived experience, continually evaluating, learning, and improving.

**Aim 3** - To support organisations campaigning for change in policy, practice, and public opinion by amplifying the voice of those with lived experience.

**Aim 4** - To strengthen our Governance and oversight by working within the Charity Governance Code

**Aim 5** - To deliver greater impact by maximising our assets and securing new income

**Aim 6** - To ensure the principles of diversity, equality and inclusion are at the core of everything we do.

## How we will deliver on our aims

We will address the needs and expectations of organisations and people living in Bristol, Gloucestershire, and Wiltshire & Swindon who apply to us for grant support, and respond in a timely and appropriate way, taking each case on its merits and giving feedback where appropriate. We will also try to balance our portfolio in terms of beneficiaries, priority area, and type of organisation.

We will develop new strategic partnerships with organisations which share our objectives and values, to develop new programmes and ways of working.

We will report and evidence the consequences of living in poverty to organisations aiming to influence change in policy, practice, and public opinion.

We will identify areas for development, recruit new board members with the requisite skills and experience to deliver the strategy, and review and refresh policies to ensure they remain relevant.

We will increase sustainable income by raising funds through legacies, trusts and foundations, and ensure our investments are being managed professionally and ethically.

We will agree and deliver a diversity, equity and inclusion action plan.